



**Elementary and Secondary School Emergency Relief Funds II  
 (Coronavirus Response and Relief Supplemental Appropriations)  
 March 2024**

**Budget (HB630)**

	<u>Budget Begin</u> 1/5/2021	<u>Budget End</u> 9/30/2022	<u>Tydings</u> 9/30/2023
Funding			\$ 170,099,465
Distribution based on Title I formula (FY 2019)			\$ 153,089,519
10% Allowable Set Aside			\$ 17,009,947
			<u>\$ 170,099,465</u>
<i>Break Out of the 10% Set Aside:</i>			
School Districts Supplemental			\$ 3,400,000
Other Educational Institutions			\$ 120,000
Special Needs			\$ 2,500,000
School Districts Targeted Support			\$ 1,200,000
Education Leadership in Montana			\$ 939,449
OPI Data Base Modernization			\$ 8,000,000
0.5% Administrative Costs			\$ 850,497
			<u>\$ 17,009,947</u>

**Financial Activity**

<u>Administration</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
Administrative	\$ 850,497	\$ 850,497	\$ 0	100%
Educational Leadership	\$ 939,449	\$ 805,619	\$ 133,830	86%
Data Base Modernization	\$ 8,000,000	\$ 8,000,000	\$ -	100%
	<u>\$ 9,789,946</u>	<u>\$ 9,656,116</u>	<u>\$ 133,830</u>	<u>99%</u>
<u>Flowthrough</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
BASE	\$ 153,089,519	\$ 153,089,519	\$ -	100%
School Districts Supplemental	\$ 3,400,000	\$ 3,400,000	\$ -	100%
Other Educational Institutions	\$ 120,000	\$ 120,000	\$ -	100%
Special Needs	\$ 2,500,000	\$ 2,500,000	\$ -	100%
School Districts Targeted Support	\$ 1,200,000	\$ 1,200,000	\$ -	100%
	<u>\$ 160,309,519</u>	<u>\$ 160,309,519</u>	<u>\$ -</u>	<u>100%</u>
	<u>Total Funding Allocated</u>	<u>Total Expended</u>	<u>Total Balance</u>	<u>Total % Expended</u>
	\$ 170,099,465	\$ 169,965,635	\$ 133,830	100%

As of 2/10/2024



## Elementary and Secondary School Emergency Relief Funds III (American Rescue Plan Act)

### Budget (HB632)

	<u>Budget Begin</u> 3/24/2021	<u>Budget End</u> 9/30/2023	<u>Tydings</u> 9/30/2024
<i>Funding</i>			\$ 382,019,236
<i>Distribution based on Title I formula (FY 2019)</i>			\$ 343,817,312
<i>10% Allowable Set Aside</i>			\$ 38,201,924
			\$ 382,019,236
<i>Break Out of the 10% Set Aside:</i>			
<i>School Districts Supplemental</i>			\$ 3,400,000
<i>Other Educational Institutions</i>			\$ 120,000
<i>Education Leadership in Montana</i>			\$ 555,234
<i>OPI Data Base Modernization</i>			\$ 5,475,248
<i>State Loss of Instructional Time</i>			\$ 19,100,962
<i>State Summer Enrichment</i>			\$ 3,820,192
<i>State After School Programs</i>			\$ 3,820,192
<i>0.5% Administrative Costs</i>			\$ 1,910,096
			\$ 38,201,924

