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OFFICE OF PUBLIC INSTRUCTION
STATE OF MONTANA

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Elementary and Secondary School Emergency Relief Funds I
(Coronavirus Aid, Relief, and Economic Security Act)

Budget

	Budget Begin 4/29/2021	Budget End 9/30/2021	Tydings 9/30/2022		
Funding			$ 41,295,230		
Distribution based on Title I formula (FY 2019)			$ 37,165,707		
10% Allowable Set Aside			$ 4,129,523		
			$ 41,295,230		
Break Out of the 10% Set Aside:					
Portion to Adjustment to Minimum			$ 613,991		
District Allocation Based on Related Service			$ 2,059,852		
Allocation Based on Related Service as Passthrough to Cooperative			$ 940,148	$	3,000,000
0.5% Administrative Costs			$ 206,476		
Remaining Set Aside for OPI Covid 19 Relief Use			$ 309,056		
			$ 4,129,523		

Financial Activity

Administration	Funding Allocated	Expended	Balance	% Expended
Administrative	$ 206,476	$ 206,476	$ -	100%
Set Aside	$ 189,056	$ 189,056	$ -	100%
Other Educational Institutions	$ 120,000	$ 120,000	$ -	100%
	$ 515,532	$ 515,532	$ -	100%

Flowthrough	Funding Allocated	Expended	Balance	% Expended
Base	$ 37,779,698	$ 37,779,698	$ -	100%
Related Services	$ 3,000,000	$ 3,000,000	$ -	100%
	$ 40,779,698	$ 40,779,698	$ -	100%

Total Funding Allocated	Total Expended	Total Balance	Total % Expended
$ 41,295,230	$ 41,295,230	$ -	100%

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

Budget (HB630)

	Budget Begin 1/5/2021	Budget End 9/30/2022	Tydings 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
			$	170,099,465
Break Out of the 10% Set Aside:				
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
			$	17,009,947

Financial Activity

Administration	Funding Allocated	Expended	Balance	% Expended
Administrative	$ 850,497	$ 850,497	$ 0	100%
Educational Leadership	$ 939,449	$ 804,026	$ 135,423	86%
Data Base Modernization	$ 8,000,000	$ 8,000,000	$ -	100%
	$ 9,789,946	$ 9,654,523	$ 135,423	99%

Flowthrough	Funding Allocated	Expended	Balance	% Expended
BASE	$ 153,089,519	$ 123,952,518	$ 29,137,001	81%
School Districts Supplemental	$ 3,400,000	$ 2,512,354	$ 887,646	74%
Other Educational Institutions	$ 120,000	$ 73,789	$ 46,211	61%
Special Needs	$ 2,500,000	$ 1,537,964	$ 962,036	62%
School Districts Targeted Support	$ 1,200,000	$ 584,305	$ 615,695	49%
	$ 160,309,519	$ 128,660,930	$ 31,648,589	80%

Total Funding Allocated	Total Expended	Total Balance	Total % Expended
$ 170,099,465	$ 138,315,453	$ 31,784,012	81%

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

Budget (HB632)

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

Financial Activity

Administration	Funding Allocated	Expended	Balance	% Expended
Administrative	$ 1,910,096	$ 382,801	$ 1,527,295	20%
Educational Leadership	$ 555,234	$ -	$ 555,234	0%
Data Base Modernization	$ 5,475,248	$ 18,244	$ 5,457,004	0%
State Loss of Instructional Time	$ 19,100,962	$ 5,385,509	$ 13,715,453	28%
	$ 27,041,540	$ 5,786,554	$ 21,254,986	21%

Flowthrough	Funding Allocated	Expended	Balance	% Expended
Base	$ 343,817,312	$ 155,349,796	$ 188,467,516	45%
School Districts Supplemental	$ 3,400,000	$ 1,707,424	$ 1,692,576	50%
Other Educational Institutions	$ 120,000	$ 46,834	$ 73,166	39%
State After School Programs	$ 3,820,192	$ 2,326,429	$ 1,493,763	61%
State Summer Enrichment	$ 3,820,192	$ 594,391	$ 3,225,801	16%
	$ 354,977,696	$ 160,024,874	$ 194,952,822	45%

	Total Funding Allocated	Total Expended	Total Balance	Total % Expended
	$ 382,019,236	$ 165,811,428	$ 216,207,808	43%

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Data Base Modernization (HB 367)

