

# ***BOARD OF PUBLIC EDUCATION MEETING AGENDA***

**July 22-24, 2026  
Montana School Boards Association  
First Floor Boardroom  
863 Great Northern Blvd  
Helena, MT**

# AGENDA

# BOARD OF PUBLIC EDUCATION MEETING AGENDA

July 22-24, 2026  
Montana School Boards Association, First Floor Boardroom  
863 Great Northern Blvd  
Helena, MT

Wednesday, July 22, 2026

10:00AM

*The meeting will not be streamed on YouTube on Wednesday, July 22, 2026.*

## CALL TO ORDER

- A. Pledge of Allegiance
- B. Roll Call
- C. Statement of Public Participation
- D. Welcome Visitors

## ❖ STRATEGIC PLANNING SESSION – Dr. Tim Tharp

10:00AM

### STRATEGIC PLANNING ITEMS – page #10

- REVIEW BYLAWS
- REVIEW COMMITTEE ASSIGNMENTS
- REVIEW 2027 MEETING CALENDAR AND AGENDA CALENDAR
- REVIEW OPEN MEETING LAWS

\*\*\*\*\*LUNCH WITH EDUCATION PARTNERS\*\*\*\*\*

**\*\*Lunch will be provided for Board Members and Ex-Officio Members\*\***

1:00PM

### REVIEW DRAFT STRATEGIC PLANNING ITEMS

1:30PM

### DISCUSS RELATED METRICS FOR SUCCESS

2:00PM

### REVIEW LAYOUT AND FORMATTING

3:00PM

### IDENTIFY STAKEHOLDERS FOR FEEDBACK

3:30PM

### WRAP UP AND NEXT STEPS

## PUBLIC COMMENT ON STRATEGIC PLANNING ITEMS

## RECESS

Thursday, July 23, 2026

8:30AM

## CALL TO ORDER

- A. Pledge of Allegiance
- B. Roll Call
- C. Statement of Public Participation
- D. Welcome Visitors

## PUBLIC COMMENT

*This time will be provided for public comment on items not listed on the agenda. This meeting is open to the public both in person and electronically. For those wishing to give virtual public comment, please contact [bpe@mt.gov](mailto:bpe@mt.gov) to request the Zoom*

link for the meeting. Members of the public who have joined virtually on Zoom may “raise their hand” at the appropriate time to participate after being recognized by the Board Chair. Members of the public who wish to share written public comment with the Board members must submit written public comment to the Executive Director at [bpe@mt.gov](mailto:bpe@mt.gov) no later than two (2) business days before the start of the meeting. Any written public comment received after this deadline will be shared with the Board members after the meeting. All written public comment will be included as part of the official public record.

Action may be taken on any item listed on the Board agenda. Per §2-3-103, MCA, the Board encourages public comment on any item prior to Board final action.

#### CONSENT AGENDA – page #27

(Items may be pulled from Consent Agenda upon request)

- A. May 21-22, 2026 and June 22, 2026 Meeting Minutes
- B. Financials

#### ADOPT AGENDA

##### ❖ REPORTS – Dr. Tim Tharp (Items 1-5)

- Item 1 CHAIRPERSON REPORT – 15 Minutes, page #51  
Dr. Tim Tharp
- Item 2 EXECUTIVE DIRECTOR REPORT – 15 Minutes, page #52  
McCall Flynn
- Item 3 STATE SUPERINTENDENT REPORT – 1 Hour, page #53  
State Superintendent Susie Hedalen
  - Assessment Update
  - Federal Update
  - OPI Staffing Report
  - Content Standards Revision Update
  - Data Modernization Update
- Item 4 COMMISSIONER OF HIGHER EDUCATION REPORT – 15 Minutes, page #72  
Dr. Angela McLean
- Item 5 STUDENT REPRESENTATIVE REPORT – 15 Minutes, page #74  
Lydia Comstock

##### ❖ MSDB COMMITTEE – Lisa Schmidt (Item 6)

- Item 6 MSDB REPORT – 30 Minutes, page #75  
Superintendent Paul Furthmyre
- ACTION ITEMS:
- Action on Personnel Items
  - Action on Pay Increase for Plan 061

\*\*\*\*\*TIME CERTAIN AT 11:15AM\*\*\*\*\*

##### ❖ LICENSURE COMMITTEE – Dr. Ron Slinger (Items 7-11)

- Item 7 ACTION AND INFORMATION ON INITIAL REVIEW OF BPE CASE #2026-04, KNIGHT –  
15 Minutes, page #126  
Brenton Craggs



Item 8                    **ACTION AND INFORMATION ON INITIAL REVIEW OF BPE CASE #2026-06, WHITNEY**  
                              – 15 Minutes, page #127  
                              Brenton Craggs

Item 9                    **ACTION ON THE EDUCATOR PREPARATION PROVIDER ACCREDITATION**  
                              **HANDBOOK – 5 Minutes, page #128**  
                              Crystal Andrews

Item 10                  **ACTION ON THE SITE VISIT AND STATE EXIT REPORT OF THE CARROLL**  
                              **COLLEGE EDUCATOR PREPARATION PROVIDER IN THE DEPARTMENT OF**  
                              **EDUCATION – 5 Minutes, page #163**  
                              Crystal Andrews

Item 11                  **ACTION ON PRAXIS ITEMS – 5 Minutes, page #195**  
                              Crystal Andrews

- Math – Middle School
- English Language Arts – Middle School
- Social Studies – Middle School
- Science – Middle School
- Physical Education
- Health

❖ **ACCREDITATION COMMITTEE – Dr. Hannah Nieskens (Item 12)**

Item 12                  **INFORMATION AND REVIEW OF SPECIAL EDUCATION TECHNICIAN RULEMAKING**  
                              – 30 Minutes, page #199  
                              Dr. Julie Murgel, Patrick Cates

❖ **EXECUTIVE COMMITTEE – Dr. Tim Tharp (Item 13)**

Item 13                  **INFORMATION AND REVIEW OF MONTANA SCHOOL BUS STANDARDS**  
                              **RULEMAKING – 45 Minutes, page #205**  
                              Elsie Workman, OPI; Mike Krout, Majestic Transportation; Neal Ullman, DEQ

\*\*\*\*\*JOINT LUNCH WITH MACIE MEMBERS\*\*\*\*\*

**\*\*Lunch will be provided for Board Members, MACIE Members, and Ex-Officio Members\*\***

\*\*\*\*\*TIME CERTAIN AT 2:00PM\*\*\*\*\*

❖ **JOINT MACIE MEETING AND TRIBAL CONSULTATION – Julia Maxwell (Items 14-17)**

Item 14                  **MACIE REPORT – 15 Minutes, page #343**  
                              Jordann Lankford Forster

Item 15                  **INDIAN EDUCATION FOR ALL REPORT – 1 Hour, page #345**  
                              Christy Mock-Stutz, Dr. Brooke Gondara

Item 16                  **INFORMATION AND UPDATE ON INTENSIVE ASSISTANCE PROCESS – 1 Hour, page**  
                              **#359**  
                              Dr. Julie Murgel, Dr. Brooke Gondara

Item 17                  **WRAP UP AND FINAL THOUGHTS – 15 Minutes, page #371**  
                              Dr. Tim Tharp, Jordann Lankford Forster

**PUBLIC COMMENT ON JOINT MACIE MEETING ITEMS**

**RECESS**

**Friday, July 24, 2026**

**8:30AM**

**CALL TO ORDER**

- A. Pledge of Allegiance
- B. Roll Call
- C. Statement of Public Participation
- D. Welcome Visitors

❖ **CHARTER SCHOOL COMMITTEE – Lisa Schmidt (Items 18-19)**

**Item 18**                    **UPDATE ON COMMUNITY CHOICE SCHOOLS COMMISSION – 15 Minutes, page #373**  
Cathy Kincheloe

**Item 19**                    **ACTION AND INFORMATION ON PUBLIC CHARTER SCHOOL AMENDMENT**  
**REQUEST PROCESS – 15 Minutes, page #424**  
McCall Flynn

❖ **EXECUTIVE COMMITTEE – Dr. Tim Tharp (Items 20-22)**

**Item 20**                    **PRESENTATION ON MONTANA BRIDGED HEALTH ALLIANCE – 30 Minutes, page**  
**#427**  
John Doran

**Item 21**                    **INFORMATION ON THE YOUTH RISK BEHAVIOR SURVEY RESULTS – 30 Minutes,**  
**page #435**  
Sarah Music, Genie Zeeck

**Item 22**                    **ACTION ON THE PROPOSED NOTICE OF PUBLIC HEARING AND TIMELINE**  
**PERTAINING TO RULEMAKING IN ARM TITLE 10, CHAPTER 64, TRANSPORTATION**  
**STANDARDS AND AUTHORIZE FILING OF THE NOTICE WITH THE SECRETARY OF**  
**STATE FOR PUBLICATION IN THE MONTANA ADMINISTRATIVE REGISTER – 5**  
**Minutes, page #485**  
Dr. Tim Tharp

❖ **ARTIFICIAL INTELLIGENCE AND TECHNOLOGY COMMITTEE – Dr. Hannah Nieskens (Item 23)**

**Item 23**                    **PRESENTATION ON ARTIFICIAL TECHNOLOGY GUIDANCE – 30 Minutes, page #491**  
Dr. Jason Nieffer, Montana Digital Academy, Tyler Capece, Lucas Rowsey

❖ **LICENSURE COMMITTEE – Dr. Ron Slinger (Items 24-27)**

**Item 24**                    **ACTION ON THE DRAFT COUNCIL FOR THE ACCREDITATION OF EDUCATOR**  
**PREPARATION MEMORANDUM OF UNDERSTANDING – 15 Minutes, page #492**  
Dr. Julie Murgel, Crystal Andrews

**Item 25**                    **INFORMATION ON THE SITE VISIT AND STATE EXIT REPORT OF THE STONE**  
**CHILD COLLEGE EDUCATOR PREPARATION PROVIDER IN THE DEPARTMENT OF**  
**EDUCATION – 15 Minutes, page #502**  
Crystal Andrews

**Item 26**                    **INFORMATION ON THE APPROVAL OF NEW CURRICULAR PROGRAM FOR**  
**SPECIAL EDUCATION AT THE UNIVERSITY OF MONTANA PHYLLIS J.**  
**WASHINGTON COLLEGE OF EDUCATION – 15 Minutes, page #519**  
Crystal Andrews

Item 27 ACTION ON THE PROPOSED NOTICE OF ADOPTION PERTAINING TO RULEMAKING IN ARM TITLE 10, CHAPTER 57, EDUCATOR LICENSURE STANDARDS – DUAL CREDIT POSTSECONDARY FACULTY LICENSE AND AUTHORIZE FILING OF THE NOTICE WITH THE SECRETARY OF STATE FOR PUBLICATION IN THE MONTANA ADMINISTRATIVE REGISTER – 5 Minutes, page #525  
Dr. Ron Slinger

❖ ASSESSMENT COMMITTEE – Renee Rasmussen (Items 28-29)

Item 28 INFORMATION AND DISCUSSION ON STATEWIDE ASSESSMENT THINK TANK – 15 Minutes, page #528  
Dr. Julie Murgel, Marie Judisch

Item 29 ACTION AND INFORMATION ON THE APPLICATION AND CRITERIA FOR THE LIST OF APPROVED EARLY NUMERACY SCREENING TOOLS – 15 Minutes, page #532  
McCall Flynn

\*\*\*\*\*LUNCH BREAK\*\*\*\*\*

**\*\*Lunch will be provided for Board Members and Ex-Officio Members\*\***

\*\*\*\*\*TIME CERTAIN AT 1:00PM\*\*\*\*\*

❖ ACCREDITATION COMMITTEE – Dr. Hannah Nieskens (Items 30-36)

Item 30 INFORMATION ON FINANCIAL LITERACY AND ECONOMICS AS A GRADUATION REQUIREMENT – 45 Minutes, page #537  
Dr. Carly Urban, Montana State University; Mike Paffhausen, NAIFA; Dr. Julie Murgel

Item 31 INFORMATION ON ACCREDITATION PERFORMANCE FRAMEWORK COLLEGE AND CAREER READINESS METRIC – 15 Minutes, page #549  
Shannon Boswell, Nicole Thuotte

Item 32 INFORMATION ON THE PROPOSED CORRECTIVE PLANS FOR SCHOOLS IN DEFICIENT AND ADVISE STATUS FOR ACCREDITATION – 15 Minutes, page #568  
Crystal Andrews

Item 33 ACCREDITATION UPDATE – 15 Minutes, page #573  
Crystal Andrews

Item 34 ACTION ON THE ACCREDITATION STATUS FOR NEW PUBLIC SCHOOLS – 5 Minutes, page #577  
Crystal Andrews

- Creston 7-8 – Provisional
- Martinsdale Colony – Provisional
- Meadow Lane Colony – Provisional

Item 35 INFORMATION ON OPENING AND CLOSING OF PUBLIC SCHOOLS – 15 Minutes, page #580  
Autumn Warren

Item 36 ACTION ON THE PROPOSED NOTICE OF PUBLIC HEARING AND TIMELINE PERTAINING TO RULEMAKING IN ARM TITLE 10, CHAPTER 55, SPECIAL EDUCATION TECHNICIAN STANDARDS AND AUTHORIZE FILING OF THE NOTICE WITH THE SECRETARY OF STATE FOR PUBLICATION IN THE MONTANA ADMINISTRATIVE REGISTER – 5 Minutes, page #595  
Dr. Hannah Nieskens

## **FUTURE AGENDA ITEMS September 24-25, 2026, Glendive, MT**

Election of Board Officers

Action on Strategic Planning Items

MACIE Update

Montana Digital Academy Update

MACIE Renewal (Even Years)

Review Community Choice School Academic Performance and Financial Reports

*Annual HiSET Report*

*Annual Special Education Report*

*Accreditation Update*

*Assessment Update*

*Federal Update*

*Content Standards Revision Update*

## **PUBLIC COMMENT**

*This time will be provided for public comment on items not listed on the agenda. This meeting is open to the public both in person and electronically. For those wishing to give virtual public comment, please contact [bpe@mt.gov](mailto:bpe@mt.gov) to request the Zoom link for the meeting. Members of the public who have joined virtually on Zoom may "raise their hand" at the appropriate time to participate after being recognized by the Board Chair. Members of the public who wish to share written public comment with the Board members must submit written public comment to the Executive Director at [bpe@mt.gov](mailto:bpe@mt.gov) no later than two (2) business days before the start of the meeting. Any written public comment received after this deadline will be shared with the Board members after the meeting. All written public comment will be included as part of the official public record.*

## **ADJOURN**

*The Montana Board of Public Education is a Professional Development Unit Provider. Attending a Board of Public Education Meeting either in person or via Zoom may qualify you to receive professional development units. Please complete the necessary information on the sign-in sheet if you are applying for professional development units.*

*Agenda items are handled in the order listed on the approved agenda. Items may be rearranged unless listed "time certain". Public comment is welcome on all items listed as "Action" and as noted at the beginning and end of each meeting.*

*The Board of Public Education will make reasonable accommodations for known disabilities that may interfere with an individual's ability to participate in the meeting. Individuals who require such accommodations should make requests to the Board of Public Education as soon as possible prior to the meeting start date. You may write to Kris Stockton, PO Box 200601, Helena MT, 59620, [kmstockton@mt.gov](mailto:kmstockton@mt.gov), 406-444-0302.*

**July 22, 2026**

*The meeting will not be streamed on YouTube on Wednesday, July 22, 2026.*

**CALL TO ORDER**

- A. Pledge of Allegiance**
- B. Roll Call**
- C. Statement of Public Participation**
- D. Welcome Visitors**

# ❖ **STRATEGIC PLANNING SESSION**

**Dr. Tim Tharp**

## **STRATEGIC PLANNING ITEMS**

- **REVIEW BYLAWS**
- **REVIEW COMMITTEE ASSIGNMENTS**
- **REVIEW 2027 MEETING CALENDAR AND AGENDA  
CALENDAR**
- **REVIEW OPEN MEETING LAWS**

**STATE OF MONTANA  
BOARD OF PUBLIC EDUCATION**

**BYLAWS**

**Article I. Name**

The legal name of the Board is the Board of Public Education.

**Article II. Objective**

The objective of the Board is to carry out its constitutional and statutory responsibility to exercise general supervision, in cooperation with the Superintendent of Public Instruction, over the public school system and other such public educational institutions as may be assigned by law.

**Article III. Membership**

The Board consists of seven members appointed by the Governor and confirmed by the Senate. Not more than four may be from each of the two commission districts per § 2-15-156, MCA, and not more than four may be affiliated with the same political party. The Governor, Superintendent of Public Instruction, and Commissioner of Higher Education are ex-officio, non-voting members of the Board. There is also a non-voting student member, appointed by the Montana Association of Student Councils. The term of members appointed to the Board shall be seven years. When a vacancy occurs, the Governor shall appoint a member for the remainder of the term of the incumbent. Members appointed to the Board, before discharging their duties, shall take and subscribe to the constitutional oath of office.

**Article IV. Officers**

The officers of the Board shall consist of a Chairperson and Vice Chairperson. The Chairperson and Vice Chairperson shall be elected among the appointed membership for the period of one year; annual reelection is permissible. Election of the Chairperson and Vice Chairperson shall be conducted by voice vote. The Chairperson-elect and Vice Chairperson-elect shall assume their respective office upon adjournment of the meeting at which they were elected. If the office of the Chairperson or Vice Chairperson is vacated prior to the expiration of the term, the Board will hold an election to fill the vacated office; the newly elected officer will serve for the remainder of the unexpired term and assume the gavel immediately. The duties of the Chairperson shall include presiding at meetings, participating in the construction of meeting agendas, and appointing all committees. The Chairperson shall vote on all matters. In the absence of the Chairperson, the Vice Chairperson shall preside and shall perform such duties as are prescribed for the Chairperson.

## **Article V. Executive Director**

The Board shall appoint, prescribe the term and duties, and establish the salary of the Executive Director. The Executive Director shall serve as administrator to the Board and also as liaison between the Board and the Superintendent of Public Instruction, the Commissioner of Higher Education, the Legislature, and the Governor's office.

## **Article VI. Meetings**

According to § 20-2-112, MCA, the Board shall meet at least quarterly. When necessary, the Board may hold meetings for resolution of specific agenda items either by a meeting in person, virtually, or by a combination of both. Board members shall attend all scheduled meetings in person. If a Board member is unable to attend in person, the chairperson may allow participation virtually.

Special meetings may be called by the Governor, the chairperson of the Board, the Executive Director, or a request in writing of four regular appointed members. In the case of a special meeting, the Executive Director shall provide notice to each regular and ex-officio member at least 48 hours in advance.

The Board of Public Education and the Board of Regents shall meet yearly as the State Board of Education per § 20-2-101, MCA.

Meetings of the Board shall be open to the public. The Chairperson may close the meeting to the public if he or she determines:

- a. That the demand of individual privacy clearly exceeds the merits of public disclosure, or
- b. That an open meeting would have a detrimental effect on the bargaining or the litigating position of the Board.

The Chairperson shall read for the minutes the reason for the closing, or the minutes will show that the person in question requested a closed session.

## **Article VII. Quorum**

A majority of the appointed members shall constitute a quorum for the transaction of business.

## **Article VIII. Organization**

### **Section A. Officers**

The Board shall select, by a majority vote, a Chairperson and Vice Chairperson from its appointed members each September. The term of elected office shall be for one year. The Chairperson shall be the presiding officer and shall preside over all regular, special,



and public meetings of the Board. The Vice Chairperson shall perform the functions of the Chairperson in their absence.

## **Section B. Committees**

Standing committees shall be as follows:

1. An Executive Committee: composed of the Chairperson, Vice Chairperson, and the Executive Director
2. An Accreditation Committee
3. A Licensure Committee
4. A Montana School for the Deaf and Blind Committee
5. A Legislative Committee
6. An Assessment Committee
7. A Charter School Committee

The Board may create special committees as deemed necessary to carry out the responsibilities of the Board. Members of the special committees shall be appointed by the Chairperson.

Duties of the committees shall be to review, report on, and make recommendations concerning any item referred to them and alert the Chairperson and Executive Director on any matters which should be placed on the agenda for Board discussion or action. The Chairperson shall serve as a member of all committees, unless otherwise determined by the Chairperson. The Executive Director shall attend all committee meetings and provide support as determined by the committee chairperson.

The Board shall establish a Montana School for the Deaf and Blind Committee. Due to the uniqueness of the operations of the Montana School for the Deaf and Blind, the Committee is expected to meet more regularly than other committees of the Board. As required under § 20-8-101, MCA, the Montana School for the Deaf and Blind is under general supervision, direction, and control of the Board. This relationship requires more regular oversight and involvement in the maintenance and governance of the school.

## **Article IX. Order of Business**

The regular order of business shall be as follows:

1. Call to Order
2. Pledge of Allegiance
3. Roll Call

4. Statement of Public Participation
5. Welcome Visitors
6. Public Comment
7. Consent Agenda Adoption
8. Agenda Adoption
9. Date and Place of Next Meeting
10. Public Comment
11. Adjournment

#### **Article X. Communications**

All official communications should come to the attention of the Board through the Executive Director of the Board.

#### **Article XI. Parliamentary Procedure**

The Board will use Robert's Rules of Order as a guide on questions of parliamentary procedure.

#### **Article XII. Amendments**

These bylaws may be added to or amended by a majority vote at any meeting of the Board of Public Education provided that a quorum is present and provided that the proposed amendment is sent in writing to members of the Board of Public Education at least seven days in advance.