### Financial Activity

<u>Administration</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
<i>Administrative</i>	\$ 1,910,096	\$ 1,021,339	\$ 888,757	53%
<i>Educational Leadership</i>	\$ 555,234	\$ -	\$ 555,234	0%
<i>Data Base Modernization</i>	\$ 5,475,248	\$ 3,091,272	\$ 2,383,976	56%
<i>State Loss of Instructional Time</i>	\$ 19,100,962	\$ 10,071,469	\$ 9,029,493	53%
	\$ 27,041,540	\$ 14,184,080	\$ 12,857,460	52%
<u>Flowthrough</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
<i>Base</i>	\$ 343,817,312	\$ 193,714,484	\$ 150,102,828	56%
<i>School Districts Supplemental</i>	\$ 3,400,000	\$ 1,948,963	\$ 1,451,037	57%
<i>Other Educational Institutions</i>	\$ 120,000	\$ 46,834	\$ 73,166	39%
<i>State After School Programs</i>	\$ 3,820,192	\$ 2,589,266	\$ 1,230,926	68%
<i>State Summer Enrichment</i>	\$ 3,820,192	\$ 1,133,404	\$ 2,686,788	30%
	\$ 354,977,696	\$ 199,432,951	\$ 155,544,745	56%
	<b><u>Total Funding Allocated</u></b>	<b><u>Total Expended</u></b>	<b><u>Total Balance</u></b>	<b><u>Total % Expended</u></b>
	\$ 382,019,236	\$ 213,617,031	\$ 168,402,205	56%

As of 2/10/2024



## Homeless Children and Youth I (American Rescue Plan Act)

### Budget

	<u>Budget Begin</u> 4/23/2021	<u>Budget End</u> 9/30/2023	<u>Tydings</u> 9/30/2024
<i>Funding</i>			\$ 625,607
<i>Distribution Administrative (25%)</i>			\$ 156,402
<i>Distribution Base (75%) (Current Grant Recipients + four schools w/highest homeless students)</i>			\$ 469,205
			\$ 625,607

### Financial Activity

<u>Administration</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
<i>Administrative</i>	\$ 156,402	\$ 69,510	\$ 86,892	44%
<u>Flowthrough</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
<i>Base</i>	\$ 469,205	\$ 293,986	\$ 175,219	63%
	<u>Total Funding Allocated</u>	<u>Total Expended</u>	<u>Total Balance</u>	<u>Total % Expended</u>
	\$ 625,607	\$ 363,496	\$ 262,111	58%
<i>As of 2/10/2024</i>				



## Homeless Children and Youth II (American Rescue Plan Act)

### Budget

	<u>Budget Begin</u> 4/23/2021	<u>Budget End</u> 9/30/2023	<u>Tydings</u> 9/30/2024		
<i>Funding</i>				\$	1,876,823
<i>Distribution Administrative (25%)</i>				\$	469,206
<i>Distribution Base (75%) (Formula Grant - 50% Based on % of Title IA funds 50% based on % of identified homeless students)</i>				\$	1,407,617
				\$	1,876,823

### Financial Activity

<u>Administration</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
<i>Administrative</i>	\$ 469,206	\$ 23,408	\$ 445,798	5%
<u>Flowthrough</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
<i>Base</i>	\$ 1,407,617	\$ 745,356	\$ 662,261	53%
<u>Total Funding Allocated</u>	<u>Total Expended</u>	<u>Total Balance</u>	<u>Total % Expended</u>	
	\$ 1,876,823	\$ 768,764	\$ 1,108,059	41%
<i>As of 2/10/2024</i>				



## Emergency Assistance for Non-Public Schools II (Coronavirus Response and Relief Supplemental Appropriations)

### Budget

	<u>Budget Begin</u>	<u>Budget End</u>	<u>Tydings</u>		
	9/24/2021	9/30/2023	9/30/2024		
<i>Funding</i>				\$	12,063,324
<i>Distribution (Base + Low Income Supplement)</i>				\$	11,863,324
<i>Administrative</i>				\$	200,000
				\$	12,063,324

### Financial Activity

<u>Administration</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
<i>Administrative</i>	\$ 200,000	\$ 48,787	\$ 151,213	24%
<u>Flowthrough</u>	<u>Funding Allocated</u>	<u>Expended</u>	<u>Balance</u>	<u>% Expended</u>
<i>Base</i>	\$ 5,581,871	\$ 775,279	\$ 4,806,592	14%
	<u>Total Funding Allocated</u>	<u>Total Expended</u>	<u>Total Balance</u>	<u>Total % Expended</u>
	\$ 5,781,871	\$ 824,066	\$ 4,957,805	14%
	<u>Total Funding Unallocated</u>			
Balance Reverted to GEER	\$ 6,281,453			