Project Status

Project	Funding Allocated	Status
Supporting Positions/Operating	$ 907,367	Contract Established (End 9/30/2024)
Systems Analyst		
Project Management Services	$ 824,180	Contract Established (End 9/30/2024)
Project Manager (TeachMT, Accreditation, Power School)		
TeachMT		
Educator Management - Implementation	$ 636,673	Contract Completed 2022
Educator Management - Maintenance @ $180K Annually - 3 Years Allocated	$ 540,000	Contract In Process (End 9/30/2025)
Single SignOn	$ 308,585	Contract Established (End 9/30/2024)
Project Manager		
2 Systems Analysts		
Accreditation		
Accreditation System - Implementation	$ 465,000	Contract In Process (End 9/30/2024)
Accreditation System - *Maintenance @ $88,700k Annually* - 3 Years Allocated	$ 266,100	Contract In Process (End 9/30/2026)
OPI Data Systems		
Power School		
(Note: *$2.7 Annual Maintenance*)	$ 8,295,843	Contract Established (End 6/30/2025)
System AI/Data Management		
Chat Bots - Implementation	$ 800,000	RFP In Process
Chat Bots - *Maintenance @ $250k Annually* - 1 Year Allocated	$ 250,000	RFP In Process
Qualtrics (Data Management)	$ 181,500	Completed
Totals	**$ 13,475,248**	

Data Base Modernization FTE

IT Operations Manager
Leads the information technology team and provides technical leadership, information, assistance and will lead the IT assignments and tasks coming from the project. Our manager has been involved from the beginning and has been instrumental in contributing to the assessment workshops and other aspects of this project.

Data Manager
Leads the data team and provides knowledge centered around data. Ensures the legal protections for data are followed including policies and procedures. The manager oversees all matters related to the collection, management, reporting, and analysis of data. Understands the data connections from the various data sources and leads the team to formulate

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accurate reporting requirements. Our manager has been involved from the beginning of this project and has provided information needed for the assessment.

IT Business Analyst/Project Managers/Project Coordinator Duties

The project managers oversee the projects for the Data and IT teams. They handle the documentation for changes needed with applications both internal and external to OPI. The project managers assist both the primary project managers for this project and are crucial in insuring all the OPI assignments and tasks are being met in a timely fashion across the agency. They were involved in the assessments and coordinated schedules. They also manage the information being posted to the OPI website.

Achievement in Montana (AIM) Unit Manager

The AIM manager handles the day-to-day operations of the Student Information Systems (SIS). The manager ensures the accuracy of data, manages the data collections, and oversees the validation and certification of the school data reported to OPI for both state and federal reporting. This position is critical with assisting with change of the data flow from different SIS. Additionally, this manager has been leading the consolidation efforts to collect teacher data directly from the SIS.

Security Analyst

Oversees the establishment of privacy and security policy at the OPI and will ensure the many changes coming to our processes follow the necessary privacy and security requirements. They will work with the data lake team to ensure we have the proper training and understanding of how the new security systems for the data will work and new policy and procedures are strictly followed.

2 - Software Developers 3 & 2 - ESSER Software Developers 3

Currently we have four developers. Two of which are retiring this fall. They have been tasked with training two staff in the current systems OPI uses. They all are highly skilled and have incredible institutional knowledge about the vast majority of OPI applications. They all have been instrumental in providing insights, history, knowledge, experience, and understanding to the assessment team as well as the OPI team.

Server Administrators

The system admins provide the server knowledge to make things work. They oversee the servers, ensuring all the applications are working together and monitor the systems health for stability and availability. They manage, analyze, and monitor the network connections in conjunction with SITSD.

Database Administrators (DBA)

The DBAs manage, monitor, maintain, change, update, and ensure the databases work properly. They also manage the backup, recovery, and disaster recovery processes. They work with the developers, users, system admins, and units ensuring all aspects of the applications are connected to the databases and work properly. This team was engaged during the assessment to provide the needed database information and data flows throughout OPI.

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Research Analyst

The Research Analysts manage all data requests, Ed Facts and CCD federal reporting, accountability system, report card, and develop internal and external dashboards using Power Bi and Excel. Currently their involvement with DM has been very limited but will become more extensive once the project matures.

Total Current FTE = 12

Current Vacant IT FTE = 3

- Research Analyst 3
- Data Resource Specialist
- Software Developer 3

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ESSER Allocation and Status Information
(Elementary and Secondary School Emergency Relief)

	ESSER I (CARES)	ESSER II (CRRSA)	ESSER III (ARP)
Total LEA Allocation	$40,779,698	$160,309,519	$354,977,696
Total Expended by LEAs	$40,779,698	$128,660,930	$160,024,874
Total Expended by LEAs	*Percentages based on actual **expenditures**.*	*Percentages based on **budgets** to date.*	*Percentages based on **budgets** to date.*
Types of Usage	**50% Staffing:** Educators, Technology Support, Facilities, Health and Wellness	**45% Staffing:** Educators/Paraprofessionals, Counseling Support, Administration, Facilities	**44% Staffing:** Educators/Paraprofessionals, Summer Program Staff, Counseling Support, Administration, Facilities
Types of Usage	**41.6% Supplies:** Technology and PPE	**22% Supplies:** Technology, Curriculum, PPE	**17% Supplies:** Curriculum, Technology, PPE
	5.6% Property& Property Services: Renovation and HVAC upgrades	**30% Property & Property Services:** HVAC Replacement/Upgrades, Facility Renovations, Facility Expansion	**33% Property & Property Services:** HVAC Replacement/Upgrades, Facility Renovations, Facility Expansion
	2% Professional/Technical Services: Technology Support and Capacity, Facility Maintenance	**2% Professional/Technical Services:** HVAC Maintenance, Technical Support Capacity, Other Facility Maintenance	**2% Professional/Technical Services:** HVAC Maintenance, Technical Support Capacity, Other Facility Maintenance