#### **Article XIII. Professional Development**

The Board of Public Education offers professional development opportunities for Board members whenever possible. Board members may attend at least one professional development conference each year, when funding is available. All requests must be submitted to the Executive Director at least one month prior to the conference. Board members should submit the request using the Request and Justification for Travel Form. All out of state travel and travel that exceeds \$1,000 must be approved by the Executive Committee prior to participation.

[Request and Justification for Travel Form \(mt.gov\)](https://mt.gov/Request-and-Justification-for-Travel-Form)



# Board of Public Education

## Board of Public Education

### Committee Assignments

March 2026

#### STANDING COMMITTEES

##### **Executive Committee**

Tim Tharp, Chair  
Ron Slinger, Vice Chair  
McCall Flynn, Executive Director

##### **Licensure Committee**

Ron Slinger, Chair  
Amanda Mills, Member  
Tim Tharp, Member

##### **Charter School Committee**

Lisa Schmidt, Chair  
Amanda Mills, Member  
Tim Tharp, Member

##### **MSDB Committee**

Lisa Schmidt, Chair  
Julia Maxwell, Member  
Tim Tharp, Member

##### **Legislative Committee**

Renee Rasmussen, Chair  
Ron Slinger, Member  
Tim Tharp, Member

##### **Assessment Committee**

Renee Rasmussen, Chair  
Hannah Nieskens, Member  
Tim Tharp, Member

##### **Accreditation Committee**

Hannah Nieskens, Chair  
Julia Maxwell, Member  
Tim Tharp, Member

#### SPECIAL COMMITTEES

##### **Artificial Intelligence and Technology Committee**

Hannah Nieskens, Chair  
Ron Slinger, Member  
Tim Tharp, Member

#### ADVISORY GROUP LIAISONS

Montana Advisory Council on Indian Education – Julia Maxwell

Montana School Safety Advisory Committee – McCall Flynn

#### OTHER COMMITTEE APPOINTMENTS

Education and Workforce Data Governing Board – Tim Tharp

Montana Digital Academy Governing Board – Hannah Nieskens



# Board of Public Education

## ANNUAL AGENDA CALENDAR

January 2027 – November 2027

*(Proposed items from OPI in italics)*

---

### January 14-15 or 21-22, 2027 – Helena, MT

#### Regents January 6 Helena/Online

Exiting Board Member – Last Meeting & Recognition  
 MACIE Update  
 Review Community Choice School Annual Reports  
 Action on Authorizing Public Charter Schools  
*Transportation Report*  
*Assessment Update*  
*Federal Update*  
*Accreditation Report*  
*Educator Licensure Report*  
*Qualify Advanced Opportunity Grant Applications*  
*Quality Educator Loan Assistance Program Report*  
*Content Standards Revision Update*  
 Action on MSDB Superintendent Contract Extension  
**MSDB Superintendent Performance Evaluation & Contract Extension Discussion**

---

### March 18-19, 2027 – Stevensville, MT

#### Regents March 18 Helena College

MACIE Update  
 Action on MSDB School Calendar  
 Action on Early Literacy Screening Tools (Odd Years)  
 Action on Executing Public Charter School Contracts  
*Assessment Update*  
*Federal Update*  
*Accreditation Report*  
*Annual School Food Services Report*  
*Review Draft CAEP MOU*  
*Content Standards Revision Update*

---

### May 20-21, 2027 – Great Falls, MT

#### Regents May 19-20 Great Falls College MSU

Student Representative – Last Meeting & Recognition  
 MACIE Update  
 Review Public Charter School Performance Reports  
 Action on K-12 Schools Payment Schedule  
*Assessment Update*  
*Accreditation Update*  
 Action on CAEP MOU  
*Federal Update*  
*Content Standards Revision Update*  
 Action on Accreditation Status of All Schools  
**Executive Director Performance Evaluation**

---

### July 14-16 or 21-23, 2027 – Helena, MT

#### Regents July 14 Helena/Online

Joint MACIE Meeting and Tribal Consultation  
 Strategic Planning Meeting  
 MACIE Update  
 Action on MSDB/Golden Triangle Co-op  
*Indian Education for All Report*  
*Assessment Update*  
*Federal Update*  
*OPI Staffing Report*  
*Accreditation Report*  
*Content Standards Revision Update*

---

### September 23-24, 2027 – Lewistown/Havre, MT

#### Regents September 23 Montana Tech

Election of Board Officers  
 Action on Strategic Planning Items  
 MACIE Update  
 Montana Digital Academy Update  
 MACIE Renewal (Even Years)  
 Review Community Choice School Academic Performance and Financial Reports  
*Annual HiSET Report*  
*Annual Special Education Report*  
*Accreditation Update*  
*Assessment Update*  
*Federal Update*  
*Content Standards Revision Update*

---

### November 17-19, 2027 – Missoula, MT

Board of Education Meeting  
 Joint Montana Council of Deans of Education Meeting  
 MACIE Update  
*Assessment Update*  
*Federal Update*  
*Annual Data Collection*  
 Action on Variance to Standards Requests & Renewals  
 Accreditation Report  
 Youth Risk Behavior Survey Update (Odd Years)  
 Annual Professional Development Unit Providers Report  
 Content Standards Revision Update

# Part One – Notice and Opportunity to Be Heard

## Montana Code Annotated 2025

**2-3-101. Legislative intent.** The legislature finds and declares pursuant to the mandate of Article II, section 8, of the 1972 Montana constitution that legislative guidelines should be established to secure to the people of Montana their constitutional right to be afforded reasonable opportunity to participate in the operation of governmental agencies prior to the final decision of the agency.

**History:** En. 82-4226 by Sec. 1, Ch. 491, L. 1975; R.C.M. 1947, 82-4226.

**2-3-102. Definitions.** As used in this part, the following definitions apply:

(1) "Agency" means any board, bureau, commission, department, authority, or officer of the state or local government authorized by law to make rules, determine contested cases, make a decision on development applications, or enter into contracts except:

- (a) the legislature and any branch, committee, or officer thereof;
- (b) the judicial branches and any committee or officer thereof;
- (c) the governor, except that an agency is not exempt because the governor has been designated as a member thereof; or
- (d) the state military establishment and agencies concerned with civil defense and recovery from hostile attack.

(2) "Agency action" means the whole or a part of the adoption of an agency rule, the issuance of a license or order, the award of a contract, the approval of a development application, or the equivalent or denial of any of these.

(3) "Development application" means a formal request submitted to a local government entity to obtain approval for a development proposal pursuant to Title 76, chapter 25, part 3 or 4.

(4) "Rule" means any agency regulation, standard, or statement of general applicability that implements, interprets, or prescribes law or policy or describes the organization, procedures, or practice requirements of any agency. The term includes the amendment or repeal of a prior rule but does not include:

- (a) statements concerning only the internal management of an agency and not affecting private rights or procedures available to the public; or
- (b) declaratory rulings as to the applicability of any statutory provision or of any rule.

**History:** En. 82-4227 by Sec. 2, Ch. 491, L. 1975; amd. Sec. 23, Ch. 285, L. 1977; amd. Sec. 1, Ch. 452, L. 1977; R.C.M. 1947, 82-4227(part); amd. Sec. 1, Ch. 243, L. 1979; amd. Sec. 1, Ch. 555, L. 2025.

**2-3-103. Public participation -- governor to ensure guidelines adopted -- procedures for publishing notice.**

(1) (a) Each agency shall develop procedures for permitting and encouraging the public to participate in agency decisions that are of significant interest to the public. The procedures must ensure adequate notice and assist public participation before a final agency action is taken that is of significant interest to the public.

(b) The agency shall publish an agenda for a meeting, as defined in 2-3-202, as follows:

- (i) if a newspaper of general circulation in the county where the agency is located publishes electronic notices and links to meeting agendas free of charge to the agency on the newspaper's website, the agency shall provide the notice and agenda to the newspaper to post on the newspaper's website;
- (ii) if the agency does not have an option to post notices and links to meeting agendas free of charge, the agency shall provide adequate notice of a meeting by doing at least one of the following:
  - (A) posting a link to the meeting agenda on the agency's primary website; or

(B) posting the agenda on the social media site of the agency.

(c) The agenda must include an item allowing public comment on any public matter that is not on the agenda of the meeting and that is within the jurisdiction of the agency conducting the meeting. However, the agency may not take action on any matter discussed unless specific notice of that matter is included on an agenda and public comment has been allowed on that matter.

(d) Public comment received at a meeting must be incorporated into the official minutes of the meeting, as provided in **2-3-212**.

(e) For purposes of this section, "public matter" does not include contested case and other adjudicative proceedings.

(2) The governor shall ensure that each board, bureau, commission, department, authority, agency, or officer of the executive branch of the state adopts coordinated rules for its programs. The guidelines must provide policies and procedures to facilitate public participation in those programs, consistent with subsection (1). These guidelines must be adopted as rules and published in a manner so that the rules may be provided to a member of the public upon request.

**History:** En. 82-4228 by Sec. 3, Ch. 491, L. 1975; amd. Sec. 24, Ch. 285, L. 1977; amd. Sec. 2, Ch. 452, L. 1977; R.C.M. 1947, 82-4228(1), (5); amd. Sec. 1, Ch. 425, L. 2003; amd. Sec. 1, Ch. 396, L. 2023.

**2-3-104. Requirements for compliance with notice provisions.** An agency is considered to have complied with the notice provisions of **2-3-103** if:

(1) an environmental impact statement is prepared and distributed as required by the Montana Environmental Policy Act, Title 75, chapter 1;

(2) a proceeding is held as required by the Montana Administrative Procedure Act;

(3) an agency adopts and implements the public participation plan required in **76-25-106** for the purposes of agency actions taken in accordance with Title 76, chapter 25;

(4) a public hearing, after appropriate notice is given, is held pursuant to any other provision of state law or a local ordinance or resolution; or

(5) a newspaper of general circulation within the area to be affected by a decision of significant interest to the public has carried a news story or advertisement concerning the decision sufficiently prior to a final decision to permit public comment on the matter.

**History:** En. 82-4228 by Sec. 3, Ch. 491, L. 1975; amd. Sec. 24, Ch. 285, L. 1977; amd. Sec. 2, Ch. 452, L. 1977; R.C.M. 1947, 82-4228(2); amd. Sec. 2, Ch. 555, L. 2025.

**2-3-105. Supplemental notice by radio or television.** (1) An official of the state or any of its political subdivisions who is required by law to publish a notice required by law may supplement the publication by a radio or television broadcast of a summary of the notice or by both when in the official's judgment the public interest will be served.

(2) The summary of the notice must be read without a reference to any person by name who is then a candidate for political office.

(3) The announcements may be made only by duly employed personnel of the station from which the broadcast emanates.

(4) Announcements by political subdivisions may be made only by stations situated within the county of origin of the legal notice unless a broadcast station does not exist in that county, in which case announcements may be made by a station or stations situated in any county other than the county of origin of the legal notice.

**History:** En. Sec. 1, Ch. 149, L. 1963; R.C.M. 1947, 19-201; amd. Sec. 38, Ch. 61, L. 2007.

**2-3-106. Period for which copy retained.** Each radio or television station broadcasting any summary of a legal notice shall for a period of 6 months subsequent to such broadcast retain at its

office a copy or transcription of the text of the summary as actually broadcast, which shall be available for public inspection.

**History:** En. Sec. 2, Ch. 149, L. 1963; R.C.M. 1947, 19-202.

**2-3-107. Proof of publication by broadcast.** Proof of publication of a summary of any notice by radio or television broadcast shall be by affidavit of the manager, an assistant manager, or a program director of the radio or television station broadcasting the same.

**History:** En. Sec. 3, Ch. 149, L. 1963; R.C.M. 1947, 19-203.

**2-3-111. Opportunity to submit views -- public hearings.** (1) Procedures for assisting public participation must include a method of affording interested persons reasonable opportunity to submit data, views, or arguments, orally or in written form, prior to making a final decision that is of significant interest to the public.

(2) When a state agency other than the board of regents proposes to take an action that directly impacts a specific community or area and a public hearing is held, the hearing must be held in an accessible facility in the impacted community or area or in the nearest community or area with an accessible facility.

**History:** En. 82-4228 by Sec. 3, Ch. 491, L. 1975; amd. Sec. 24, Ch. 285, L. 1977; amd. Sec. 2, Ch. 452, L. 1977; R.C.M. 1947, 82-4228(3); amd. Sec. 1, Ch. 487, L. 1997.

**2-3-112. Exceptions.** The provisions of 2-3-103 and 2-3-111 do not apply to:

(1) an agency decision that must be made to deal with an emergency situation affecting the public health, welfare, or safety;

(2) an agency decision that must be made to maintain or protect the interests of the agency, including but not limited to the filing of a lawsuit in a court of law or becoming a party to an administrative proceeding; or

(3) a decision involving no more than a ministerial act.

**History:** En. 82-4228 by Sec. 3, Ch. 491, L. 1975; amd. Sec. 24, Ch. 285, L. 1977; amd. Sec. 2, Ch. 452, L. 1977; R.C.M. 1947, 82-4228(4).

**2-3-113. Declaratory rulings to be published.** The declaratory rulings of any board, bureau, commission, department, authority, agency, or officer of the state which is not subject to the Montana Administrative Procedure Act shall be published and be subject to judicial review as provided under 2-4-623(6) and 2-4-501, respectively.

**History:** En. 82-4227 by Sec. 2, Ch. 491, L. 1975; amd. Sec. 23, Ch. 285, L. 1977; amd. Sec. 1, Ch. 452, L. 1977; R.C.M. 1947, 82-4227(part); amd. Sec. 3, Ch. 184, L. 1979.

**2-3-114. Enforcement -- attorney fees.** (1) The district courts of the state have jurisdiction to set aside an agency decision under this part upon petition of any person whose rights have been prejudiced. A petition pursuant to this section must be filed within 30 days of the date on which the person learns, or reasonably should have learned, of the agency's decision.

(2) A person alleging a deprivation of rights who prevails in an action brought in district court to enforce the person's rights under Article II, section 8, of the Montana constitution may be awarded costs and reasonable attorney fees.

**History:** En. 82-4229 by Sec. 4, Ch. 491, L. 1975; amd. Sec. 25, Ch. 285, L. 1977; R.C.M. 1947, 82-4229; amd. Sec. 1, Ch. 211, L. 2007; amd. Sec. 1, Ch. 266, L. 2015.

# Part Two – Open Meetings

## Montana Code Annotated 2025

**2-3-201. Legislative intent -- liberal construction.** The legislature finds and declares that public boards, commissions, councils, and other public agencies in this state exist to aid in the conduct of the peoples' business. It is the intent of this part that actions and deliberations of all public agencies shall be conducted openly. The people of the state do not wish to abdicate their sovereignty to the agencies which serve them. Toward these ends, the provisions of the part shall be liberally construed.

**History:** En. Sec. 1, Ch. 159, L. 1963; R.C.M. 1947, 82-3401.

**2-3-202. Meeting defined.** As used in this part, "meeting" means the convening of a quorum of the constituent membership of a public agency or association described in 2-3-203, whether corporal or by means of electronic equipment, to hear, discuss, or act upon a matter over which the agency has supervision, control, jurisdiction, or advisory power.

**History:** En. 82-3404 by Sec. 2, Ch. 567, L. 1977; R.C.M. 1947, 82-3404; amd. Sec. 2, Ch. 183, L. 1987

**2-3-203. Meetings of public agencies and certain associations of public agencies to be open to public -- exceptions.** (1) All meetings of public or governmental bodies, boards, bureaus, commissions, agencies of the state, or any political subdivision of the state or organizations or agencies supported in whole or in part by public funds or expending public funds, including the supreme court, must be open to the public.

(2) All meetings of associations that are composed of public or governmental bodies referred to in subsection (1) and that regulate the rights, duties, or privileges of any individual must be open to the public.

(3) The presiding officer of any meeting may close the meeting during the time the discussion relates to a matter of individual privacy and then if and only if the presiding officer determines that the demands of individual privacy clearly exceed the merits of public disclosure. The right of individual privacy may be waived by the individual about whom the discussion pertains and, in that event, the meeting must be open.

(4) (a) Except as provided in subsection (4)(b), a meeting may be closed to discuss a strategy to be followed with respect to litigation when an open meeting would have a detrimental effect on the litigating position of the public agency.

(b) A meeting may not be closed to discuss strategy to be followed in litigation in which the only parties are public bodies or associations described in subsections (1) and (2).

(5) The supreme court may close a meeting that involves judicial deliberations in an adversarial proceeding.

(6) Any committee or subcommittee appointed by a public body or an association described in subsection (2) for the purpose of conducting business that is within the jurisdiction of that agency is subject to the requirements of this section.

**History:** En. Sec. 2, Ch. 159, L. 1963; amd. Sec. 1, Ch. 474, L. 1975; amd. Sec. 1, Ch. 567, L. 1977; R.C.M. 1947, 82-3402; amd. Sec. 1, Ch. 380, L. 1979; amd. Sec. 1, Ch. 183, L. 1987; amd. Sec. 1, Ch. 123, L. 1993; amd. Sec. 1, Ch. 218, L. 2005.

**2-3-211. Recording.** A person may not be excluded from any open meeting under this part and may not be prohibited from photographing, televising, transmitting images or audio by electronic or



digital means, or recording open meetings. The presiding officer may ensure that these activities do not interfere with the conduct of the meeting.

**History:** En. 82-3405 by Sec. 4, Ch. 567, L. 1977; R.C.M. 1947, 82-3405; amd. Sec. 1, Ch. 138, L. 2017.

**2-3-212. Minutes of meetings -- public inspection.** (1) Appropriate minutes of all meetings required by **2-3-203** to be open must be kept and must be available for inspection by the public. If an audio recording of a meeting is made and designated as official, the recording constitutes the official record of the meeting. If an official recording is made, a written record of the meeting must also be made and must include the information specified in subsection (2).

(2) Minutes must include without limitation:

(a) the date, time, and place of the meeting;

(b) a list of the individual members of the public body, agency, or organization who were in attendance;

(c) the substance of all matters proposed, discussed, or decided; and

(d) at the request of any member, a record of votes by individual members for any votes taken.

(3) If the minutes are recorded and designated as the official record, a log or time stamp for each main agenda item is required for the purpose of providing assistance to the public in accessing that portion of the meeting.

(4) Any time a presiding officer closes a public meeting pursuant to **2-3-203**, the presiding officer shall ensure that minutes taken in compliance with subsection (2) are kept of the closed portion of the meeting. The minutes from the closed portion of the meeting may not be made available for inspection except pursuant to a court order.

**History:** En. Sec. 3, Ch. 159, L. 1963; amd. Sec. 3, Ch. 567, L. 1977; R.C.M. 1947, 82-3403; amd. Sec. 1, Ch. 65, L. 2011; amd. Sec. 29, Ch. 348, L. 2015.

**2-3-213. Voidability.** Any decision made in violation of **2-3-203** may be declared void by a district court having jurisdiction. A suit to void a decision must be commenced within 30 days of the date on which the plaintiff or petitioner learns, or reasonably should have learned, of the agency's decision.

**History:** En. 82-3406 by Sec. 5, Ch. 567, L. 1977; R.C.M. 1947, 82-3406; amd. Sec. 2, Ch. 211, L. 2007.

**2-3-214. Recording of meetings for certain boards.** (1) Except as provided in **2-3-203** and subsection (6) of this section, the following boards shall record their public meetings in an audio and video format:

(a) the board of investments provided for in **2-15-1808**;

(b) the public employees' retirement board provided for in **2-15-1009**;

(c) the teachers' retirement board provided for in **2-15-1010**;

(d) the board of public education provided for in Article X, section 9, of the Montana constitution;

(e) the board of regents of higher education provided for in Article X, section 9, of the Montana constitution;

(f) except as provided in subsection (7)(a), the governing board of a county provided for in Title 7, chapter 1, part 21;

(g) except as provided in subsection (7)(b), the governing board of a first-class and second-class city provided for in Title 7, chapter 1, part 41;

(h) a first-class or second-class school district board of trustees provided for in Article X, section 8, of the Montana constitution, **20-6-201**, and **20-6-301**; and

(i) a local board of health provided for in Title 50, chapter 2, part 1.

(2) (a) The boards listed in subsections (1)(a) through (1)(e) shall make the audio and video recordings of meetings under subsection (1) publicly available within 1 business day after the meeting through broadcast on the state government broadcasting service as provided in **5-11-1111** or through publication of streaming audio and video content on the respective board's website.

(b) The boards listed in subsections (1)(f) through (1)(i) shall make the audio and video recordings publicly available within 5 business days after the meeting with a link to the recording on the respective board's website.

(c) The boards listed in subsection (7) shall make the audio recording publicly available within 14 business days after the meeting with a link to the recording on the respective board's website.

(d) If a board listed in subsections (1)(f) through (1)(i) and (7) does not maintain a website, it shall maintain a social media page and provide a link to the recording on the social media page.

(e) The department of administration may develop a memorandum of understanding with the legislative services division for broadcasting executive branch content on the state government broadcasting service or live-streaming audio or video executive branch content over the internet.

(3) For the boards listed in subsections (1)(f) through (1)(i) that maintain minutes as required by **2-3-212**, the audio and video recordings created pursuant to this section are not required to be the official record of the meeting. If a recording is not designated as the official record, the recording may be destroyed after being retained online for 1 year and is not subject to the requirements of Title 2, chapter 6, for public information requests.