*As of 2/10/2024*

### Contacts

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Chief Financial Officer – Jay Phillips at 444-4523 or [jphillips3@mt.gov](mailto:jphillips3@mt.gov)



## ESSEER III [monthly Status](#)

Month	Allocation Total	Payment Total	Remaining Total
<a href="#">February</a>	\$347,337,312.00	\$194,925,026.00	\$152,412,286.00

Pre-pandemic (2018) district available funding was \$10, 500 per student (147,713 students). Post-pandemic (2022) district available funding was \$13, 209 per student (150,126 students). ESSEER funds fully available in 2022 added \$588M or \$3,916 per student. In some cases, ESSEER doubled district available funds. ESSEER I, II, and II were awarded to Districts within an 11-month window and allowed tremendous flexibility in spending (time frame and allowable uses. These funds added an additional \$3,916 per student with district allocations ranging from \$10,000 to \$36M.

## ESSEER overall timeline, allocation, spending, and requirements

### ESSEER Grants Timeline



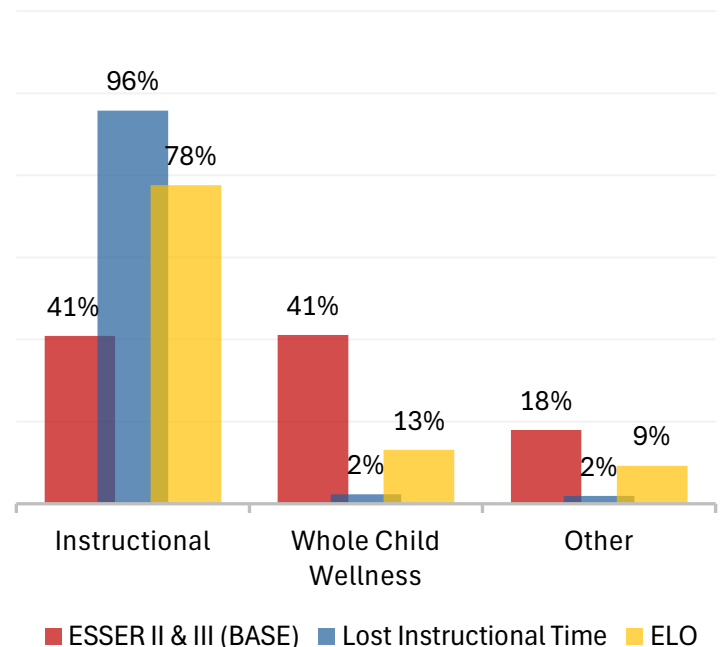
### ESSEER II \$170M Grant Compliances

- Use of Funds- [FAQ, Allowable/Reasonable, ARP Plan \(spending priorities\)](#)
- ESSEER adaptable applications ([monitoring and audits](#))
- Large and/or capitalized expenditures (compliances)
- Annual Grant Reporting [previous years data](#)

### ESSEER II, III, & ELO Use of Funds as of February 2024

Instructional Needs	Expended	%
Address Learning Loss	\$105,893,173	28%
Dedicated Learning Devices	\$5,568,638	1%
Home Internet for Students	\$98,898	0%
Supplemental Learning	\$41,551,957	11%
Technology	\$21,600,062	6%
<b>Instructional Needs Subtotal</b>	<b>\$174,712,728</b>	<b>47%</b>
<b>Whole Child Wellness</b>		
Mental Health	\$9,274,106	2%
Minimize Spread of Infection	\$119,553,578	32%
Supplemental Services	\$9,579,407	3%
<b>Whole Child Subtotal</b>	<b>\$138,407,091</b>	<b>37%</b>
<b>Other</b>		
Indirect Cost	\$4,695,173	1%
Other	\$56,240,692	15%
<b>Indirect Cost Subtotal</b>	<b>\$60,935,865</b>	<b>16%</b>
<b>Total Expenditures</b>	<b>\$374,055,684</b>	<b>100%</b>

### Use of Funds Comparison as of February 2024



The majority of ESSER spending between December 2020 and December 2023 has been for deferred maintenance, salary/benefits, and technology. Between September 2022 and 2023, there were roughly 313 large project expenditures made using ESSER Funding. Between October and December of 2023, there were roughly 95 projects. The majority of these projects or larger purchases were part of the district's initial ESSER II and III projected budgets. However, because districts continue to have an influx of administrative-level staff the projects have evolved and changed.