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Homeless Children and Youth I
(American Rescue Plan Act)

Budget

	Budget Begin 4/23/2021	Budget End 9/30/2022	Tydings 9/30/2023		
Funding				$	625,607
Distribution Administrative (25%)				$	156,402
Distribution Base (75%) (Current Grant Recipients + four schools w/highest homeless students)				$	469,205
				$	625,607

Financial Activity

Administration	Funding Allocated	Expended	Balance	% Expended
Administrative	$ 156,402	$ 20,583	$ 135,819	13%

Flowthrough	Funding Allocated	Expended	Balance	% Expended
Base	$ 469,205	$ 274,214	$ 194,991	58%

	Total Funding Allocated	Total Expended	Total Balance	Total % Expended
	$ 625,607	$ 294,797	$ 330,810	47%
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Homeless Children and Youth II
(American Rescue Plan Act)

Budget

	Budget Begin 4/23/2021	Budget End 9/30/2022	Tydings 9/30/2023		
Funding				$	1,876,823
Distribution Administrative (25%)				$	469,206
Distribution Base (75%) (Formula Grant - 50% Based on % of Title IA funds 50% based on % of identified homeless students)				$	1,407,617
				$	1,876,823

Financial Activity

Administration	Funding Allocated	Expended	Balance	% Expended
Administrative	$ 469,206	$ 7,463	$ 461,743	2%

Flowthrough	Funding Allocated	Expended	Balance	% Expended
Base	$ 1,407,617	$ 564,893	$ 842,724	40%

	Total Funding Allocated	Total Expended	Total Balance	Total % Expended
	$ 1,876,823	$ 572,356	$ 1,304,467	30%

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Individuals with Disabilities Education Act
(American Rescue Plan Act)

Budget

	Budget Begin	Budget End	Tydings		
	7/01/2021	**9/30/2022**	**9/30/2023**		
Funding				$	9,241,420
IDEA B Distribution (Same as General IDEA B Formula)				$	8,600,000
IDEA Preschool Distribution (Same as General Preschool Formula)				$	641,420
				$	9,241,420

Financial Activity

Flowthrough	Funding Allocated	Expended	Balance	% Expended
IDEA B	$ 8,600,000	$ 7,499,669	$ 1,100,331	87%
IDEA Preschool	$ 641,420	$ 530,319	$ 111,101	83%
	Total Funding Allocated	**Total Expended**	**Total Balance**	**Total % Expended**
	$ 9,241,420	$ 8,029,988	$ 1,211,432	87%

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

Budget

	Budget Begin 2/24/2021	Budget End 9/30/2022	Tydings 9/30/2023		
Funding				$	12,816,385
Distribution (Base + Low Income Supplement)				$	12,616,385
Administrative				$	200,000
				$	12,816,385

Financial Activity

Administration	Funding Allocated	Expended	Balance	% Expended
Administrative	$ 200,000	$ 200,000	$ -	100%

Flowthrough	Funding Allocated	Expended	Balance	% Expended
Base	$ 6,322,933	$ 4,182,723	$ 2,140,210	66%

	Total Funding Allocated	Total Expended	Total Balance	Total % Expended
	$ 6,522,933	$ 4,382,723	$ 2,140,210	67%

	Total Funding Unallocated
Balance Reverted to GEER	$ 6,293,452

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

Budget

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

Financial Activity

Administration	Funding Allocated	Expended	Balance	% Expended
Administrative	$ 200,000	$ 16,280	$ 183,720	8%

Flowthrough	Funding Allocated	Expended	Balance	% Expended
Base	$ 5,581,871	$ 401,000	$ 5,180,871	7%

	Total Funding Allocated	Total Expended	Total Balance	Total % Expended
	$ 5,781,871	$ 417,280	$ 5,364,591	7%

	Total Funding Unallocated			
Balance Reverted to GEER	$ 6,281,453			

As of 8/16/2023

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Federal Programs Manager (Homeless) – Jack O'Connor at 444-3083 or joconnor2@mt.gov
Chief Financial Officer – Jay Phillips at 444-4523 or jphillips3@mt.gov