(4) A board is not required to disrupt or reschedule a meeting if there is a technological failure of the meeting recording. If the recording is not able to be made available online, the board shall prominently post a notice in the same manner as a notice of a public meeting and shall post a notice at all locations where the meeting recording links are available. The notice must explain the reason the meeting was not recorded and describe the steps taken to remedy the failure prior to the next meeting.

(5) The requirements of this section apply only when a board is acting on a matter over which the board has supervision, control, jurisdiction, or advisory power at a public meeting as defined in **2-3-202** that has been publicly noticed as required by **2-3-103**.

(6) The requirements of this section do not apply to a board listed in subsection (1)(f) when a quorum is incidentally established as described in **7-5-2122**(4) and (5) solely on the basis of sharing a common office space.

(7) The following boards must meet the requirements of this section, except that meetings may be recorded, retained, and made available in audio format only:

(a) the governing board of a county with a population of less than 4,500; and

(b) the governing board of a third-class city or a town with a population greater than 300.

(8) Expenditures by a school district on staff, consultants, equipment, software licenses, storage, or security made to fulfill the requirements of this section qualify as a school facility project under **20-9-525**.

**History:** En. Sec. 1, Ch. 133, L. 2015; amd. Sec. 1, Ch. 741, L. 2023; amd. Sec. 1, Ch. 271, L. 2025.

**2-3-221. Costs to prevailing party in certain actions to enforce constitutional right to know.** A person alleging a deprivation of rights who prevails in an action brought in district court to enforce the person's rights under Article II, section 9, of the Montana constitution may be awarded costs and reasonable attorney fees.

**History:** En. 93-8632 by Sec. 1, Ch. 493, L. 1975; R.C.M. 1947, 93-8632; amd. Sec. 39, Ch. 61, L. 2007; amd. Sec. 30, Ch. 348, L. 2015.

# Part Three – Use of Electronic Mail Systems

## Montana Code Annotated 2025

**2-3-301. Agency to accept public comment electronically -- dissemination of electronic comments address and documents required -- fees prohibited.** (1) An agency that accepts public comment pursuant to a statute, administrative rule, or policy, including an agency adopting rules pursuant to the Montana Administrative Procedure Act or an agency to which **2-3-111** applies, shall provide for the receipt of public comment electronically.

(2) As part of the agency action required by subsection (1), an agency shall disseminate by appropriate media the address to which public comment may be made, including dissemination in:

- (a) rulemaking notices published pursuant to the Montana Administrative Procedure Act;
- (b) the telephone directory of state agencies published by the department of administration;
- (c) any notice of agency existence, purpose, and operations published on the internet; or
- (d) any combination of the methods of dissemination provided in subsections (2)(a) through (2)(c).

(3) An agency shall, at the request of another agency or person and subject to **2-6-1003**, disseminate the electronic documents to that agency or person by electronic mail in place of surface mail.

Notification of the availability of an electronic notice of proposed rulemaking may be sent to an interested person as provided in **2-4-302**. An agency may not charge a fee for providing documents by electronic mail in accordance with this subsection.

(4) An agency that receives electronic comments pursuant to subsection (1) shall retain the electronic comments as either an electronic or a paper copy to the same extent that other comments are retained.

(5) As used in this section, "agency" means a department, division, bureau, office, board, commission, authority, or other agency of the executive branch of state government.

**History:** En. Sec. 1, Ch. 484, L. 1999; amd. Sec. 1, Ch. 77, L. 2001; amd. Sec. 19, Ch. 313, L. 2001; amd. Sec. 1, Ch. 41, L. 2011; amd. Sec. 31, Ch. 348, L. 2015; amd. Sec. 2, Ch. 695, L. 2025.

## **STRATEGIC PLANNING ITEMS**

|               |                                              |
|---------------|----------------------------------------------|
| <b>1:00PM</b> | <b>REVIEW DRAFT STRATEGIC PLANNING ITEMS</b> |
| <b>1:30PM</b> | <b>DISCUSS RELATED METRICS FOR SUCCESS</b>   |
| <b>2:00PM</b> | <b>REVIEW LAYOUT AND FORMATTING</b>          |
| <b>3:00PM</b> | <b>IDENTIFY STAKEHOLDERS FOR FEEDBACK</b>    |
| <b>3:30PM</b> | <b>WRAP UP AND NEXT STEPS</b>                |

**PUBLIC COMMENT ON STRATEGIC PLANNING ITEMS**



# Board of Public Education

## Strategic Planning Timeline

### September 11–12, 2025 | Board Meeting – Kickoff

- Presentation on strategic planning timeline and process.
- Review project plan, roles, and expectations.
- **Output:** Confirm process, timeline, and stakeholder engagement plan.

### October–December 2025 | Pre-Engagement Phase (Between Meetings)

- Gather baseline information and data for priority areas.
- Identify and outreach to key stakeholders.

### January 15–16, 2026 | Board Meeting – Mission & Vision

- Review mission statement.
- Discuss and draft vision statement.
- **Pre-Reading:** NASBE *Roadmap to Excellence* - Strategic Planning for State Boards and NASBE Policy Update - New State Strategic Plans Zero In on Learning Recovery
- **Output:** Draft vision statement.

### February–March 2026 | (Between Meetings)

- Follow up from January Board Meeting.
- Prepare draft vision statement.

### March 19–20, 2026 | Board Meeting – Vision & Commitments

- Review and refine vision statement.
- Discuss commitments and initial strategic priorities.
- **Pre-Reading:** Goals and commitments adopted by other states.
- **Output:** Final vision statement.

### April–May 2026 | (Between Meetings)

- Follow up from March Board Meeting.
- Prepare commitments and initial strategic priorities.

### May 21–22, 2026 | Board Meeting – Commitments & Priorities

- Review commitments and initial strategic priorities.
- Identify 1–2 critical issues per priority.
- Establish related goals and metrics of success.
- **Output:** Draft monitoring/accountability framework.

### June–July 2026 | Draft Development (Between Meetings)

- Follow up from May Board Meeting.
- Prepare related goals and metrics of success.

### July 22–24, 2026 | Board Meeting – Draft Review & Feedback

- Review first draft of strategic plan.
- **Output:** Give direction for revisions.

### August–Early September 2026 | Draft Development Cont. (Between Meetings)

- Follow up from July Board Meeting.
- Continue draft development and revisions.
- Outreach to stakeholders for feedback.

### September 24–25, 2026 | Board Meeting – Strategic Plan Adoption

- Review final draft, incorporating public comment and stakeholder feedback.
- **Output:** Final Strategic Plan.



**July 23, 2026**

**CALL TO ORDER**

- A. Pledge of Allegiance**
- B. Roll Call**
- C. Statement of Public Participation**
- D. Welcome Visitors**

## **CONSENT AGENDA**

Items may be pulled from Consent Agenda if requested

- A. May 21-22, 2026, and June 22, 2026,  
Meeting Minutes**
- B. Financials**

# **CONSENT AGENDA**

## **MINUTES**



# BOARD OF PUBLIC EDUCATION MEETING MINUTES

May 21-22, 2026  
Montana School for the Deaf and Blind  
3911 Central Ave  
Great Falls, MT

Thursday, May 21, 2026  
8:30AM

## CALL TO ORDER

Chair Tim Tharp called the meeting to order at 8:30 AM. MSDB students led the Board in the Pledge of Allegiance, Ms. Kris Stockton took Roll Call, the Chair read the Statement of Public Participation and welcomed guests.

Board members: Dr. Tim Tharp, Chair; Dr. Ron Slinger, Vice Chair; Dr. Hannah Nieskens; Ms. Lisa Schmidt; Ms. Julia Maxwell; Ms. Renee Rasmussen; Ms. Amanda Mills; Ms. Lydia Comstock, Student Representative. Ex Officio members: State Superintendent Susie Hedalen, Office of Public Instruction (OPI); Dr. Angela McLean, Office of Commissioner of Higher Education (OCHE). Staff: Ms. McCall Flynn, Executive Director; Ms. Kris Stockton, Administrative Specialist; Ms. Julie Balsam, Administrative Assistant; Mr. Rich Batterman, Board Legal Counsel. Guests: Superintendent Paul Furthmyre, Montana School for the Deaf and Blind (MSDB); Ms. Jordann Lankford Forster Montana Advisory Council on Indian Education (MACIE); Ms. Cedar Rose, OPI; Ms. Marie Judisch, OPI; Dr. Julie Murgel, OPI; Ms. Christy Mock-Stutz, OPI; Ms. Crystal Andrews, OPI; Ms. Kim Popham, Montana Federation of Public Employees (MFPE); Dr. Rob Watson, School Administrators of Montana (SAM); Ms. Kristi Steinberg, University of Montana (UM); Deputy Superintendent Craig Barringer, OPI; Ms. Kimberly Evans, OPI; Dr. Joe Helbling, Carroll College; Ms. Tyler Capece, OPI; Ms. Ellery Bresler, OPI; Superintendent Sarah Eyer, Jefferson Public Schools; Superintendent Chris Hess, Stanford Public Schools; Mr. Jim Kelly, MSDB; Ms. Alissa Kline, MSDB; Ms. McKenna Gregg, OPI; Mr. Dylan Klapmeier, OPI; Dr. Jeril Hehn, Billings Public Schools.

## PUBLIC COMMENT

No public comment was made.

## CONSENT AGENDA

Board member Rasmussen moved to approve the Consent Agenda. Motion seconded by Vice Chair Slinger.

*No discussion. Motion passed unanimously.*

## ADOPT AGENDA

Board member Maxwell moved to approve the Consent Agenda. Motion seconded by Board member Rasmussen.

*No discussion. Motion passed unanimously.*

## ❖ REPORTS – Dr. Tim Tharp (Items 1-5)

### Item 1

#### CHAIRPERSON REPORT Dr. Tim Tharp

Chair Tim Tharp welcomed Board members to Great Falls and thanked MSDB for hosting the Board. Chair Tharp reviewed meetings and conferences he has attended since the March Board meeting and noted that he is currently enrolled in an American Sign Language Class. Chair Tharp welcomed new member, Amanda Mills who introduced herself to the Board.

**Item 2 EXECUTIVE DIRECTOR REPORT – 00:01:04**  
**McCall Flynn**

Ms. McCall Flynn reviewed the recent Public Charter School visits and noted that the Board has made a budget request for a Full-Time position for the Public Charter School Program Officer.

**Item 3 STATE SUPERINTENDENT REPORT – 00:03:15**  
**State Superintendent Susie Hedalen**

Superintendent Susie Hedalen updated the Board on OPI activities, highlighted Purple Star Schools, recent school visits, collaborations with OCHE, and OPI staff participation in Montana Association of School Superintendent meetings. Superintendent Hedalen announced the upcoming Summer Institute and School Safety Grant awards and answered Board members' questions.

Content Standards Update: Ms. Marie Judisch presented a Content Standards Update, announced when the Content Standards Roadshow is scheduled, and answered Board members' questions.

Assessment Report: Ms. Cedar Rose updated the Board on OPI's statewide MAST testing meetings with educators. Ms. Marie Judisch discussed statewide professional learning and training before reviewing the MAST Science Pilot program and answered Board members' questions.

Federal Report: Superintendent Susie Hedalen presented the Federal Update and Dr. Julie Murgel discussed Chapter 55 negotiated rulemaking due to the newly created Class 9 Special Education Technician License. Dr. Murgel reviewed the court finding pertaining to students' graduating with Individualized Education Plan goals.

**Item 4 COMMISSIONER OF HIGHER EDUCATION REPORT – 00:41:17**  
**Dr. Angela McLean**

Dr. Angela McLean thanked the Board and Superintendent Hedalen for the revisions to the Class 8 Dual Credit License and noted that OCHE created a guidance document for educators. Dr. McLean discussed embedding apprenticeships in the Teacher Residency Program, reviewed an itinerary for the Rural Lab Listening sessions, and highlighted the new Miles City Traffic Education Program designed to provide expanded statewide access. Dr. McLean concluded by answering Board members' questions.

**Item 5 STUDENT REPRESENTATIVE REPORT – 00:53:23**  
**Lydia Comstock**

Ms. Lydia Comstock provided an update on changes at the Montana Association of Student Councils then reviewed cell phone bans in schools across the state.

❖ **MACIE LIAISON – Julia Maxwell (Item 6)**

**Item 6 MACIE REPORT – 01:05:23**  
**Jordann Lankford Forster**

Ms. Jordann Lankford Forster reviewed the May 6, 2026, MACIE meeting and updates, presented an overview of the Imagination Library Program, and approval of a draft letter for the national American Indian Student Bill of Rights. Ms. Forster thanked the Board and Superintendent Hedalen for their work and noted the upcoming Joint MACIE and Board meeting in July.

❖ **MSDB COMMITTEE – Lisa Schmidt (Item 7)**

**Item 7 MSDB REPORT – 01:31:52**  
**Superintendent Paul Furthmyre**

MSDB Staff presented updates on Belt Canes, the Journey of a Learner program, and Cottage renovations. Superintendent Paul Furthmyre reviewed the MSDB Report and the action items in the agenda packet before requesting Board approval. Superintendent Furthmyre answered Board members' questions.

**Board member Schmidt moved to approve the MSDB Out of State Travel Requests as listed in the agenda packet. Motion seconded by Board member Rasmussen.**

***No discussion. Motion passed unanimously.***

**Board member Schmidt moved to approve the MSDB Personnel Items as listed in the Agenda Packet. Motion seconded by Board member Maxwell.**

***No discussion. Motion passed unanimously.***

**Board member Schmidt moved to approve the Golden Triangle Curriculum Consortium Membership as listed in the agenda packet. Motion seconded by Board member Rasmussen.**

***Board member Schmidt noted the benefits of membership in the consortium.***

***No further discussion. Motion passed unanimously.***

**Board member Schmidt moved to approve the MHSA Dues and Fees for the MSDB as listed in the agenda packet. Motion seconded by Board member Maxwell.**

***No discussion. Motion passed unanimously.***

❖ **LICENSURE COMMITTEE – Dr. Ron Slinger (Items 8-13)**

**Item 8                      ACTION ON THE UNIVERSITY OF MONTANA EDUCATOR PREPARATION PROGRAM  
GOOD CAUSE EXTENSION REQUEST – 03:45:54  
Crystal Andrews**

Ms. Crystal Andrews reviewed the rationale for the one semester Good Cause Extension request from the University of Montana Educator Preparation Program.

**Vice Chair Slinger moved to approve the Good Cause Extension Request for the University of Montana Educator Preparation Program. Motion seconded by Board member Schmidt.**

***No discussion. Motion passed unanimously.***

**Item 9                      INFORMATION ON THE SITE VISIT AND STATE EXIT REPORT OF THE CARROLL  
COLLEGE EDUCATOR PREPARATION PROVIDER IN THE DEPARTMENT OF  
EDUCATION – 03:49:48  
Crystal Andrews**

Ms. Crystal Andrews presented the State Exit Report for the Carroll College Educator Preparation Program and noted this will be an action item at the July 2026 Board meeting. Dr. Joe Helbling discussed the rejoinder and Ms. Andrews answered Board members' questions.

**Item 10                    INFORMATION ON THE EDUCATOR PREPARATION PROVIDER ACCREDITATION  
HANDBOOK – 03:56:03  
Crystal Andrews**

Ms. Crystal Andrews presented a draft of the Educator Preparation Provider Accreditation Handbook created to assist Educator Preparation programs with the accreditation process. Vice Chair Slinger and Chair Tharp complimented Ms. Andrews on the handbook and extended their appreciation for creating the handbook.

**Item 11                    INFORMATION ON PRAXIS ITEMS – 04:01:05  
Crystal Andrews**

Ms. Crystal Andrews reviewed the six Praxis tests new to Montana. These tests address requests from educators across the state to add new endorsements in Math-Middle School, English Language Arts-Middle School, Social Studies-Middle School, Physical Education, and Health. Ms. Andrews reviewed the recommended scores for each test, outlined the review process by the Praxis Working Group, and noted that this will be an action item at the July 2026 Board meeting. Ms. Andrews answered Board members' questions.

**Item 12                    REVIEW OF CLASS 8 LICENSURE PROPOSAL – 04:12:24  
Dr. Ron Slinger**

Vice Chair Ron Slinger noted that an increase in Dual Credit enrollment has driven the need to revise the Class 8 Post-Secondary Dual Credit license. Ms. McCall Flynn reviewed the proposed license revisions and Superintendent

Susie Hedalen and Dr. Angela McLean discussed the need for the updates. Ms. Flynn outlined the proposed timeline for rule revisions and adoption and answered Board members' questions.

**Item 13                                    DISCUSSION ON THE DRAFT COUNCIL FOR THE ACCREDITATION OF EDUCATOR PREPARATION MEMORANDUM OF UNDERSTANDING – 04:29:58**  
**Dr. Julie Murgel and Crystal Andrews**

Ms. Crystal Andrews reviewed the draft Memorandum of Understanding (MOU) with the Council for the Accreditation of Educator Preparation (CAEP), and noted which schools elect to have joint state accreditation and CAEP accreditation. Dr. Julie Murgel outlined the proposed revisions, answered Board members' questions, and focused specifically on the choice of a one-year or multi-year MOU. Vice Chair Ron Slinger proposed that the Board Licensure Committee meet to review options.

❖ **ACCREDITATION COMMITTEE – Dr. Hannah Nieskens (Items 14-15)**

**Item 14                                    INFORMATION ON THE ACCREDITATION STATUS FOR NEW AND REOPENING PUBLIC SCHOOLS – 04:47:28**  
**Crystal Andrews**

Ms. Crystal Andrews reviewed the timeline and accreditation process for three schools that have requested provisional accreditation: Creston 7-8, Martinsdale Colony, and Meadow Lane Colony. Ms. Andrews discussed the accreditation process for each school and noted that Basin Elementary has requested reinstatement and that action on the request is scheduled for the next day. Ms. Andrews and Dr. Julie Murgel answered Board members' questions.

**Item 15                                    INFORMATION ON THE PROPOSED PROCEDURES AND SCHEDULES FOR REVIEWING THE ACCREDITATION STATUS OF EACH SCHOOL – STUDENT PERFORMANCE STANDARDS – 04:59:18**  
**Dr. Julie Murgel and Crystal Andrews**

Ms. Crystal Andrews reviewed the 2027-2029 proposed procedures and schedules for Student Performance Standards for accreditation. Ms. Andrews and Dr. Julie Murgel answered Board members' questions.

❖ **ASSESSMENT COMMITTEE – Renee Rasmussen (Item 16)**

**Item 16                                    INFORMATION AND RECOMMENDATIONS ON MODIFICATIONS TO THE SINGLE SYSTEM OF STATEWIDE ASSESSMENT – MATH AND ENGLISH LANGUAGE ARTS – 05:46:41**  
**Dr. Julie Murgel and Cedar Rose**

Ms. Cedar Rose presented an overview of the MAST Single System of Statewide Assessment for Math and English Language Arts. Ms. Rose reviewed test results and performance reports available to educators, as well as specific information parents can access.

The Board recessed at 4:01 PM.

**Friday, May 22, 2026**  
**8:30AM**

**CALL TO ORDER – 00:00:07**

Chair Tim Tharp called the meeting to order at 8:30 AM. MSDB students led the Board in the Pledge of Allegiance, Ms. Kris Stockton took Roll Call, the Chair read the Statement of Public Participation and welcomed guests.

Board members: Dr. Tim Tharp, Chair; Dr. Ron Slinger, Vice Chair; Dr. Hannah Nieskens; Ms. Lisa Schmidt; Ms. Julia Maxwell; Ms. Renee Rasmussen; Ms. Amanda Mills; Ms. Lydia Comstock, Student Representative. Ex Officio members: Ms. Tyler Capece, Assistant Deputy Chief of Staff; Dr. Angela McLean, Office of Commissioner of Higher Education. Staff: Ms. McCall Flynn, Executive Director; Ms. Kris Stockton, Administrative Specialist; Ms. Julie Balsam, Administrative Assistant; Ms. Cathy Kincheloe, Director of Planning, Community Choice Schools Commission; Mr. Rich Batterman, Board Legal Counsel. Guests: Ms. Kim Popham, MFPE; Dr. Rob Watson, SAM; Ms. Kristi Steinberg, UM; Ms. Christy Mock-Stutz, OPI; Dr. Julie Murgel, OPI; Ms. Autumn Warren, OPI; Ms. Jackie Ronning, OPI; Ms. Jen Stein, Principal, Edgerton Elementary; Ms. Michelle Hughes, Assistant Superintendent Sara Cole, Kalispell Public Schools; Ms. Cedar Rose, OPI; Mr. Dylan Klapmeier, OPI; Ms. McKenna Gregg, OPI; Superintendent Pax Haslem, Stanford Public Schools; Superintendent Victoria Falls Down, Lame Deer Public

Schools (LDPS); Ms. Courtney Small, LDPS; Mr. Matthew Joley, Principal, LDPS; Ms. Marie Judisch, OPI; Mr. Brad Mikonen; Representative Jane Weber, HD19.

❖ **EXECUTIVE COMMITTEE – Dr. Tim Tharp (Item 18)**

**Item 18**                      **ACTION ON THE K-12 SCHOOL PAYMENT SCHEDULE – 00:08:48**  
**Autumn Warren**

Ms. Autumn Warren presented the K-12 Payment Schedule for the 2026-2027 school year and answered Board members' questions.

**Board member Schmidt moved to approve the K-12 School Payment Schedule as presented.**  
**Motion seconded by Board member Maxwell.**

***No discussion. Motion passed unanimously.***

❖ **CHARTER SCHOOL COMMITTEE – Lisa Schmidt (Items 19-23)**

**Item 19**                      **UPDATE ON COMMUNITY CHOICE SCHOOLS COMMISSION – 00:12:04**  
**Cathy Kincheloe**

Ms. Cathy Kincheloe presented the Performance Framework drafted by the Commission and answered Board members' questions.