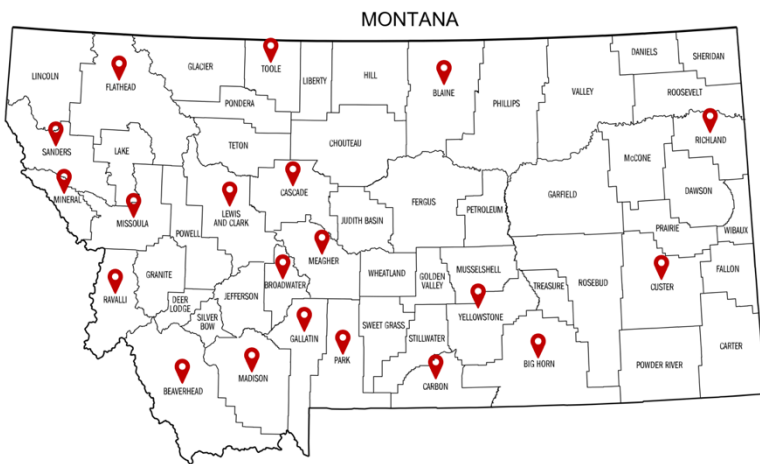
### ESSER Grant Funding Project Outcomes

- 283 schools representing 709 projects
- 293 Air Quality (HVAC, windows, asbestos)
- 75 Water projects (lead, bathroom, touchless)
- 84 Safety projects (cameras, doors, fence)
- 86 Technology (server, chrome, iPad)
- 54 Outdoor Learning Space
- 27 Communication (phone, reader boards)
- 29 Curriculum
- 36 Transportation

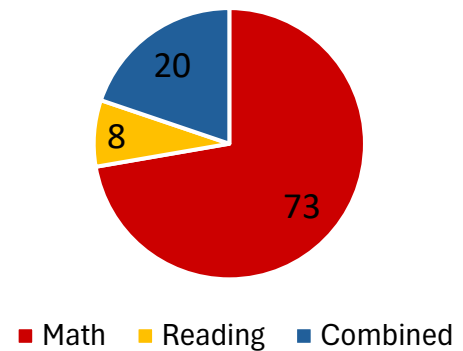
Improving relationships and building healthier learning environments, ESSER helped to build bridges to the future for many students, staff, and communities throughout Montana.