**Item 20**                      **UPDATE ON PUBLIC CHARTER SCHOOL SITE VISITS AND BASIC ENTITLEMENTS – 00:29:08**  
**McCall Flynn**

Ms. McCall Flynn reviewed the site visits conducted at the five new Public Charter Schools for the 2025-2026 school year. Ms. Flynn outlined the legal requirements needed to receive a basic entitlement, shared programs and feedback from the schools, and answered Board members' questions.

**Item 21**                      **REVIEW AND DISCUSSION OF PUBLIC CHARTER SCHOOL DOCUMENTS – 00:54:02**  
**McCall Flynn**

Ms. McCall Flynn shared the revised Public Charter School Application and Evaluation Criteria for the 2026-2027 application cycle. Ms. Flynn collected feedback from Board members about the proposed changes and answered members questions.

**Item 22**                      **INFORMATION AND ACTION ON PUBLIC CHARTER SCHOOL INTERVENTION PROCESS – 01:13:16**  
**McCall Flynn**

Ms. McCall Flynn reviewed the proposed Public Charter School Intervention Process and answered Board members' questions.

**Board member Schmidt moved to approve the Public Charter School Intervention Process.**  
**Motion seconded by Board member Maxwell.**

**Dr. Hannah Nieskens amended the motion so that performance monitoring is not tied to time as the only indicator of need. Motion seconded by Board member Rasmussen.**

***No discussion. Motion passed unanimously.***

***Back to original motion to approve the Public Charter School Intervention Process.***

***No discussion. Motion passed unanimously.***

**Item 23**                      **REVIEW PUBLIC CHARTER SCHOOL ANNUAL PERFORMANCE REPORTS – 01:22:59**  
**McCall Flynn**

Ms. McCall Flynn reviewed the compiled Public Charter School Annual Performance Reports for the Board and answered members' questions.

❖ **LICENSURE COMMITTEE – Dr. Ron Slinger (Items 24-25)**

- Item 24                    **ACTION ON THE PROPOSED NOTICE OF PUBLIC HEARING AND TIMELINE PERTAINING TO RULEMAKING IN ARM TITLE 10, CHAPTER 57, EDUCATOR LICENSURE STANDARDS AND AUTHORIZE FILING OF THE NOTICE WITH THE SECRETARY OF STATE FOR PUBLICATION IN THE MONTANA ADMINISTRATIVE REGISTER – 01:29:56**  
**Dr. Ron Slinger**

*Vice Chair Slinger moved to approve the proposed Notice of Public Hearing and Timeline pertaining to rulemaking in ARM Title 10, Chapter 57, Educator Licensure Standards and authorize filing of the notice with the Secretary of State for publication in the Montana Administrative Register. Motion seconded by Board member Rasmussen.*

*Public comment from Dr. Rob Watson about background checks for university faculty are different than background checks for K-12 educators.*

*Public comment from Ms. Tyler Capece that OPI is working with OCHE on the background checks.*

*Public comment from Dr. Angela McLean that OCHE is working with the schools and OPI.*

*No further discussion. Motion passed unanimously.*

- Item 25                    **ACTION ON THE SUPERINTENDENT’S RECOMMENDATION ON THE ANNUAL AND FILING FEE AMOUNTS FOR THE CLASS 9 SPECIAL EDUCATION TECHNICIAN LICENSE – 01:37:57**  
**Crystal Andrews**

*Vice Chair Slinger moved to approve the Annual and Filing Fee amounts for the Class 9 Special Education Technician License as recommended by the State Superintendent. Motion seconded by Board member Schmidt.*

*Public comment from Dr. Rob Watson that the Class 9 License is not currently in the STARS Act and noted this will be brought forward at the next Legislative session.*

*Public comment from Ms. Kim Popham that MFPE has begun advocating for the Class 9 License to be added to the STARS Act.*

*No further discussion. Motion passed unanimously.*

❖ **ACCREDITATION COMMITTEE – Dr. Hannah Nieskens (Items 26-29)**

- Item 26                    **ACTION ON WAIVING THE DEFICIENCY DEVIATION IN ARM 10.55.605 FOR NONLICENSED OR MISASSIGNED DUAL CREDIT EDUCATORS – 01:43:43**  
**Dr. Julie Murgel and Crystal Andrews**

Dr. Julie Murgel reviewed the proposed request and answered Board members' questions. Vice Chair Ron Slinger thanked the OPI for their work to resolve this issue.

*Dr. Hannah Nieskens moved to approve waving the deficiency deviation in ARM 10.55.605 for nonlicensed or misassigned dual credit educators. Motion seconded by Vice Chair Slinger.*

*Board member Rasmussen questioned if the one year is for 2025-2026 or 2026-2027.*

*Motion revised: Dr. Hannah Nieskens moved to approve waving the deficiency deviation in ARM 10.55.605 for nonlicensed or misassigned dual credit educators for the 2025-2026 school year. Motion seconded by Board member Rasmussen.*



*No discussion. Motion passed unanimously.*

**Item 27                      ACTION ON REINSTATEMENT OF ACCREDITATION STATUS FOR REOPENING  
BASIN ELEMENTARY SCHOOL – 01:50:12  
Crystal Andrews**

Ms. Crystal Andrews reviewed the request from Basin Elementary to reopen for the 2026-2027 school year.

**Dr. Hannah Nieskens moved to approve reinstating Basin Elementary School's regular accreditation status. Motion seconded by Board member Rasmussen.**

*No discussion. Motion passed unanimously.*

**Item 28                      ACTION ON THE PROPOSED PROCEDURES AND SCHEDULES FOR REVIEWING  
THE ACCREDITATION STATUS OF EACH SCHOOL – 01:53:07  
Crystal Andrews**

Ms. Crystal Andrews presented the proposed procedures and schedules for the evaluation of school's accreditation status for the next three years. Ms. Andrews answered Board members' questions.

**Dr. Hannah Nieskens moved to approve the proposed procedures and schedules for reviewing the accreditation status of each school. Motion seconded by Vice Chair Slinger.**

***Public comment from Dr. Rob Watson who thanked OPI and the Accreditation Think Tank for their work. Dr. Watson stated the new procedures will be helpful for new principals.***

*No discussion. Motion passed unanimously.*

**Item 29                      ACTION ON THE ACCREDITATION STATUS OF ALL SCHOOLS – 02:00:00  
Crystal Andrews**

Ms. Crystal Andrews shared the Accreditation Status Report, outlined the process to gather data, and stated that only schools in "advice" or "deficiency" status were reviewed. Ms. Andrews answered Board members' questions.

**Dr. Hannah Nieskens moved to approve the Accreditation Status of all Schools as recommended by the State Superintendent. Motion seconded by Board member Maxwell.**

*No discussion. Motion passed unanimously.*

**❖ ASSESSMENT COMMITTEE – Renee Rasmussen (Item 30)**

**Item 30                      ACTION ON LISTING THE SUPERINTENDENT'S RECOMMENDATIONS ON  
MODIFICATIONS TO THE SINGLE SYSTEM OF STATEWIDE ASSESSMENT – MATH  
AND ENGLISH LANGUAGE ARTS AS AN ACTION ITEM ON THE JULY BOARD  
MEETING AGENDA – 02:36:47  
Renee Rasmussen**

**Board member Rasmussen moved to list the Superintendent's recommendations on modifications to the Single System of Statewide Assessment for Math and English Language Arts as an action item on the July 2026 Board meeting agenda. Motion seconded by Vice Chair Slinger.**

***Chair Tharp noted that he is inclined to call a Special Meeting in June to act before the July meeting.***

***Board member Rasmussen referenced the ARM rule that states the Board must approve the Statewide Assessment Tool.***

***Public comment from Dr. Rob Watson who asked the Board to remember that students across the state are impacted by the Statewide Assessment and discussed the impacts on students, teachers, and administrators.***

*Public comment from Ms. Kim Popham who echoed Dr. Watson's points and noted that she has heard from teachers across the state that the assessment does not work.*

*Public comment from Ms. Sara Cole who provided perspective on MAST from the Kalispell School District.*

*Public comment from Mr. Brad Mikonon on the numerous testlets given throughout the year.*

*Public comment from Ms. Jen Stein on how MAST is administered at Edgerton Elementary School in Kalispell.*

*Ms. Tyler Capece expressed the OPI's appreciation for the comments. Ms. Capece noted that the Superintendent shared many of the same concerns while she was in the field and emphasized that OPI is eager to collaborate with schools. Ms. Capece presented data to the Board about the parent portal, the Indian Education for All component, and the inclusion of educators in the process.*

*Vice Chair Ron Slinger noted the report indicates 35% of districts and 4% of parents participated in the portal.*

*Board member Rasmussen stated the Board must separate testing from particulars of this test.*

*Ms. Tyler Capece stated that students have reported positive feedback.*

*Dr. Hannah Nieskens requested the Board be able to review the report before July and Dr. Julie Murgel stated the results can be sent to the Board.*

*Board member Schmidt asked if teachers could set their own windows.*

*Dr. Nieskens stated a survey was sent to parents and teachers and the Board should see those results. Ms. Capece stated that will be made available to the Board.*

*No further discussion. Motion passed unanimously.*

#### **FUTURE AGENDA ITEMS July 22-24, 2026, Helena, MT – 03:12:09**

Joint MACIE Meeting and Tribal Consultation  
Strategic Planning Meeting  
MACIE Update  
Action on MSDB/Golden Triangle Co-op  
Indian Education for All Report  
Assessment Update  
Federal Update  
OPI Staffing Report  
Accreditation Report  
Content Standards Revision Update

#### **PUBLIC COMMENT – 03:12:59**

Dr. Rob Watson gave public comment expressing appreciation to Executive Director Flynn, announced the upcoming SAM Leadership conference at Carroll College, and disseminated information from the Superintendent Lab out of the University of Texas.

\*\*\*\*\*CLOSED SESSION\*\*\*\*\*

#### **❖ EXECUTIVE COMMITTEE – Dr. Tim Tharp (Item 17)**

#### **Item 17 EXECUTIVE DIRECTOR PERFORMANCE EVALUATION Dr. Tim Tharp**



\*\*\*\*\*OPEN SESSION\*\*\*\*\*

## ADJOURN

Adjourned at 12:15PM

*The Montana Board of Public Education is a Professional Development Unit Provider. Attending a Board of Public Education Meeting either in person or via Zoom may qualify you to receive professional development units. Please complete the necessary information on the sign-in sheet if you are applying for professional development units.*

*Agenda items are handled in the order listed on the approved agenda. Items may be rearranged unless listed "time certain". Public comment is welcome on all items listed as "Action" and as noted at the beginning and end of each meeting.*

*The Board of Public Education will make reasonable accommodations for known disabilities that may interfere with an individual's ability to participate in the meeting. Individuals who require such accommodations should make requests to the Board of Public Education as soon as possible prior to the meeting start date. You may write to Kris Stockton, PO Box 200601, Helena MT, 59620, [kmstockton@mt.gov](mailto:kmstockton@mt.gov), 406-444-0302.*

\*\*\*\*\*

### ❖ BOARD OF PUBLIC EDUCATION STRATEGIC PLANNING – Dr. Tim Tharp

|         |                                                            |
|---------|------------------------------------------------------------|
| 12:15PM | DISCUSSION ON GOALS AND INITIAL STRATEGIC PRIORITIES CONT. |
| 1:15PM  | DISCUSS MONITORING AND ACCOUNTABILITY                      |
| 2:00PM  | WRAP UP AND NEXT STEPS                                     |

# BOARD OF PUBLIC EDUCATION MEETING MINUTES

June 22, 2026  
Zoom

**Monday, June 22, 2026**  
**1:30 PM**

## **CALL TO ORDER – 00:00:25**

Chair Tim Tharp called the meeting to order at 1:30 PM. The Chair led the Board in the Pledge of Allegiance, Ms. Kris Stockton took Roll Call, the Chair read the Statement of Public Participation and welcomed guests.

Board members: Dr. Tim Tharp, Chair; Dr. Ron Slinger, Vice Chair; Dr. Hannah Nieskens; Ms. Lisa Schmidt; Ms. Julia Maxwell; Ms. Renee Rasmussen; Ms. Amanda Mills; Ms. Lydia Comstock, Student Representative. Ex Officio members: State Superintendent Susie Hedalen, Office of Public Instruction (OPI). Staff: Ms. McCall Flynn, Executive Director; Ms. Kris Stockton, Administrative Specialist; Mr. Rich Batterman, Board Legal Counsel. Guests: Mr. Ben Ternes, Office of Budget and Program Planning (OBPP); Ms. Christy Mock-Stutz, OPI; Mr. Dylan Klapmeier, OPI; Dr. Erin Ellis, Hellgate Elementary; Ms. Nancy Hall, OBPP; Ms. Marie Judisch, OPI; Ms. Tyler Capece, OPI; Dr. Ryan Schrenk, Montana Digital Academy; Ms. Kim Popham, Montana Federation of Public Employees; Superintendent Matthew Driessen, DeSmet Elementary School District.

## **ADOPT AGENDA – 00:02:44**

**Vice Chair Slinger moved to approve the Consent Agenda. Motion seconded by Board member Schmidt.**

**No discussion. Motion passed unanimously.**

## **❖ ASSESSMENT COMMITTEE – Renee Rasmussen (Item 1)**

### **Item 1                      ACTION ON THE SUPERINTENDENT'S RECOMMENDATIONS ON MODIFICATIONS TO THE SINGLE SYSTEM OF STATEWIDE ASSESSMENT – MATH AND ENGLISH LANGUAGE ARTS – 00:03:25 Renee Rasmussen**

Board member Rasmussen summarized the May meeting discussion regarding the MAST Assessment and shared that the Assessment Committee used Chat GPT to analyze the OPI survey results for trends. The analysis revealed that stakeholder perceptions are improving, while student responses remain stable from year to year showing students prefer the small testlets. Board member Rasmussen noted that areas of concern were lack of trust in data usage, issues with score reporting and availability, high test burden on teachers, insufficient professional development, negative cultural perceptions, and lack of local relevance. Board member Rasmussen noted that Chat GPT recommended improvements in score reporting, building educator trust, enhancing professional development, and focusing on instructional use. Dr. Hannah Nieskens provided additional context on the AI analysis and emphasized it is important to remember that there are strengths among the challenges.

**Board member Rasmussen moved to conditionally approve the Superintendent's recommended modifications to the system of statewide assessment for math and ELA. Approval is conditioned upon the Office of Public Instruction, in consultation with this Board, creating a task force comprised of testing experts, educators, and appropriate stakeholders to refine the assessment to better achieve the following purposes: (1) make instructional usefulness a primary measure of success, improving classroom instruction and student outcomes; (2) boost the efficacy of score reports and the reporting process; (3) limit testing burdens and enhance structured feedback routines; (4) expand opportunities for professional development focused on instructional use; and (5) build educator trust in the data. Motion seconded by Dr. Hannah Nieskens.**

*Superintendent Susie Hedalen noted that the OPI can meet the conditions stated in the motion and requested a meeting with the Board Assessment Committee before the July Board meeting to develop an action plan.*

*Board member Schmidt discussed the importance of growth measurements to improve instruction and would like to see that added.*

*Superintendent Hedalen stated that growth measurements is an area that the OPI is working on and it will be rolled out in the 2026-2027 school year.*

*Board member Rasmussen stated that while MAST has the potential to be an excellent assessment it is not right now and expressed concerns that it is being used to fulfill the federal requirements.*

*Dr. Hannah Nieskens clarified the difference between the OPI Technical Advisory Committee and the proposed Think Tank which would operate similarly to the Accreditation Think Tank.*

*Chair Tim Tharp echoed Dr. Nieskens' statement.*

*Vice Chair Slinger noted that while the data showed conflicting results there is clear room for improvement. Dr. Slinger noted the importance of adhering to the stipulations outlined in the motion.*

*Superintendent Hedalen noted that the OPI has compiled all the feedback and analyzed the results.*

*Board member Rasmussen noted the feedback indicates that OPI is working to improve the test and to assist parents and students with the results.*

*Dr. Nieskens asked whether OPI has the resources to implement the conditions if the motion passes today and what would happen if the motion fails.*

*Superintendent Hedalen stated that while grant funding is available now for enhancements, third through eighth grade assessments are federally funded if the requirements are met, otherwise funding will be pulled.*

*Dr. Erin Ellis gave public comment in support of the MAST Assessment.*

*Superintendent Matthew Driessen concurred with Dr. Ellis and noted that changing the assessment would cause a loss of credibility. He noted that more data assists educators to improve student outcomes and student growth.*

*Dr. Tharp restated the motion.*

*No further discussion. Motion passed unanimously.*

**PUBLIC COMMENT – 00:48:37**

No public comment.

Ms. McCall Flynn reviewed the upcoming July 22-24, 2026, Board meeting.

Chair Tim Tharp thanked everyone for their time and attention to this matter.

**ADJOURN – 00:50:33**

Meeting adjourned at 2:20PM.

*The Montana Board of Public Education is a Professional Development Unit Provider. Attending a Board of Public Education Meeting either in person or via Zoom may qualify you to receive professional development units. Please complete the necessary information on the sign-in sheet if you are applying for professional development units.*

*Agenda items are handled in the order listed on the approved agenda. Items may be rearranged unless listed "time certain". Public comment is welcome on all items listed as "Action" and as noted at the beginning and end of each meeting.*

*The Board of Public Education will make reasonable accommodations for known disabilities that may interfere with an individual's ability to participate in the meeting. Individuals who require such accommodations should make requests to the Board of Public Education as soon as possible prior to the meeting start date. You may write to Kris Stockton, PO Box 200601, Helena MT, 59620, email at: [kmstockton@mt.gov](mailto:kmstockton@mt.gov) or phone at 406-444-0302.*

DRAFT

## **Public Comment June Board Meeting**

### **1. Rob Watson**

I understand that the Board will be considering the future of the Montana Alternative Student Testing (MAST) assessment at its special meeting on June 22. At the Board's previous meeting, members requested additional information regarding MAST implementation, including stakeholder feedback and survey data.

Over the past several weeks, schools have received multiple requests to participate in surveys related to MAST implementation. Specifically, both New Meridian, the assessment vendor, and Education Northwest have distributed surveys seeking educator feedback. New Meridian also offered a \$50 incentive for survey participation. Links to both survey requests are provided below.

- [Education Northwest Survey Request \[drive.google.com\]](#)
- [New Meridian Survey Request \[drive.google.com\]](#)

A third and particularly important source of stakeholder feedback comes from the University of Montana, which has been contracted by the Office of Public Instruction (OPI) to conduct an independent evaluation of the MAST program. Under the direction of Dr. Erica Allen, the University has completed annual research studies on MAST implementation for the past two years and is in the middle of gathering data for the third year in a row.

The University of Montana evaluation includes both a statewide survey and virtual focus groups involving teachers, administrators, and parents/guardians. During the 2024–25 evaluation cycle, 336 stakeholders participated in the survey. This year, nearly 1,000 individuals have already completed the survey. Because the survey questions and focus areas have remained largely consistent from year to year, the study provides valuable longitudinal data regarding stakeholder perceptions and implementation trends.

Dr. Allen's final report is scheduled to be delivered to OPI at the end of September. While that timeline does not align with the Board's June 22 meeting, I strongly encourage the Board to review the report when it becomes available. In my view, the University of Montana's independent evaluation offers the most comprehensive and reliable source of longitudinal information regarding the implementation and effectiveness of MAST.

For reference, the most recent report is available here: [University of Montana MAST Program Evaluation \(2024–25\) \[drive.google.com\]](#)

As the Board considers its decision on June 22, the School Administrators of Montana respectfully offers the following recommendations.

We recognize that Montana must maintain a statewide assessment system and are not advocating for the elimination of MAST. However, based on consistent feedback from school leaders across the state, we believe significant structural improvements are necessary to make the assessment more manageable and effective.

Accordingly, we recommend the following changes:

1. Reduce the Number of Testlets

Determine the minimum number of testlets required to produce a valid and reliable summative score and limit administration to that number.

## 2. Reduce the Number of Testing Windows

With fewer required testlets, schools should be able to administer the assessment within no more than two testing windows per year.

## 3. Increase Local Flexibility

Allow districts greater flexibility in determining when students are ready to take testlets, including the ability to extend testing timelines when educationally appropriate.

## 4. Pause Development of the Science Assessment

Delay further implementation of the MAST science assessment until the concerns and implementation challenges associated with the mathematics and ELA assessments have been adequately addressed.

The School Administrators of Montana respectfully requests that the Board of Public Education use its authority to encourage meaningful changes to the structure, administration, and flexibility of the MAST assessment system.

Thank you for your thoughtful consideration of this important issue and for your continued commitment to Montana's students, educators, and schools.

## 2. Cori Krick

I am an 8th grade English teacher for the Helena Public Schools. I moved to Montana in 2018 after teaching in both Oregon and Washington collectively for over twenty years. I have a great deal of experience writing, reviewing, and scoring items for four different standardized assessments, including the Washington High School Proficiency Exam (discontinued), the Washington Collection of Evidence, the Smarter Balanced Assessment, and most recently, the new Montana MAST. I am a “data-nerd” who values a strong standardized assessment because of the *usable* information it can provide for me, my students, and their families; however, our most recent iteration, MAST, has some very serious red flags. I want to give you a detailed in-the –classroom perspective of what this assessment means in terms of time commitment, curriculum choice and pacing, data, and logistics.

I have written several of you previously, however after reading the article in the Helena IR regarding the board’s consideration of renewing MAST for the next several years, I’m compelled to write again to express my deep concerns and disappointment in this assessment. I think there are some misconceptions about MAST and I hope you’ll dig deeper to get the answers you need to make a fully informed decision. I beg of you to reconsider renewing MAST.

### **MAST Concerns:**

OPI claims:

*“The **Through-Year Assessment** design benefits students, teachers, parents, and administrators by providing actionable data at the beginning of the school year and by providing a meaningful model of student growth over the academic school year (i.e., with-in year so teachers can act as opposed to between years). Another goal for the design feature is to allow districts to **flexibly align testing with local scope and sequence** offering coherence with the taught curriculum.”*

In truth,

- ELA does NOT get to “flexibly align testing with local scope and sequence” at all. We do not get to choose which standards & items are tested at any point in the year. We get to choose when we administer the test, that’s it. The test is static.
- ELA testing is the same blueprint three times (Reading Info & Lit), a writing test in window session 2, and “anchor test” in window session 4
- The MATH tests are not repeated, so there’s no GROWTH for that data. One and done.
- MAST, neither ELA nor math, does not meet state accreditation requirements or ESSA because it is not a growth model.
- Burden on ELA & Math: overall, this is an incredible, unprecedented burden and stress on ELA and math teachers. It is inequitable and unfair, especially for 6-8th grade middle school staff. Our job has changed dramatically because of this assessment. I am a testing administrator, especially in May. This test has robbed my students of valuable classroom instruction and created a series of “testing days” that none of us asked for.

### **ELA Testlets**

Reading Info & Reading Lit testlets: not a computer adaptive test (CAT), every student gets the same version. OPI and New Meridian (test developer) says there are ‘No plans to make it computer adaptive.’

Writing testlet, session window 2:

- Writing is only assessed once
- It is a short response, not a full essay—in item development I expressed serious concerns about this prompt for 6-8<sup>th</sup> grades and the rubrics to no avail. In rangefinding I know that the same concerns were raised multiple times. We were shut down at every turn, “ok, noted, moving on.”
- Scores do NOT even come close to comporting with classroom assessment scores. There is a disturbing and vast discrepancy between how my students score on classroom based assessments and MAST. This is true for other teachers in my building as well.
- OPI and New Meridian are conducting rangefinding AGAIN because they cannot score these correctly.

### **Blueprint:**

- There are SERIOUS security concerns! Every student gets the same exact test. Students can potentially share answers, open the test and look at questions then finish the next day, etc.
- Each testlet has FAR too many standards, including standards typically not taught until much later in the school year. This blueprint has standards (particularly the language standards) on the first testlet that most teachers will likely not get to teach until much later in the year, or maybe not at all
- Not best practice: teachers and strong, viable curricula typically start with the lower-level standards and work toward more sophisticated, complex standards later in the year. According to OPI and New Meridian, session windows 2&3 testlets are adding text complexity and additional texts, but still requiring all the same standards assessed over and over again.
- Vocabulary: anecdotal evidence and student score reports, of the 18 questions on each testlet (Reading Lit & Reading Info), roughly half were vocabulary-related. By comparison, only 15-20% of the Smarter Balanced Assessment was VOCAB/SYNTAX RELATED (according to the SBA blueprint)
- MAST presupposes all teachers across the state teach nearly ALL standards for READING and LANGUAGE in the first couple months of school. Will we realign our curriculum to the assessment? All students across the state get the same testlets, so does that mean teachers in Helena teach the same standards at the same time teachers in Havre do? While horizontal and vertical alignment are important, this seems unlikely to happen.

- Anchor testlet: could be math, could be ELA--We have no idea if it's the testlet that is cumulative, or establishes proficiency, or even the specific content.

#### **Time requirement:**

- **Make-ups are a continuous nightmare for staff in a building this size! It's not "messiness" that happens with every test. It's incredibly difficult with 20 different testlets rather than just 2 at the end of the year.**
- Best-case scenario, 8-12 days of lost instructional time for ELA if administered inside their regular classroom (best practice for assessments)
- Worse-case scenario, even more because we have to get 95% completion rate for ESEA federal requirements. We had about 20% of our students have to complete make-ups due to absences, etc. **This is a logistical nightmare for a school of over 1000 students. Even if we run it during an advisor, we are dedicating WEEKS to testing environment situations.**
- Our school could potentially move to a testing schedule so that ALL 6-8 grade students take the ELA assessments at the same time, thus "spreading the burden" throughout the building, but we are still trying to figure out if this will benefit students to take the testlets outside their regular ELA classroom. Even if we do change to this administration method, the TIME required for completion will not change, especially make-ups for absent students.
- Accountability: 95% of students have to take every testlet to meet our federal ESEA requirements. This means we are chasing students down to complete EACH testlet (8 for ELA) which creates a problem for classroom teachers: loss of instruction time for make-ups or completing; pulling students from other instructional disciplines creates bad feelings between teachers and students; pulling students from other disciplines creates friction between teachers in different disciplines because "ELA teachers are taking kids out of science or social studies to complete their tests."
- OPI published data that claims each testlet takes 20-30 minutes (perhaps revised recently), however this is NOT our experience in administering this fall, nor that of teachers I've talked to in other districts. Even if some students, or even most students complete in 20 minutes,
- **I cannot move forward in that class period until ALL students have completed the testlet.**
- In addition our school must complete 4 iReady class sessions for both ELA & math. Typically, most schools have other standardized assessments in addition to our ESEA requirements.
- 1/3 of our 8th grade students will be required to take the NAEP
- All 8th graders take the state Science test
- Our 8th graders take RBHI, Montana Needs Assessment, and several other surveys.
- **Smarter Balanced** took at most 2 hours for ELA and 2 for math.

#### **Proficiency:**

- We are unsure what the formula will be to establish proficiency. Are the testlets cumulative scores to establish proficiency? Are they weighted? I've asked OPI and New Meridian multiple times, but I've yet to get a complete answer.
- Writing testlet is only given once, so there is no progression of writing, one and done. How does this one testlet will establish proficiency? There is NO other writing on the ELA version of MAST. Additionally, how can we know how a student is "proficient" in writing in January-February? We have nearly half a year to develop those writing skills. The writing should be moved to the last testing window.
- After reviewing scores, the writing testlet scores do NOT comport with standards-aligned classroom assessments. This is true for my colleagues' score reports as well. All assessments in my room are written and must utilize text-based evidence from sources.



- Again, because the writing proficiency scores do not reflect classroom based assessments, OPI is conducting rangefinding AGAIN. They know this is broken. We told them it was a poor test item three years ago, and yet they persisted.

### **ELA Testlets**

- Reading Info & Reading Lit testlets: not a computer adaptive test (CAT), every student gets the same version. OPI and New Meridian (test developer) says there are ‘No plans to make it computer adaptive.’ Students take the same Reading Info & Reading Lit testlets 3 times each. This is not a best-practice for assessments, and it especially is problematic for students who are proficient at the beginning of the year.
- The way that you see data makes it incredibly difficult to see student progress without downloading hundreds of individual reports for comparison
- Anchor testlet: could be math, could be ELA--We have no idea if it’s the testlet that is cumulative, or establishes proficiency, or even the specific content.
- Writing testlet, session window 2:
  - Writing is only assessed once
  - It is a short response, not a full essay—in item development I expressed serious concerns about this prompt for 6-8<sup>th</sup> grades and the rubrics to no avail.
  - Scores do NOT even come close to comporting with classroom assessment scores. There is a disturbing and vast discrepancy between how my students score on classroom based assessments and MAST. This is true for other teachers in my building as well.
  - OPI and New Meridian are conducting rangefinding AGAIN because they cannot score these correctly.
  - After reviewing scores, the writing testlet scores do NOT comport with standards-aligned classroom assessments. This is true for my colleagues’ score reports as well as several parents I talked with in other grade levels.

### **Smarter Balanced Assessment, retired after spring 2024**

- Loss of instructional time was 2-3 class periods for ELA, MUCH less than current MAST model
- Optional Interim tests provided “through-year” data as well as familiarize students with the testing platform
- Optional Interim tests provided teachers with usable data AND had links to instructional tools & resources that could be used to bolster student learning.
- Optional Interim tests could be laser focused on specific standards as teachers taught them, thus aligning to their curriculum maps
- Smarter Balanced offered multiple accessories for teachers to utilize in the classroom: Tools For Teachers website, SMART writing, reporting tools, teacher-created content aligned to standards and linked to test reports, and thousands of retired test items to review with students.
- SBA and its ancillary services and tools, is superior to MAST. We should return to it for the above and even MORE reasons I haven’t the time to enumerate in this document:
  - <https://smarterbalanced.org/our-system/smarter-system/>  
[\[smarterbalanced.org\]](https://smarterbalanced.org/) <https://smarterbalanced.org/our-system/educators/>  
[\[smarterbalanced.org\]](https://smarterbalanced.org/)

### **Administrative Issues:**

The logistics of administering the assessment are a nightmare.

- students must be rostered to a teacher to test (a BTC MUST do this first rostering—can’t be a teacher)

- students can only be rostered to one teacher (No one else can see the data, have to move kids if they change teachers, if they test in another classroom it's a huge pain etc)
- takes forever for students to get put into KITE (new students can take up to a week to get in the system)
- the way that you see data makes it unusable because it is so onerous and inefficient to generate and disseminate for 1000 students and their families and teachers.
- In a bldg of 1000+ students, it is incredibly hard to accommodate IEP/504 "small group test settings" without the whole building being on a testing schedule (nullifying the flexibility of a "window").
- State Accreditation- MAST does not meet our state accreditation standards– Not a growth-model test like iReady or MAPS, and New Meridian indicated it wouldn't be computer adaptive to enable that growth-model (especially for advanced students).
- Waiver for federal accountability-unsure if this has been granted for this school year if MAST summative reports will meet approval
- After MoY assessment, new rosters uploaded, old reports are INACCESSIBLE

Here is a screenshot of my May calendar, and you can see that we are inundated with testing. This is not unique to May, but it's especially awful in the spring. This calendar doesn't even have the testlets that we are giving inside the English classroom or Special Ed small groups.

| Monday                                         | Tuesday                                                                                                                     | Wednesday                                                                       | Thursday                                                                                 | Friday                                                             | Saturday |
|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------------|----------|
| 27                                             | 28                                                                                                                          | 29                                                                              | 30                                                                                       | May 1                                                              | 2        |
|                                                | 2:15pm<br>7:35am Grade 8 Meeting; Room 222, Matt McGinley; Prody, Kathleen                                                  | MAST ELA Make-Ups in Advisor; Hunt, Erin                                        | MAST Reading Lit in ELA; Hunt, Erin<br>10:45am BMA 504 Review; Room 200; Hilliard, Emily |                                                                    |          |
| 4                                              | 5                                                                                                                           | 6                                                                               | 7                                                                                        | 8                                                                  | 9        |
| 2:10pm Assessment Meeting; Library; Hunt, Erin | 2:15pm MAST Math Testing (Regular Advisor); Microsoft Teams Meeting; Hunt, Erin<br>2:45pm FB 504; Room 200; Hilliard, Emily | 2:15pm MAST Math Testing (Regular Advisor); Microsoft Teams Meeting; Hunt, Erin | 1:45pm MAST Math Testing (Long Advisor); Microsoft Teams Meeting; Hunt, Erin             | 2:15pm Math MAST Make-up in Advisor (Regular schedule); Hunt, Erin |          |
| 11                                             | 12                                                                                                                          | 13                                                                              | 14                                                                                       | 15                                                                 | 16       |
|                                                |                                                                                                                             |                                                                                 | 2:20pm K.B. (8) Eval. meeting; CRA Room 200; McLean, Patricia                            |                                                                    |          |
| 18                                             | 19                                                                                                                          | 20                                                                              | 21                                                                                       | 22                                                                 | 23       |
|                                                | i-Ready Reading--Block Schedule; Hunt, Erin                                                                                 | i-Ready Math--Block Schedule; Hunt, Erin                                        | 2:15pm i-Ready Make-Ups in Advisor; Hunt, Erin                                           | 2:15pm i-Ready Make-Ups in Advisor; Hunt, Erin                     |          |

Again, thank you for your consideration of my concerns. I know that I'm not alone with these feelings, and I hope you will either contact more teachers and administrators so that you can get a better picture of the negatives effects this testing has done to our staff, students, and school culture.

### 3. Rebecca Ahles

Thank you for the opportunity to hear teacher voices about MAST Testing. This is a reflection from a 4th grade teacher.

The amount of time it took to administer the MAST test

- We utilized one math block (1.25 hours) per MAST test, but many times all students were finished in time to pre teach the next iReady lesson or work on something else math related. Likewise, we used one ELA block per test (approx 50 minutes) - The ELA definitely took longer for kids than the math so we used the whole block, plus several kids needed additional time on another day to finish

Instructional time that was impacted or taken away -"describe in plain terms the 'actual loss' in instructional time."

- The majority of instructional time lost came in Math, as I felt obligated to do review sessions prior to the testing dates because the windows didn't always align with the standards. **This was especially true with the 3rd window** where a few of the tests could have been taken sooner, thus eliminating the need to a review session (Also, see example below)

Paint the picture about the difficulty in attempting to do makeups for a handful of kids while still trying to carry on instructional activities for the rest of the class. You need to be very specific about what a teacher experiences.

- Make-up sessions are difficult to do in class because the classroom needs to be silent, I cannot teach new material due to some students missing the lesson while testing, etc. This leads to additional loss of instruction time! In addition, the restriction of the testing window makes it more difficult because we never know when a student will be here or not, and if they unexpectedly miss days towards the end of the window (or even if they are absent for an appointment during the scheduled testing time), it adds to make-up session needs and stress on the teacher and student.

Thank you for taking the time to listen to the perspectives of classroom teachers regarding MAST testing. The statement below reflects the experiences and observations of a Special Education teacher working directly with students throughout the testing process.

*As a special education teacher, the MAST assessment took a significant amount of instructional time away from my students. Many students required extended testing sessions, breaks, or multiple sittings to complete the assessment, which impacted the consistency of their specially designed instruction and intervention time.*

*One of the biggest challenges was managing makeup testing while still trying to provide instruction and support to the rest of my groups. In reality, this meant splitting my attention between monitoring a student testing, supporting behaviors or accommodations, and attempting to continue instruction for other students. It created frequent interruptions and made it difficult to maintain instructional routines and momentum for students who rely heavily on structure and consistency.*

*The actual loss in instructional time was especially noticeable in small-group intervention settings, where missing even a few sessions can impact student progress. The testing window also created scheduling difficulties due to absences, related services, and coordinating makeups throughout the day.*

Thank you for being on the Board of Public Education and providing an opportunity for teachers, students, administration and coaches to give feedback on MAST testing. This feedback comes from third grade teachers.

#### *Instructional Time Lost*

- Students complete **20 MAST testlets** throughout the school year.
- **Total testing time** is estimated at **23+ instructional hours** when accounting for:
  - setup and login
  - practice tests
  - administration
  - make-up testing
- In math alone, the **12 required testlets plus the anchor assessment** equate to nearly **three weeks of lost math instruction**.
- Teachers estimate the overall disruption to instructional pacing and learning to be closer to **50 hours throughout the year**.

### *Impact on Teaching and Learning*

- Testing windows often force teachers to choose between:
  - assessing students on skills not yet taught, or
  - interrupting curriculum pacing to implement short-term “bootcamp” style instruction.
- This disrupts the intended scope and sequence of instruction, especially in math where concepts build progressively.
- Teachers report frequently having to pause authentic learning to focus on preparing students for upcoming testlets.

### *Impact on Students*

- Many students require significantly longer than the projected testing time, often taking an entire learning block to complete one testlet.
- MAST utilizes a **one-size-fits-all assessment model** that limits students’ ability to authentically demonstrate understanding.

### *Make-Up Testing Challenges*

- In order for students to complete a MAST makeup Testlet, they are supposed to be provided with a quiet testing environment. We rarely have staff who are trained for administering the MAST who have a quiet space available outside of the classroom. So we are expected to create makeup availability for those students. This also impacts instructional time as we cannot have a regular educational schedule and teach during that time. As a teacher you also have to provide quiet and meaningful work for the students who have finished their testing that keeps them engaged and silent while others are testing. Some students may take up to an hour to complete their makeup testlet. Many times I have students take multiple testlets in one sitting if they have a makeup test if possible. Other times I am not always able to provide a "quiet" testing environment and students just have to complete their unfinished testlet or make up a testlet in the back of the classroom while we are working on other content which may negatively impact their score. We can't afford to lose more instruction time to additional assessments.
- As a result:
  - classroom instruction is interrupted while testing occurs
  - students may complete make-up testing in less-than-ideal environments
  - teachers must simultaneously manage testing and meaningful independent work for other students

### *Concerns with Assessment Alignment*

- Teachers expressed concern that MAST does not align with classroom instructional practices.
- While classrooms prioritize:
  - differentiated instruction
  - collaboration
  - problem-solving
  - project-based learning

### *Overall Concern*

In less than two months, some third grade students completed **11 standardized assessments** between MAST and district testing alone, not including classroom curriculum assessments.

While teachers recognize the importance of assessment and accountability, there is significant concern that the current structure of MAST testing places a heavy burden on instructional time, classroom routines, student well-being, and meaningful learning experiences.

# **CONSENT AGENDA**

## **FINANCIALS**

**51010 Board of Public Education**  
**ORG Budget Summary by OBPP Prog, Subclass, Fund**

Data Selected for Month/FY: 01 (Jul)/2026 through 12 (Jun)/2026

| OBPP Program             | Subclass                             | Fund                      | Org                                | Acct Lvl 1                      | Acct Lvl 2                 | ORG Budget        | Actuals Amt       | A Accrual Amt | ORG Bud Balance  |
|--------------------------|--------------------------------------|---------------------------|------------------------------------|---------------------------------|----------------------------|-------------------|-------------------|---------------|------------------|
| <b>01 K-12 EDUCATION</b> |                                      |                           |                                    |                                 |                            | <b>620,517.00</b> | <b>540,122.20</b> | <b>0.00</b>   | <b>80,394.80</b> |
|                          | <b>235F5 FY 2025 CARRYFORWARD</b>    |                           |                                    |                                 |                            | 43,589.00         | 43,589.00         | 0.00          | 0.00             |
|                          |                                      | <b>01100 General Fund</b> |                                    |                                 |                            | 43,589.00         | 43,589.00         | 0.00          | 0.00             |
|                          |                                      |                           | <b>1 BOARD OF PUBLIC EDUCATION</b> |                                 |                            | 43,589.00         | 43,589.00         | 0.00          | 0.00             |
|                          |                                      |                           |                                    | <b>62000 Operating Expenses</b> |                            | 43,589.00         | 43,589.00         | 0.00          | 0.00             |
|                          |                                      |                           |                                    |                                 | 62000 Operating Expenses   | 43,589.00         | 0.00              | 0.00          | 43,589.00        |
|                          |                                      |                           |                                    |                                 | 62100 Other Services       | 0.00              | 10,237.60         | 0.00          | (10,237.60)      |
|                          |                                      |                           |                                    |                                 | 62200 Supplies & Materials | 0.00              | 8,474.53          | 0.00          | (8,474.53)       |
|                          |                                      |                           |                                    |                                 | 62300 Communications       | 0.00              | 51.80             | 0.00          | (51.80)          |
|                          |                                      |                           |                                    |                                 | 62400 Travel               | 0.00              | 17,365.66         | 0.00          | (17,365.66)      |
|                          |                                      |                           |                                    |                                 | 62500 Rent                 | 0.00              | 6,979.41          | 0.00          | (6,979.41)       |
|                          |                                      |                           |                                    |                                 | 62800 Other Expenses       | 0.00              | 480.00            | 0.00          | (480.00)         |
|                          | <b>235H1 ADMINISTRATION</b>          |                           |                                    |                                 |                            | 556,579.00        | 479,787.01        | 0.00          | 76,791.99        |
|                          |                                      | <b>01100 General Fund</b> |                                    |                                 |                            | 556,579.00        | 479,787.01        | 0.00          | 76,791.99        |
|                          |                                      |                           | <b>1 BOARD OF PUBLIC EDUCATION</b> |                                 |                            | 556,579.00        | 479,787.01        | 0.00          | 76,791.99        |
|                          |                                      |                           |                                    | <b>61000 Personal Services</b>  |                            | 371,691.00        | 357,604.28        | 0.00          | 14,086.72        |
|                          |                                      |                           |                                    |                                 | 61000 Personal Services    | 371,691.00        | 0.00              | 0.00          | 371,691.00       |
|                          |                                      |                           |                                    |                                 | 61100 Salaries             | 0.00              | 255,140.81        | 0.00          | (255,140.81)     |
|                          |                                      |                           |                                    |                                 | 61300 Other Compensation   | 0.00              | 5,800.00          | 0.00          | (5,800.00)       |
|                          |                                      |                           |                                    |                                 | 61400 Employee Benefits    | 0.00              | 96,663.47         | 0.00          | (96,663.47)      |
|                          |                                      |                           |                                    | <b>62000 Operating Expenses</b> |                            | 184,888.00        | 122,182.73        | 0.00          | 62,705.27        |
|                          |                                      |                           |                                    |                                 | 62000 Operating Expenses   | 184,888.00        | 0.00              | 0.00          | 184,888.00       |
|                          |                                      |                           |                                    |                                 | 62100 Other Services       | 0.00              | 25,507.44         | 0.00          | (25,507.44)      |
|                          |                                      |                           |                                    |                                 | 62200 Supplies & Materials | 0.00              | 10,079.70         | 0.00          | (10,079.70)      |
|                          |                                      |                           |                                    |                                 | 62300 Communications       | 0.00              | 4,191.41          | 0.00          | (4,191.41)       |
|                          |                                      |                           |                                    |                                 | 62400 Travel               | 0.00              | 30,687.08         | 0.00          | (30,687.08)      |
|                          |                                      |                           |                                    |                                 | 62500 Rent                 | 0.00              | 14,597.61         | 0.00          | (14,597.61)      |
|                          |                                      |                           |                                    |                                 | 62800 Other Expenses       | 0.00              | 37,119.49         | 0.00          | (37,119.49)      |
|                          | <b>235H4 STATE ITSD/RST</b>          |                           |                                    |                                 |                            | 20,342.00         | 16,746.19         | 0.00          | 3,595.81         |
|                          |                                      | <b>01100 General Fund</b> |                                    |                                 |                            | 20,342.00         | 16,746.19         | 0.00          | 3,595.81         |
|                          |                                      |                           | <b>1 BOARD OF PUBLIC EDUCATION</b> |                                 |                            | 20,342.00         | 16,746.19         | 0.00          | 3,595.81         |
|                          |                                      |                           |                                    | <b>62000 Operating Expenses</b> |                            | 20,342.00         | 16,746.19         | 0.00          | 3,595.81         |
|                          |                                      |                           |                                    |                                 | 62000 Operating Expenses   | 20,342.00         | 0.00              | 0.00          | 20,342.00        |
|                          |                                      |                           |                                    |                                 | 62100 Other Services       | 0.00              | 6,075.46          | 0.00          | (6,075.46)       |
|                          |                                      |                           |                                    |                                 | 62200 Supplies & Materials | 0.00              | 2,939.69          | 0.00          | (2,939.69)       |
|                          |                                      |                           |                                    |                                 | 62300 Communications       | 0.00              | 7,731.04          | 0.00          | (7,731.04)       |
|                          | <b>235Z1 WORKERS COMP. REDUCTION</b> |                           |                                    |                                 |                            | 7.00              | 0.00              | 0.00          | 7.00             |
|                          |                                      | <b>01100 General Fund</b> |                                    |                                 |                            | 7.00              | 0.00              | 0.00          | 7.00             |
|                          |                                      |                           | <b>1 BOARD OF PUBLIC EDUCATION</b> |                                 |                            | 7.00              | 0.00              | 0.00          | 7.00             |
|                          |                                      |                           |                                    | <b>61000 Personal Services</b>  |                            | 7.00              | 0.00              | 0.00          | 7.00             |
|                          |                                      |                           |                                    |                                 | 61000 Personal Services    | 7.00              | 0.00              | 0.00          | 7.00             |
| <b>Grand Total</b>       |                                      |                           |                                    |                                 |                            | <b>620,517.00</b> | <b>540,122.20</b> | <b>0.00</b>   | <b>80,394.80</b> |