## Extended Expanded Learning Opportunities – targeted spending

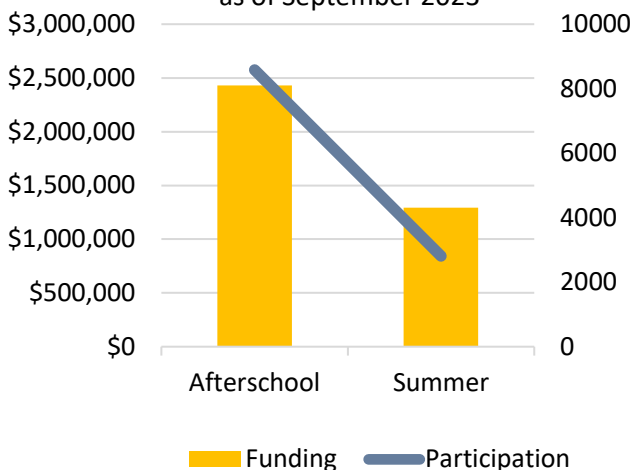
### ELO Programs Across the State



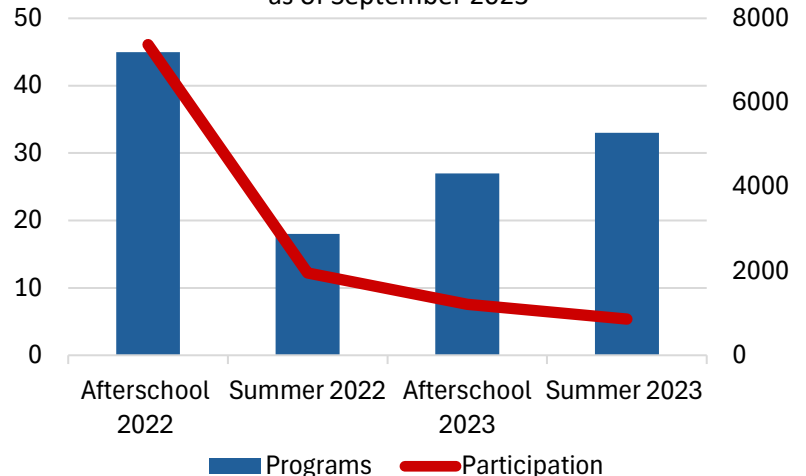
ELO Program Focus as of September 2023



ELO Spending vs. Student Participation as of September 2023



ELO Programs vs. Student Participation as of September 2023



ESSER funds were often used to help sustain proficiency levels despite record high reporting of mental health indicators in the youth population ([Youth Risk Behavior Survey](#)). Outdoor Learning Spaces, first declined as 'unreasonable' by the Department of Education, are now accepted as evidence-based contributors ([National Institutes of Health](#)) to mental health leading to improved engagement and learning. The influx of funding to schools was successfully managed by school administration, clerks, and staff. This is despite the lack of additional staff to manage the increase in funds and their complexities.

Moving forward Extended Expanded Learning Opportunity Summer 2024 (model for Lost Instructional Time)

- Strengthens school priorities by facilitating partnerships between nonpublic and school entities and braiding of resources in support of school priorities and especially academics. With only 34% of students participating in sports, extracurricular, and Career Technical Student Organizations combined, the need for these partnerships is increasing.
- Generates a safe setting for schools and community organizations to partner and develop pilots.
- Build alternative funding sources by creating opportunities for school staff to gain knowledge, skills, and ability to manage projects and grants.
- Fosters and promotes recruitment and retention opportunities.

**Example:**

Rotary and 4-H clubs review the school's [report card](#) and see non-proficient math scores. Rotary and 4-H partnered together to create a summer woodworking camp for middle schoolers. Students create 10 sawhorses each, learning measurement and budgeting skills. Students in the local National Honors Society and DECA developed a plan to sell the sawhorses as table legs obtaining donated tabletops from closet doors donated by Habitat for Humanity. Staffing is provided by Rotary members, AmeriCorps Vista, and college interns. Youth Serve America and 4-H curriculum is used while the material is provided by ELO grant. College Math Education students entering their final year of college are hired for 3 weeks at \$5k each and hosted at Rotary, PEO, and faith-based members' homes. The pilot project curriculum is updated by AmeriCorps Vista, NHS, and DECA, under college marketing interns design pamphlets to share with other schools who may want to develop similar programs.

Outcome:

- Student participants increase math and communication knowledge, skill, and ability plus gain college/career insight.
- School and community build stronger partnerships and build support for future grants.
- School gains observation over 'would be teachers' – recruitment and retention.
- Current school staff, not in the program, gain appreciation for the work they do as the students gain skill.
- NHS and 4-H students become eligible for Gloria Barron, Horatio Alger, Emerging Visionaries, and other Youth Voice Scholarships.

## Hamilton Players



With the support of ESSER ELO funding, Hamilton Players has achieved several measurable education goals that support Montana youth development. With a focus on reading education to address learning loss, Hamilton Players provided students with learning-based activities like script reading and self-confidence through performance.

**ELO Application History**  
Summer 2023

**Total ELO Funding**  
\$25,000

**Program Focus**  
Reading