❖ **REPORTS – (Items 1-5)**

**Dr. Tim Tharp**

**ITEM 1**

**CHAIRPERSON REPORT**

**Dr. Tim Tharp**

## **ITEM 2**

### **EXECUTIVE DIRECTOR REPORT**

**McCall Flynn**



## **ITEM 3**

### **STATE SUPERINTENDENT REPORT**

- **Assessment Update**
- **Federal Update**
- **OPI Staffing Report**
- **Content Standards Revision Update**
- **Data Modernization Update**

**State Superintendent Susie Hedalen**



## July 2026 BPE Assessment Update

### 2026-2027 Assessment Windows

| Anticipated<br>SY2026-27 Test Windows                          |                                                    | Required Subjects               | Student<br>Group                                                                                                      | Grades Tested   | Window<br>Period            |
|----------------------------------------------------------------|----------------------------------------------------|---------------------------------|-----------------------------------------------------------------------------------------------------------------------|-----------------|-----------------------------|
| Montana Aligned to<br>Standards Through-Year<br>(MAST)         | <u>Window 1</u><br>October 19-December 11          | Math and ELA                    | General                                                                                                               | Grades 3–8      | 3 windows:<br>8 weeks each  |
|                                                                | <u>Window 2</u><br>January 11-March 5              |                                 |                                                                                                                       |                 |                             |
|                                                                | <u>Window 3</u><br>March 29-May 21                 |                                 |                                                                                                                       |                 |                             |
| Dynamic Learning Maps<br>(DLM) Alternate ELA and<br>Math       | <u>Fall Window</u><br>September 14- December<br>18 | Math and ELA                    | SwSCDs                                                                                                                | Grades 3-8, 11  | 2 windows:<br>15 weeks each |
|                                                                | <u>Spring Window</u><br>February 1- May 21         |                                 |                                                                                                                       |                 |                             |
| WIDA ACCESS<br>Alt ACCESS                                      | January 4-March 5                                  | English Language<br>Proficiency | English<br>Learners                                                                                                   | Grades K–12     | 9 weeks                     |
| Montana Science<br>Assessment (MSA)                            | March 1-May 21                                     | Science                         | General                                                                                                               | Grades 5, 8     | 8 weeks                     |
| Dynamic Learning Maps<br>(DLM) Alternate Science               | February 1-<br>May 21                              | Science                         | SwSCDs                                                                                                                | Grades 5, 8, 11 | 15 weeks                    |
| ACT with Writing                                               | <u>Window 1</u><br>March 23-April 2                | Math, ELA, and<br>Science       | General                                                                                                               | Grade 11        | 3 windows:<br>2 weeks each  |
|                                                                | <u>Window 2</u><br>April 6-16                      |                                 |                                                                                                                       |                 |                             |
|                                                                | <u>Window 3</u><br>April 20-30                     |                                 |                                                                                                                       |                 |                             |
| Updated by the Office of Public Instruction on<br>May 5, 2026. |                                                    |                                 | <b>Note:</b> Dates and information listed in this<br>schedule are subject to change at any<br>time or without notice. |                 |                             |

### 2026-2027 Assessment Field Support

The Assessment Unit provides both synchronous and asynchronous training and support throughout the school year. These include:

- MAST Scheduler Training-*August 3, 2026*
- MAST Virtual Summit-*September 10, 2026*
- Annual STC Workshop Series in September
- Weekly live webinars leading up to statewide MAST testing-*October*
- MFPE MAST Administration and Score Report Sessions-*October 15 & 16, 2026*
- Recorded tutorials are available in both the OPI Learning Hub, on the OPI Assessment Unit YouTube Channel, and MontCAS webpage
- Monthly Assessment Bulletin with timely tasks and support
- MAST Memo: Teacher-centered emails to support alignment of assessment, instruction, and data use.

## MAST Professional Learning

### MAST: PEAKS OF PRACTICE

*Elevating instructional practices to support student outcomes in Montana*

- A focused virtual professional learning event where educators explore effective instruction, meaningful assessment, and standards-aligned teaching
- Participants gain practical strategies, share expertise, and strengthen practices that improve student learning
- Targeted to support instructional leaders and teachers



**AUGUST 20, 2026**

- 8:30 - 11:30, 12:30 - 3:30PM
- **REGISTER [HERE!](#)**



## MAST Teacher Leader Cohort

June 16 & 17, ~40 Educators came together at Montana State University as a part of the OPI Summer Institute focused on Foundations for Personalized and Proficiency-Based Learning, utilizing MAST as the throughline assessment as part of the classroom evidence to support classroom instruction. As a cohort, this learning is not simply completed in a singular session, it is a year-long sequence of intentional learning events to support building educators' capacity.



### Cohort Purpose Statement

The MAST Teacher Leader Cohort brings together a diverse network of educators and stakeholders committed to student success **so we can** foster collaboration, deepen our understanding of learning, and use data in ways that empower both teachers and students **to ensure equitable, high-quality learning experiences and meaningful outcomes for every student.**

## MAST Virtual Cohort

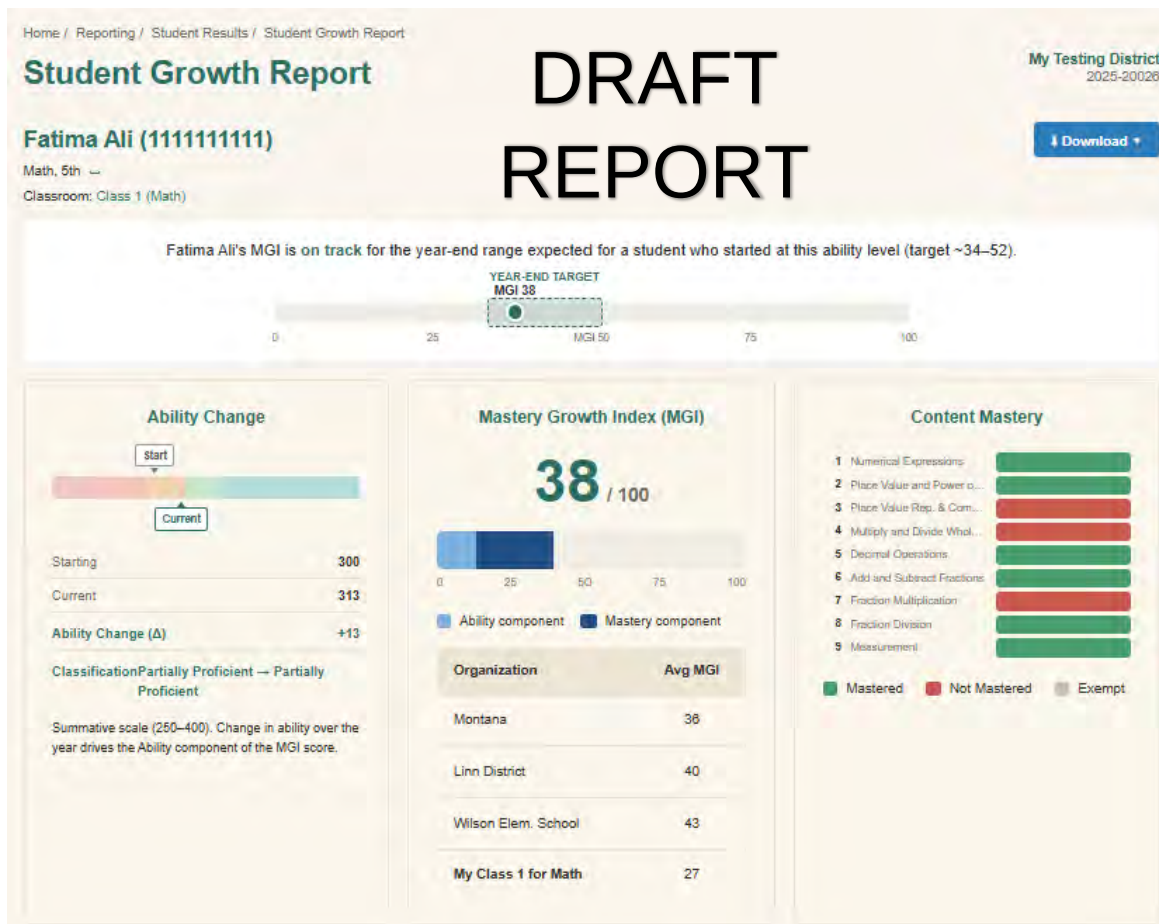
- Finalizing Details - will Launch October 2026
- Monthly Professional Learning aligned to resources built with Teacher Leader Cohort

## MAST Growth Metric



**MGI (Mastery Growth Index) is a composite of two components:**

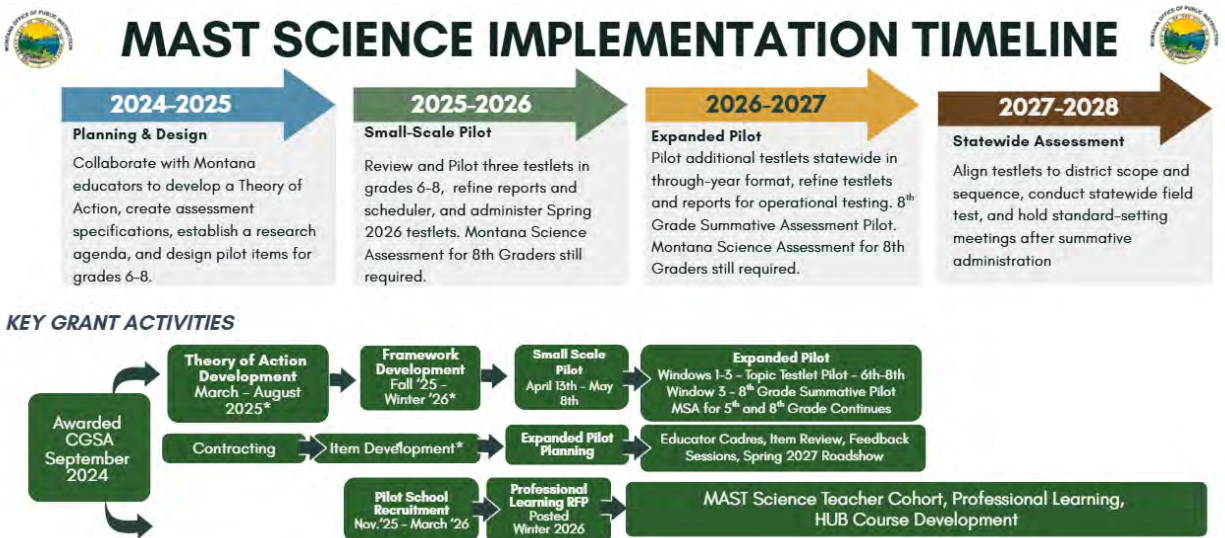
- *Component 1:* The growth in latent proficiency relative to the change in proficiency needed to reach mastery (Ability Change)
- *Component 2:* The aggregation of knowledge and skills gained throughout the year (Content Mastery)





## MAST Science 2026–27 Pilot Plan

- Conducted a Lunch and Learn PD session at the MT OPI Summer Institute, bringing educators together to better understand the pilot and give feedback for future work and overall design.
- During the 2026–27 school year, grades 6–8 will participate in a full-year pilot of the new science Topic Testlets. Schools will administer these testlets across all three MAST assessment windows, with new sets released progressively following Montana educator item review. This approach ensures that students and educators engage with the full range of 6–8 banded Montana Science Standards throughout the year while supporting ongoing feedback and refinement of the assessment system.
- The MAST Science 2026–27 Pilot will follow administration windows that align with the existing MAST Math and ELA schedules.
- All topic testlets and summative tests will be delivered through the KITE platform, providing a consistent experience across content areas.
- Topic Testlets are designed to provide educators with standards-aligned insights throughout the school year, supporting informed instructional decision-making. All Topic Testlets are available for grades 6–8 and offer flexibility in how schools choose to deliver the banded 6–8 Montana Science Standards.
- 8th Grade Summative Pilot: Administered during Window 3.
- Progressive Release of Topic Testlets (Grades 6–8): New science topic testlets will be released after Montana educator item reviews.
  - Window 1: 6 topic testlets
  - Window 2: 9 topic testlets
  - Window 3: 12 topic testlets
  - Fall 2027–28: Full set of all 15 topic testlets available
- During the 2026–27 school year, 5th and 8th grade students will continue to take the current Montana Science Assessment in the spring.



If you have any questions, please contact:  
**Ryan Schrenk, Assessment Director**  
[ryan.schrenk@mt.gov](mailto:ryan.schrenk@mt.gov)



## Federal Update- As of July 1, 2026

### New Interagency Agreements

In June the U.S. Department of Education announced four new interagency agreements (IAAs) designed to reduce federal bureaucracy and improve the efficient delivery of federally funded programs and activities to better support students and families.

#### [Department of Education \(ED\) and Department of Justice \(DOJ\) Civil Rights Partnership](#)

ED and DOJ are strengthening their collaboration to ensure equal educational access and excellence. By leveraging all statutory authorities, they aim to create a more efficient civil rights enforcement protocol. This partnership will ensure institutions receiving Federal funding comply fully with civil rights laws through a shared commitment to:

- reinforce and strengthen respective enforcement processes and procedures to ensure vigorous enforcement of laws;
- increase cross agency administrative alignment of civil rights enforcement policies and programmatic requirements;
- provide process improvements by leveraging the expertise and capacity of both agencies to provide aggressive and focused civil rights expert oversight of America's education institutions.

#### [Department of Education \(ED\) and Department of Health and Human Services \(HHS\) Special Education and Rehabilitative Services Partnership](#)

In a shared effort to improve results in early childhood, education, and career sectors, ED and HHS are strengthening their collaboration to better align resources and expand opportunities for people with disabilities. This pledge encompasses the following goals:

- ensuring that all children with disabilities have available to them a free appropriate public education that emphasizes special education and related services designed to meet their individual needs and prepare them for further education, employment and independent living;
- ensuring the rights of infants, toddlers, children, youth and adults with disabilities and their families are fully protected;
- advancing employment outcomes for individuals with disabilities to maximize their independence and integration into the community and competitive labor market.



### Montana Ed-Flex Waivers

The U.S. Department of Education [approved](#) Montana's request for federal Ed-Flex waivers for local school districts. Under the Educational Flexibility Partnership Act (Ed-Flex) U.S. Secretary of Education Linda McMahon has authorized Superintendent Hedalen to waive certain federal statutory and regulatory requirements for Montana's local schools.

Montana has specifically been granted the authority to waive certain bureaucratic hurdles in the following federal formula funds:

- Title I, Part A- Basic Programs Operated by Local Education Agencies
- Title I, Part C- Education of Migratory Children
- Title II, Part A- Supporting Effective Instruction
- Title IV, Part A- Student Support and Academic Enrichment

Full details of the waiver can be found in the state's approved [application](#) and [FAQ document](#).

### **Approved District [Applications](#) for SY 2026-2027:**

| <b>District</b> | <b>District Wide or School(s)</b>                     | <b>Approved Waiver (s)</b>                                           |
|-----------------|-------------------------------------------------------|----------------------------------------------------------------------|
| Bear Paw        | Bear Paw ES                                           | Title I, Part A – Waived Schoolwide Program Eligibility Requirements |
| Butte           | Margaret Leary ES, Whittier ES, East MS, and Butte HS | Title I, Part A – Waived Schoolwide Program Eligibility Requirements |
| Butte           | District                                              | Title I, Part-Waived Carry Over Requirement                          |
| Butte           | District                                              | Title IV, Part A -Waive the percent funding of the SSAEgoals         |
| Cleveland       | Cleveland ES                                          | Title I, Part A – Waived Schoolwide Program Eligibility Requirements |
| Creston         | Creston School                                        | Title I, Part A – Waived Schoolwide Program Eligibility Requirements |



|           |                  |                                                                            |
|-----------|------------------|----------------------------------------------------------------------------|
| Deer Park | Deer Park School | Title I, Part A – Waived<br>Schoolwide Program Eligibility<br>Requirements |
| Lavina    | Lavina K-12      | Title I, Part A – Waived<br>Schoolwide Program Eligibility<br>Requirements |
| Lone Rock | Lone Rock School | Title I, Part A – Waived<br>Schoolwide Program Eligibility<br>Requirements |

#### FY 2026 Allocations

In July the Office of Public Instruction received notification of the allocations for Title programs including:

- Title I, Part A – Improving Basic Programs Operated by Local Educational Agencies\*
- Title I, Part B – State Assessments
- Title I, Part C – Education of Migratory Children
- Title I, Part D, Subpart 1 – Prevention and Intervention Programs for Children and Youth Who Are Neglected, Delinquent, or At-Risk
- Title II, Part A – Supporting Effective Instruction\*
- Title III, Part A – English Language Acquisition
- Title IV, Part A – Student Support and Academic Enrichment
- Title IV, Part B – Nita M. Lowey 21st Century Community Learning Centers
- Title V, Part B, Subpart 2 – Rural and Low-Income School
- *McKinney-Vento Homeless Assistance Act* – Education for Homeless Children

The two programs identified with an asterisk are partially advance funded this year. This means that a portion of the appropriation was available on July 1st and the remaining balance will be available October 1, 2026.



Susie Hedalen, Superintendent  
PO Box 202501  
Helena, MT 59620-2501



Phone: 406.444.3680  
opi.mt.gov

## OPI Staffing Update- As of July 1, 2026

Total Vacancies: 19

In Recruitment: 7

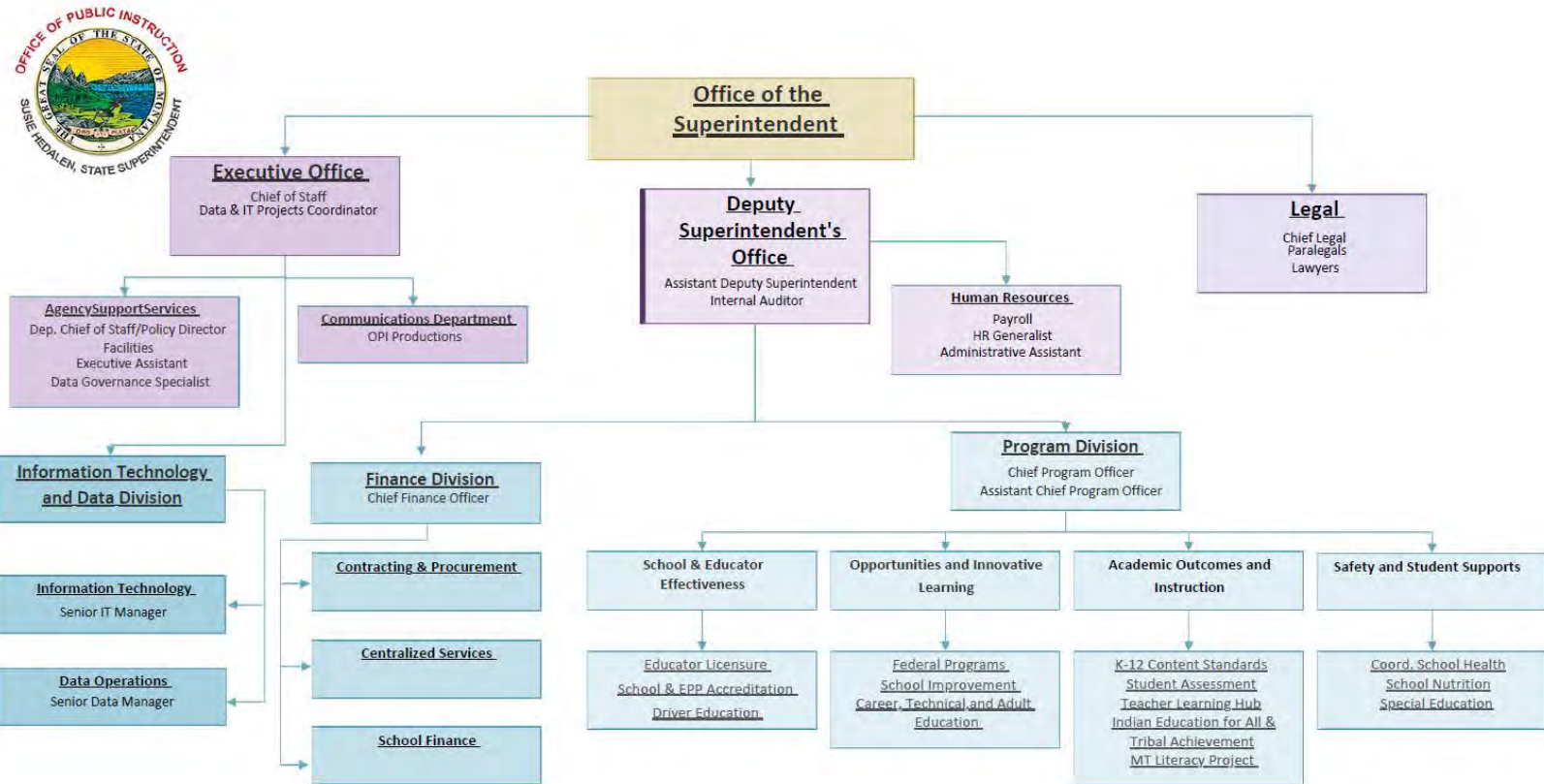
Preparing for Recruitment: 3

In Hiring Process: 3

In Holding Process: 6

Vacancies by Funding Type:

- ❖ General Fund: 13
- ❖ Federal: 4
- ❖ Proprietary: 2





## July 2026 BPE Content Standards Update

### General Update:

- **New Science Instructional Coordinator**
  - Cody Olson will be joining the OPI on July 13th
  - Former high school Science Educator from Whitefish
- **Statewide Standards Rollout Professional Learning**
  - OPI continues statewide implementation of the revised Math and ELA standards through the Regional Standards Road Show. Dates are confirmed in Whitehall, coordination is underway with Malta, and a third regional location is being finalized.
  - Recent professional learning included sessions at the OPI Summer Institute for both Math and ELA. Additional training, particularly focused on data literacy in Math, will be offered at the STEM Summer Institute in August.
  - OPI launched the first Math Practices course on the Teacher Learning Hub, enrolling 17 educators within days of release.
    - [Mathematical Practice #1: Problem-Solve and Persevere](#)
- **Satchel Professional Learning Series**
  - OPI will launch a year-long Satchel professional learning series that will include monthly virtual workshops, structured hands-on exploration time, optional office hours, and ongoing community-of-practice engagement. Each session will focus on a specific implementation theme, such as ISAP and Graduate Profile alignment, evidence-based instructional practices, collaboration, assessment, wellness, and student-centered applications. The series will support educators in building proficiency with Satchel tools while strengthening instructional planning, data-informed decision making, and district strategic alignment.
- **Family & Community Math Toolkit**
  - A new math toolkit for families and communities has been developed and will be posted once the agency's website migration is complete.

---

### Montana Mathematics Content Standards Implementation Resources for Educators (available on the OPI's website)

- [Montana PK-12 Mathematics Content Standards](#)
- [Montana Kindergarten Mathematics Standards](#) (April 2026 version)
- [Montana Grade 1 Mathematics Standards](#) (April 2026 version)
- [Satchel](#)

- [Recommended Pathways for HS Math - Public](#)
- [Appendix G\\_High School Mathematics Course Recommendations\\_2025.07.02.pdf](#)

### Resources in Development:

- 2nd - HS Expanded Guidance Documents
- High School IEFA-aligned math items developed with Education Northwest
- A new high school concepts clarification tool outlining required, new, and elective concepts
- Continued posting of expanded guidance documents on Satchel

## Math Standards Implementation Professional Learning Series

- **2025-2026 Recorded Professional Learning Events**
  - August: [Why the Change? Understanding the New Math Standards](#)
  - September: [Exploring the Changes and Structure: Navigating the Standards Document](#)
  - October: [Mathematical Practices: What They Are & Why They Matter](#)
  - November: [From Fluency to Flexibility: Understanding Mathematical Proficiency](#)
  - December: [Aligning Your Curriculum: Where Do We Stand?](#)
  - January: [Assessment & Standards: What Needs to Change?](#)
  - February: [Differentiation & Access: Supporting All Learners](#)
  - March: [IEFA & Cultural Relevance: Making Math Meaningful for Montana Students](#)
  - April: [Next Steps: Identifying District/School Needs for Implementation](#)
- **2026-2027 Planned Professional Learning Events**
  - K–8 Webinars: 2nd Wednesday, 4:00 to 5:00 PM
  - 9–12 Webinars: 3rd Wednesday, 4:00 to 5:00 PM

## Montana ELA & Literacy Content Standards Revisions

### Resources for Educators

- \*New\* [2027 ELA Standards on Satchel](#)
- [Montana ELA K-12 English Language Arts and Literacy Content Standards](#)
- [MT ELA Standards and Coding](#)
- [PK-12 Standards Basic Guidance](#)
- [Summary of ELA & Literacy Content Standards Revisions](#)
- [Montana Content Standards Revision – Alignment with the Science of Reading](#)

## ELA Standards Implementation Professional Learning Series

- [Calendar and Topics](#)
- [Registration](#)
  - August 26, 2026: Why the Change? Understanding the ELA Standards
  - September 23, 2026: Literacy Practices: What They Are and Why They Matter
  - October 21, 2026: Expanding on the Foundational Standards: Elementary
  - November 18, 2026: Expanding on the Foundational Standards: Secondary
  - December 16, 2026: Aligning Your Curriculum: Where Do You Stand?

- January 20, 2027: Assessment and Standards: What Needs to Change?
- February 17, 2027: Differentiation and Access: Supporting All Learners
- March 17, 2027: IEFA and Cultural Relevance: Making Meaning for Montana Students
- April 21, 2027: Next Steps: Identifying District and School Needs for Implementation

## Montana Math Skills Map - Sample

- We are excited to launch our new Math Skills Map on Satchel, a comprehensive guide designed to support educators in identifying, teaching, and strengthening the essential skills that build toward algebra proficiency. This tool brings together standards, instructional strategies, visual models, and common student pathways to help teachers clearly see how foundational concepts connect across grade levels. With organized skill progressions and ready-to-use classroom resources, the Math Skills Map empowers educators to make intentional instructional decisions that close gaps, deepen understanding, and accelerate student success in mathematics.

**Figure 1: Guide**

**0.D1.1 How to Read a Skill Code** A guide to understanding the numbering system used in this framework. 📄

**Notes**  
**How to Read a Skill Code**  
 Every skill has a code like 0.D1.1. Here is what each part means:

- 0 — the grade or course. Grades are numbered 1–8 for Grades 1–8, or A1 for Algebra 1.
- D1 — the skill depth within that grade.  
 Depth 1 is the most advanced skills (the grade-level targets).  
 Higher numbers are foundational prerequisites —  
 Depth 2 must be mastered before Depth 1. Depth 3 before Depth 2, and so on.
- .1 — when more than one skill shares the same grade and depth,  
 a number at the end tells them apart.

A real example: **6.D2.1** (Equivalent Ratios) means Grade 6, a prerequisite at depth 2, first skill in that group.

SHOW LESS ▲

---

**Supplemental Information**  
**CODE ANATOMY**

**6 · D2 · 1**  
 Equivalent Ratios

|           |                                                                                           |
|-----------|-------------------------------------------------------------------------------------------|
| <b>6</b>  | <b>Grade / Course</b> — Grade 6. Grades 1–8 use 1–8; Algebra 1 uses A1.                   |
| <b>D2</b> | <b>Skill Depth</b> — depth 2; a prerequisite for a grade-level target. See diagram below. |
| <b>.1</b> | <b>Position</b> — 1st skill sharing this grade and depth.                                 |

---

**LEARNING PROGRESSION**

```

graph TD
    D1[6.D1.1  
Grade-level Target]
    D2_1[6.D2.1  
Equivalent Ratios]
    D2_2[6.D2.2  
Prerequisite]
    D3_1[6.D3.1  
Foundational]
    D3_2[6.D3.2  
Foundational]

    D1 --> D2_1
    D1 --> D2_2
    D2_1 <--> D2_2
    D2_1 --> D3_1
    D2_2 --> D3_2
  
```

— **Depth 1**  
Grade-level target.

— **Depth 2**  
Prerequisite for D1.

— **Depth 3**  
Prerequisite for D2.

**Figure 2: Sample Skill Resources**

**1.D1 Operation Properties** I will define, identify, and use the commutative and associative properties of addition and multiplication.

**Supplemental Information**

- ▶ Overview
- ▶ Launch
- ▶ Teacher/Student Strategies
- ▶ Models and Manipulatives
- ▶ Questions to Check Understanding
- ▶ Discussion Questions
- ▶ Common Misconceptions
- ▶ Additional Resources

SHOW LESS

EXPAND

↔ MT.3.OA.5 ↔ MT.K.OA.6 ▼ 7.D3.3 ▼ 5.D2.5 ▼ 6.D1.13

**Figure 3: Associated Skills and Standards**

| ↔ Montana Mathematics Content Standards (2026) - Skills and Pathways                                                                                                                                                | ▲ CONTRACT |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| ↔ Related MT.3.OA.5 Apply the commutative property of multiplication, associative property of multiplication, and distributive property of multiplication over addition on whole numbers as strategies to multiply. |            |
| ↔ Related MT.K.OA.6 Recognize the characteristics of the commutative property in addition.                                                                                                                          |            |
| ▼ Precedes 7.D3.3 Add & Subtract Linear Expressions I will add and subtract linear algebraic expressions.                                                                                                           |            |
| ▼ Precedes 5.D2.5 Order of Operations - without Exponents I will use the order of operations, including parentheses, to evaluate numerical expressions involving whole numbers.                                     |            |
| ▼ Precedes 6.D1.13 Equivalent Expressions I will apply the properties of operations to generate equivalent expressions and check the equivalency using substitution.                                                |            |

**Figure 4: Expanded Resources 1**

**1.D1 Operation Properties** I will define, identify, and use the commutative and associative properties of addition and multiplication.

**Supplemental Information**

▼ Overview

**Essential Question:** How can I use the commutative and associative properties of addition and multiplication to solve problems?

**Skill Scope:** One- and two-digit whole numbers only.

▼ Launch

- Have students solve the following equations:  $7 \times 5 = ?$  and  $5 \times 7 = ?$ . Discuss with students what they notice about the product to both equations. Even though the order of the numbers are different, does the answer change? Why might this happen?

▼ Teacher/Student Strategies

**Suggested Strategy for an Initial Lesson:** Through this skill, students should notice patterns with these properties in order to learn how to use them.

Commutative Property: Changing the order of addends (or factors) does not change the sum (or product). Example:  $7 + 5 = 12$  and  $5 + 7 = 12$

Associative Property: Changing the grouping of addends (or factors) does not change the sum (or product). Example:  $(4 \times 6) \times 2 = 4 \times (6 \times 2)$

SHOW LESS

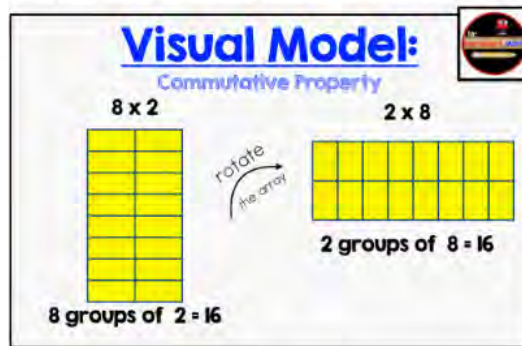
**Figure 5: Expanded Resources 2**



#### Supplemental Information

##### ▼ Models and Manipulatives

**Highlight Model:** Students can use the array model to help demonstrate how they can actually rotate the array to show the commutative property.



SHOW LESS ▲

#### Supplemental Information

##### ▼ Questions to Check Understanding

- Look at the multiplication problem. Solve both parts. Do both answers match?
- Look at the problem given. Can you draw an array to represent the multiplication problem?
- Look at the parenthesis for your multiplication problem, how did it change the groupings of the numbers?
- In the addition problem, can you find easier numbers to add by making 10's?

##### ▼ Discussion Questions

- Why do the commutative and associative properties only work with multiplication and not division?
- Can you apply the commutative or associative property when the equation has more than one operation?
- What would happen if you changed around the order of numbers in a subtraction problem?

##### ▼ Common Misconceptions

- Students might apply these properties to subtraction or division. To help with this, enforce a conceptual understanding of the properties using manipulatives.
- Students may confuse the associative and commutative properties when using multiplication or addition.
- Students might only use one of the properties when an equation will have both addition and multiplication.

##### ▼ Additional Resources

- [Math is Fun](#) has visual models to represent both properties.
- [PBS Learning Media](#) has a video explaining the associative and commutative properties.

SHOW LESS ▲

## Sample 2: High School Core Algebraic And Functional Reasoning Standards

**Figure 6: HS Skill Example**

**8.D6 Slope & y-Intercept** I will determine the slope and y-intercept of a line from a graph, and explain what slope and y-intercept mean in real world and mathematical problems.

Supplemental Information

▼ Pathway to: 8.D6 Slope & y-Intercept

- 8th Grade Prerequisites
- 7th Grade Prerequisites
- 6th Grade Prerequisites
- 5th Grade Prerequisites
- 4th Grade Prerequisites
- 3rd Grade Prerequisites
- 2nd Grade Prerequisites

► Overview

SHOW LESS

**Figure 6: HS Skill Associations**

| ↔ Montana Mathematics Content Standards (2026) - Skills and Pathways | ▲ CONTRACT                                                                                                                                                                                                                                                                                                                                        |
|----------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ↔ Related                                                            | <b>MT.HS.CORE.ALG.LIN.1</b> Understand that linear functions have a constant rate of change.                                                                                                                                                                                                                                                      |
| ↔ Related                                                            | <b>MT.HS.CORE.ALG.MOD.2</b> Interpret the coefficients in a linear, quadratic, and exponential model in context. This standard should incorporate cultural context relating to Montana Indigenous Peoples and local communities.                                                                                                                  |
| ↔ Related                                                            | <b>MT.8.F.4</b> Given linear data relating two quantities, construct a linear function that models the data and interpret the rate of change and initial value of a linear function in terms of the situation it models.                                                                                                                          |
| ↔ Related                                                            | <b>MT.HS.CORE.ALG.LIN.2</b> Understand slope as a rate of change and y-intercept as initial value.                                                                                                                                                                                                                                                |
| ↔ Related                                                            | <b>MT.HS.CORE.ALG.LIN.3.a</b> Represent linear functions using tables, graphs, equations, and verbal situations, while using technology strategically. This standard should incorporate cultural context relating to Montana Indigenous Peoples and local communities by identifying the rate of change and initial value in each representation. |
| ▲ Follows                                                            | <b>6.D1.6 Represent Linear Relationships</b> I will represent linear relationships in tables, equations, and graphs in the first quadrant of the coordinate plane.                                                                                                                                                                                |
| ▲ Follows                                                            | <b>8.D7.1 Compare Proportions</b> I will graph proportional relationships, interpreting the unit rate as the slope of the graph and compare two different proportional relationships represented in different ways.                                                                                                                               |
| ▼ Precedes                                                           | <b>8.D1.3 Lines of Best Fit</b> I will make and use lines of best fit on scatterplots and their equations to analyze data.                                                                                                                                                                                                                        |
| ▼ Precedes                                                           | <b>8.D5.1 Construct Functions</b> I will construct a function to model a linear relationship and describe the rate of change and initial value.                                                                                                                                                                                                   |
| ▼ Precedes                                                           | <b>8.D1.7 Analyze &amp; Compare Linear Relationships</b> I will represent, analyze, and compare linear relationships in graphs, equations, and tables.                                                                                                                                                                                            |
| ▼ Precedes                                                           | <b>8.D3.9 Systems of Equations - Elimination</b> I will solve systems of linear equations by eliminating variables.                                                                                                                                                                                                                               |
| ▼ Precedes                                                           | <b>A1.D2.6 Solve Problems with Best Fit Lines</b> I will fit a function to a bivariate data and use it to solve problems.                                                                                                                                                                                                                         |
| ▼ Precedes                                                           | <b>8.D4.6 Ordered Pairs &amp; Systems</b> I will determine if an ordered pair satisfies a system of linear equations.                                                                                                                                                                                                                             |
| ▲ Follows                                                            | <b>8.D7.2 Linear &amp; Proportional Relationships</b> I will determine if a linear relationship is also a proportional relationship.                                                                                                                                                                                                              |

**Content Standards Team:**

[Katrina Engeldrum](#), Math Instructional Coordinator  
[Claire Mikeson](#), ELA and Literacy Instructional Coordinator  
 Cody Olson, Science Instructional Coordinator  
[Aimee Konzen](#), Professional Learning Manager  
[Marie Judisch](#), Senior Manager of Academic Outcomes & Instruction



## Introduction to Educational Data Modernization and Integration

Beginning in June 2023, OPI and PowerSchool have been partnered to provide updates to the school information dashboards and data available for education stakeholders across the state. This includes our districts, school administrators, teachers, parents, legislators and other state agencies. Our goal is to modernize data reporting and visualization to ensure that we can mechanize data for informed decision-making and forward momentum. The OPI is committed to working with our partners and stakeholders to continue to provide Montana's students with the best education we can. We are also committed to maintaining compliance with the 2023 Legislative Session's [HB 367](#) and [HB 949](#).

Our vendor partner, PowerSchool, continues to work with OPI to implement solutions on two key platforms: Connected Intelligence and Analytics and Insights. PowerSchool has a strategic partnership with Snowflake to provide the infrastructure for their Connected Intelligence data lake product. Data can then be leveraged from this system into the Analytics and Insights visualization platform to enable efficient data utilization, sharing, and analysis to modernize Montana's educational data.

OPI and PowerSchool have moved forward with some clear project management goals: regular project team meetings, status updates, and more focused ad-hoc meetings to work through issues like single sign-on (SSO), data discrepancies, dashboard fitting, and to ensure alignment on business rules.

### Data Modernization Project Evolution

Understanding the need and desire for a robust data platform for all our schools, the OPI is working on the development of our data modernization solution in three key phases:

- Phase I: this phase establishes the underlying infrastructure of Connected Intelligence and uses state-reported educational data to solution the Analytics and Insights OPI Edition. This platform will be available for all schools in the state. Data will also be used to build a public-facing education data dashboard: Community Engagement.
- Phase II: this phase invites districts to connect more of their education data to add additional functionality in a separate Analytics and Insights: Direct Connection version of the visualization platform. This version allows us to leverage our partnership with PowerSchool to create connectors between a district or system Student Information System (SIS) and Connected Intelligence to capture information above what is required for state and federal reporting. This data will allow schools that opt-in to see additional dashboards and utilize additional modules, including the Multi-Tiered System of Supports (MTSS) module.
- Phase III: this phase is aimed at improving the infrastructure of data that OPI has by ensuring that it migrates to a CEDS-compliance format, the future of data infrastructure. It will also move the Montana State Education Report Cards into the Community Engagement platform for ease of access and readability.

### Data Modernization Project Team

The Office of Public Instruction is committed to ensuring that data modernization is at the forefront of our efforts. To this end, we encourage that anyone with questions reach out to one of the following individuals:

- Kellee Tjaden, IT Project Manager ([Kellee.Tjaden@mt.gov](mailto:Kellee.Tjaden@mt.gov))
- Anna Hoerner, Business Analyst ([Anna.Hoerner@mt.gov](mailto:Anna.Hoerner@mt.gov))
- Lucas Rowsey, IT and Data Special Projects Coordinator ([Lucas.Rowsey@mt.gov](mailto:Lucas.Rowsey@mt.gov))





## **Current Activities: June 19, 2026**

### **Phase I: Connected Intelligence and Analytics & Insights OPI Edition**

- OPI has been working with the PowerSchool team to finalize the assessment data load format
- Assessments were loaded on February 27, but exceptions were noted so QA will need to be completed
- OPI is continuing internal conversations and discovery on additional data sources for replication into Connected Intelligence
- Initial authorization setup tested and confirmed for the SSO solution for the OPI Edition. Testing is ongoing for the different roles
- The school-district-system crosswalk was identified as a problem earlier this year; this has recently been fixed and OPI will be able to resume QA work for the dashboards that was previously held up because of this identified issue
- OPI and PowerSchool are addressing any other issue items and tickets that come up
- OPI continues to attend additional information sessions offered by PowerSchool (e.g. Power Panel)

### **Phase II: Analytics & Insights Direct Connect Edition**

- OPI, PowerSchool, and Infinite Campus collaborated on a zip file extract solution to allow Infinite Campus SIS districts to easily export the necessary files for the Direct Connect to Connected Intelligence
- Columbia Falls is piloting the zip file solution. We confirmed that the files were successfully extracted and ingested in Connected Intelligence, and PowerSchool is working on the mapping logic for the data dashboards
- OPI and PowerSchool went to Kalispell for on-site consulting from 5/19-5/21; during this time, they also met with Columbia Falls and Bigfork
- An additional kickoff meeting was held with Bigfork for 6/16
- OPI attended the PowerSchool User Group meeting on 6/16 to provide an update on the project
- Several districts have expressed that they are not interested in the Direct Connect Edition
- The OPI is continuing to reach out to districts to discuss the Direct Connect Edition
- OPI has identified the MTSS settings that will be utilized for the Direct Connect Edition, and those settings have been turned over to PowerSchool to build in the system
- OPI is working on building the initial load of MTSS Intervention templates to be loaded into the Direct Connect Edition and rolled out to early pilot districts
- PowerSchool is ready to turn on the MTSS module for early pilot districts once initial intervention templates from OPI have been loaded

### **Phase III: CEDS and State Report Cards**

- The OPI and PowerSchool have templated and implemented a new Report Card site using the Community Engagement platform
- OPI was trained in development to be able to customize and further develop the Report Card site
- We are anticipating a go-live for the site in the next 1-3 weeks
- OPI and PowerSchool are leveraging our partnership to migrate existing data into CEDS-compliance

### **Upcoming Activities and Efforts**

- PowerSchool is coming on-site on June 24 to continue planning discussions to continue progress
- Weekly project status meetings between OPI and PowerSchool
- Weekly Project Manager Connects



- Weekly Business Analyst Connects to work through QA ticketing and mapping
- Ad-hoc meetings to discuss specific issues, including mapping, dashboard consulting, etc.
- Additional updates as requested by interim legislative committees
- Quarterly Education and Data Workforce Governing Board updates
- OPI and PowerSchool will continue to schedule implementation calls for districts opting in to the Analytics and Insights Direct Connect Edition
- OPI to continue inputting and responding to data load tickets
- OPI to continue dashboard QA
- OPI and PowerSchool to continue Community Engagement development conversations, including a go-live of the report card site
- OPI to develop the process to add school users to the Analytics and Insights OPI Edition
- OPI will work with PowerSchool to determine the setup for dashboards to display MAST Assessment data in both the OPI Edition and Direct Connect Edition of Analytics & Insights

## Implementation Timeline

| Date                        | Activity                                                                                           | Status      |
|-----------------------------|----------------------------------------------------------------------------------------------------|-------------|
| April 7, 2023               | Request for Proposal Release                                                                       | Completed   |
| June 20, 2023               | Vendor Tentative Award                                                                             | Completed   |
| June 30, 2023               | Contract and Statement of Work Executed                                                            | Completed   |
| July 20, 2023               | Project Kickoff Meeting (PowerSchool and OPI)                                                      | Completed   |
| July 24-27, 2023            | Organizational Change Management (OCM) Executive Interviews                                        | Completed   |
| August 9-10, 2023           | Cloud Assessment Workshops                                                                         | Completed   |
| August 14-31, 2023          | Application Assessment Workshops                                                                   | Completed   |
| August 24, 2023             | OCM Assessment Report                                                                              | Completed   |
| September 1, 2023           | Maturity Assessment Report                                                                         | Completed   |
| September 22, 2023          | Commercial-off-the-Shelf Solution, Architecture & Deployment Strategy                              | Completed   |
| October 31, 2023            | OCM Stakeholder Engagement Plan                                                                    | Completed   |
| February 20, 2024           | Connection and replication of data from State Infinite Campus to Connected Intelligence (CI)       | Completed   |
| March 29, 2024              | CI initial data load verified and begin mapping for ongoing replication                            | Completed   |
| April 24, 2024              | Complete Custom Connector analysis for PowerSchool districts (both on-premise and PS cloud-hosted) | Completed   |
| April 30, 2024              | Ongoing replication of State Infinite Campus to CI confirmed                                       | Completed   |
| May 2024-September 2024     | Analytics and Insights Customer (OPI) Education                                                    | Completed   |
| March 2024-TBD              | Connection from on-premise PowerSchool Districts to CI                                             | In Progress |
| March 2024-November 2025    | Build of Analytics and Insights Student Essentials module                                          | In Progress |
| October 2024-December 2026  | Complete standard conformance/configuration and ETL QA for dashboards                              | In Progress |
| October 2024-December 2025  | PowerSchool Dashboard QA                                                                           | In Progress |
| December 2024-December 2026 | OPI Dashboard QA                                                                                   | In Progress |



|                             |                                                                             |             |
|-----------------------------|-----------------------------------------------------------------------------|-------------|
| December 2024-November 2026 | Dashboard fitting and consulting for SIS data in Analytics and Insights     | In Progress |
| October 2025-June 2026      | State, District, and School Report Card development in Community Engagement | In Progress |
| April 2024-March 2027       | Community Engagement Module                                                 | In Progress |
| April 2024-April 2027       | Replication of Additional Data Sources into CI                              | In Progress |
| November 2024-December 2026 | Customization of Dashboards                                                 | In Progress |
| June 2027                   | Post-Deployment Assessment                                                  | Not Started |
| July 2027                   | Solution Acceptance and Sign-off                                            | Not Started |

## Education and Workforce Data Governing Board

The Education and Workforce Data Governing Board is a partnership between the Department of Labor and Industry, the Office of the Commissioner of Higher Education, and the Office of Public Instruction. Our office attends and actively participates in the regular meetings of the board and any meetings of the three subgroups established in March 2024: the Data Steward Workgroup, the Data Governance Workgroup, and the Data Research Workgroup. We are actively working on collaborative research and data governance and sharing agreements.

## Communication Planning

The Office of Public Instruction is excited to share information about this project to our stakeholders. As part of this goal, we provide regular updates in quarterly Legislative Interim Committees and Board of Public Education meetings. We also publish updates to the education community in Superintendent Weekly Messages and the OPI Monthly Current. We are also reaching out to districts to begin the implementation process for the Analytics and Insights Direct Connect platform.

Our team is always happy to answer any questions you may have about this project! Please reach out to Kellee Tjaden, Anna Hoerner, or Lucas Rowsey.

**ITEM 4**

**COMMISSIONER OF HIGHER EDUCATION**  
**REPORT**

**Dr. Angela McLean**



**Montana University System Report**  
**Montana Board of Public Education**  
**July 2026**

- **Montana University System-Rural Talent Development and Attraction Lab Rural Montana Listening Sessions Update**
- **Montana's Future at Work Phase II**

**ITEM 5**

**STUDENT REPRESENTATIVE REPORT**

**Lydia Comstock**

❖ **MSDB LIAISON – (Item 6)**

**Lisa Schmidt**

**ITEM 6**

**MSDB REPORT**

**Action Items:**

- **Action on Personnel Items**
- **Action on Pay Increase for Plan 061**

**Superintendent Paul Furthmyre**

**Montana School for the Deaf and the Blind  
Board of Public Education Report  
July 2026**

**Agenda Action Items:**

1. [Personnel Action Plan](#)  
4 Hires

**Attached Documents:**

- [MSDB Committee Bi-Monthly Meeting Agenda](#)
- [MSDB Committee Bi-Monthly Meeting Minutes](#)
- [Human Resource Plan](#)
- [HB 2 Summary Report](#)
- [HB 2 EPP Narrative](#)
- [June IEBC Quarterly Report](#)
- [June IEPC Interpreter Update](#)
- [MSDB Foundation Budget Status June](#)
- [PPE 6-12-26 Financial Report](#)
- [PPE 6-12-26 Expenditures only](#)
- [PPE 6-12-26 Payroll & Benefits only](#)
- [PPE 6-12-26 Payroll Forecast](#)
- [May Cottage Newsletter](#)



**MSDB Personnel Action for BPE Meeting  
July Meeting 2026**

MSDB asks that the board please approves the following personnel actions:

**Hire**

Jonathan Davis - Workplace and Lifeskills Teacher  
Belinda Neill - Business Manager  
Len Warren - Registered Nurse  
Taylor Santy - Registered Nurse

**Resignation**

Len Warren - LPN

**Retirement**

**Probationary Layoff**

**Nonrenewal of Nontenure Teacher**

---

**Positions currently advertised**

1 - Teacher of the Visually Impaired  
1 - Teacher of the Deaf Hard / Hearing

**Positions to be advertised**

3 - Residential Advisor 1  
4 - Teacher of the Visually Impaired Consultant  
2 - Teacher of the Deaf Outreach Consultant

| ID     | Job Title                     | Last Name   | First Name | Dept ID    | Sal Plan |
|--------|-------------------------------|-------------|------------|------------|----------|
| 012492 | Board of Education - Admin    | Alt         | Julie-Dee  | 513-EDADMN | 061      |
| 092449 | Outreach Consultant           | Anderson    | Alice      | 513-OUTRCH | 061      |
| 107426 | Board of Education - Paraprof | Andreasen   | Kendra     | 513-SUPPRT | 061      |
| 037354 | Board of Education - Prof     | Annis       | Stephanie  | 513-SUPPRT | 061      |
| 088852 | Teacher - MSDB                | Auers       | Joel       | 513-BLIND  | 061      |
| 100487 | Interpreter MSDB              | Baisch      | Erika      | 513-INTER  | 061      |
| 063454 | Teacher - MSDB                | Barr        | Erin       | 513-BLIND  | 061      |
| 025025 | Outreach Consultant           | Bateen      | Amber      | 513-OUTRCH | 061      |
| 002649 | Teacher - MSDB                | Bechard     | Staci      | 513-DEAF   | 061      |
| 105647 | Para Educator                 | Brickel     | Adam       | 513-AIDES  | 061      |
| 063629 | Board of Education - Admin    | Briggs      | Miranda    | 513-OUTRCH | 061      |
| 056376 | Board of Education - Admin    | Buska       | Donna      | 513-ADMIN  | 061      |
| 046473 | Outreach Consultant           | Cannon      | Lisa       | 513-OUTRCH | 061      |
| 012332 | Teacher - MSDB                | Clifford    | Jessteene  | 513-DEAF   | 061      |
| 092797 | Teacher - MSDB                | Cooper      | Melissa    | 513-SUPPRT | 061      |
| 040197 | Outreach Consultant           | Cross       | Michelle   | 513-OUTRCH | 061      |
| 026712 | Board of Education - Prof     | Darko       | Geri       | 513-SUPPRT | 061      |
| 100424 | Board of Education - Prof     | DeSilva     | Megan      | 513-SSADMN | 061      |
| 007278 | Board of Education - Prof     | Devlin      | Sheri      | 513-SUPPRT | 061      |
| 039635 | Teacher - MSDB                | Donovan     | Tearra     | 513-SUPPRT | 061      |
| 072903 | Board of Education - Admin    | Furthmyre   | Paul       | 513-ADMIN  | 061      |
| 027332 | Para Educator                 | Haagenson   | Christina  | 513-AIDES  | 061      |
| 049921 | Board of Education - Prof     | Hale        | Darreck    | 513-SSADMN | 061      |
| 075295 | Board of Education - Prof     | Hill        | Trudy      | 513-SUPPRT | 061      |
| 058155 | Teacher - MSDB                | Jarvey      | Miche      | 513-BLIND  | 061      |
| 104367 | Teacher - MSDB                | Jones       | Carrie     | 513-DEAF   | 061      |
| 088655 | Teacher - MSDB                | Jones       | Jaime      | 513-DEAF   | 061      |
| 037701 | Interpreter MSDB              | Joslyn      | Bonita     | 513-INTER  | 061      |
| 028045 | Board of Education - Prof     | Kauffman    | Andrew     | 513-DMS    | 061      |
| 055319 | Board of Education - Prof     | Kelly       | Theresa    | 513-SSSUB  | 061      |
| 033431 | Board of Education - Admin    | Kline       | Alissa     | 513-SSADMN | 061      |
| 065610 | Outreach Consultant           | Lesofski    | Elishya    | 513-OUTRCH | 061      |
| 006464 | Interpreter MSDB              | Loney       | Lynda      | 513-INTER  | 061      |
| 088393 | Teacher - MSDB                | Makar       | Morgan     | 513-EDUCA  | 061      |
| 011580 | Board of Education - Prof     | Mcrae       | Laurie     | 513-SUPPRT | 061      |
| 089479 | Para Educator                 | Metzenroth  | Andrew     | 513-AIDES  | 061      |
| 102123 | Outreach Consultant           | Moore       | Michelle   | 513-OUTRCH | 061      |
| 037356 | Outreach Consultant           | Norick      | Kerri      | 513-OUTRCH | 061      |
| 035066 | Teacher - MSDB                | Olson       | Kelly      | 513-DEAF   | 061      |
| 100867 | Teacher - MSDB                | Prefontaine | Cecilia    | 513-DEAF   | 061      |
| 088307 | Teacher - MSDB                | Rosenberg   | Mikhael    | 513-DEAF   | 061      |
| 039175 | Teacher - MSDB                | Rutledge    | Denise     | 513-BLIND  | 061      |
| 104115 | Interpreter MSDB              | Sessions    | Morgan     | 513-INTER  | 061      |
| 010716 | Interpreter MSDB              | Shular      | Gary       | 513-INTER  | 061      |

|        |                           |                |          |            |     |
|--------|---------------------------|----------------|----------|------------|-----|
| 025865 | Board of Education - Prof | Smail          | Yvette   | 513-SUPPRT | 061 |
| 100555 | Board of Education - Prof | Spanbauer      | April    | 513-SSADMN | 061 |
| 011636 | Para Educator             | Stewart        | Sue      | 513-AIDES  | 061 |
| 006357 | Outreach Consultant       | Tangen         | Amy      | 513-OUTRCH | 061 |
| 104480 | Para Educator             | Tesfay         | Tiffany  | 513-AIDES  | 061 |
| 006190 | Para Educator             | Thompson       | Mary     | 513-AIDES  | 061 |
| 083886 | Outreach Consultant       | Tietje         | Desiree  | 513-OUTRCH | 061 |
| 088449 | Interpreter MSDB          | Trimble        | Sarah    | 513-INTER  | 061 |
| 097141 | Interpreter MSDB          | Van Hee        | Sonja    | 513-INTER  | 061 |
| 104346 | Outreach Consultant       | Vanorsdale     | Amanda   | 513-BLIND  | 061 |
| 007520 | Interpreter MSDB          | Vantighem      | Sandra   | 513-INTER  | 061 |
| 006983 | Teacher - MSDB            | Warren         | Brenda   | 513-DEAF   | 061 |
| 007805 | Teacher - MSDB            | Wasson         | Jennifer | 513-DEAF   | 061 |
| 075948 | Board of Education - Prof | Widhalm        | Sherri   | 513-SUPPRT | 061 |
| 063443 | Teacher - MSDB            | Williams       | Melissa  | 513-DEAF   | 061 |
| 100401 | Outreach Consultant       | Wilmot         | Kacie    | 513-BLIND  | 061 |
| 080896 | Teacher - MSDB            | Witham-Travers | Naomi    | 513-EDUCA  | 061 |

MSDB / BOPE Bi-Monthly Meeting Agenda  
9:30 PM - 10:30 PM

Date: 7/7/2026

Attendees:

Meeting Objectives:

- Provide BOPE Information about all MSDB Programs
- Seek guidance from the BOPE

Future Agenda Items:

| Program        | Agenda Items                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Items Needing Follow-Up                                                                                                                                                   |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Administration | <ul style="list-style-type: none"> <li>• <a href="#">Personnel Action Plan</a></li> <li>• <a href="#">Human Resource Plan</a></li> <li>• 2027 Legislative Session                             <ul style="list-style-type: none"> <li>○ HB 2 EPP Requests                                     <ul style="list-style-type: none"> <li>■ <a href="#">Summary Report</a></li> <li>■ <a href="#">EPP Narrative</a></li> </ul> </li> </ul> </li> <li>• June Interim Education Budget Committee                             <ul style="list-style-type: none"> <li>○ <a href="#">Quarterly Report</a></li> <li>○ <a href="#">Interpreter Update</a></li> </ul> </li> <li>• Summer Activities Completed                             <ul style="list-style-type: none"> <li>○ Combined Family Learning Weekend</li> <li>○ Transition Camp</li> <li>○ Sense-ational Sports Camp</li> <li>○ Deaf Camp</li> </ul> </li> <li>• Foundation Update                             <ul style="list-style-type: none"> <li>○ <a href="#">Current Year Budget</a></li> <li>○ Books Closed and Given to Auditor</li> <li>○ Projects                                     <ul style="list-style-type: none"> <li>■ Cottage Refresh Project</li> <li>■ MSDB Museum</li> </ul> </li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• Action Items Needed                             <ul style="list-style-type: none"> <li>○ Personnel Action</li> </ul> </li> </ul> |

|                     |                                                                                                                                                                                                                                                                                                                                                                                           |  |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Business Office     | <ul style="list-style-type: none"> <li>• <a href="#">PPE 6-12-26 Financial Report</a></li> <li>• <a href="#">PPE 6-12-26 Expenditures only</a></li> <li>• <a href="#">PPE 6-12-26 Payroll &amp; Benefits only</a></li> <li>• <a href="#">PPE 6-12-26 Payroll Forecast</a> <ul style="list-style-type: none"> <li>○ Retirement Payouts Included in Payroll Forecast</li> </ul> </li> </ul> |  |
|                     |                                                                                                                                                                                                                                                                                                                                                                                           |  |
| Residential         | <ul style="list-style-type: none"> <li>• <a href="#">May Cottage Newsletter</a></li> </ul>                                                                                                                                                                                                                                                                                                |  |
|                     |                                                                                                                                                                                                                                                                                                                                                                                           |  |
| Education: School   | <ul style="list-style-type: none"> <li>•</li> </ul>                                                                                                                                                                                                                                                                                                                                       |  |
|                     |                                                                                                                                                                                                                                                                                                                                                                                           |  |
| Education: Outreach | <ul style="list-style-type: none"> <li>•</li> </ul>                                                                                                                                                                                                                                                                                                                                       |  |

## **Board of Public Ed Meeting**

### **BOPE Meeting - Summary- July 7, 2026**

Those in attendance - Paul Furthmyre, Lisa Schmidt, Donna Schmidt, Jacquie Fogerty

**Absent:** Tim Tharp, Julia Maxwell, Alissa Kline, Miranda Briggs, Julie-Dee, McCall Flynn

**Guest:** Jacquie Fogerty - Human Resource Generalist II

Note Taker – Paula Mix

#### **Meeting Objectives:**

- Provide BOPE information about all MSDB Programs
- Seeking guidance from the BOPE
  
- **Action Items Needed**
  - Personnel Action

#### **Administration - Paul Furthmyre**

- Paul introduced the new Human Resource Generalist. Went over the personnel action plan highlighting two new hires - one new hire for the LEAP program and a new business manager replacing the current business manager who will be retiring in April. Our LPNs were reclassified to RN positions and the personnel action plan included two RN hires. Efforts continue to fill vacancies and reclassify roles to better meet the school's needs. Asking the Board's approval.
- The team reviewed their 2027 Legislative session requests, including funding for the HR generalist position, costly math materials due to specialized formats, technology upgrades, transport vehicle needs, and extracurricular stipends. While most items have good support, the high cost of math materials may face cuts. Positive engagement was noted with state budget officials.
- The Interim Education Budget Committee quarterly financial report was straightforward with no legislative questions. Interpreter training funded by the legislature saw low external participation but led to improved certification scores for staff. Plans are underway to create a stronger pipeline for future interpreter recruitment through university partnerships.
- Our Summer programs, including a combined DHH & VI Family Learning Weekend, transition camp, and sense-ational (VI) sports camp, deaf camp. All were successful and well received by families and staff. Scheduling adjustments are planned next year to reduce family travel and encourage participation for next year's camps.
- HR Recruitment and Retention Plan: The Human Resource Generalist presented a detailed recruitment and retention plan focusing on attracting high-quality candidates and retaining current staff. Key strategies include launching a LinkedIn presence, strengthening college relationships, standardizing hiring communication, and tracking recruitment metrics to improve outcomes.

The group expressed strong support for the LinkedIn strategy and emphasized the importance of proactive and ongoing relationships with universities and career fairs. Budget considerations for recruitment activities were discussed, with plans to fill critical vacancies and deploy outreach consultants starting in October.

- Foundation budget remains stable with typical unspent funds due to cancelled trips. Projects such as the cottage refresh and museum documentation are progressing.
- The parking lot renovation were delayed due to weather and infrastructure issues but continues to move forward.

#### **Business Office - Donna Schmidt**

- Donna reported an update showing some negative balances in personnel and operating expenses, with budget change documents submitted to address them. Payroll and grant coding improvements are underway. The fiscal year is expected to end with a positive carry forward, though next year may be tighter due to upcoming retirements and payouts. Plans for using carry forward funds include security upgrades and equipment purchases.

#### **Residential -**

- The May Cottage News letter was attached and will go over it during the Sept. meeting.

#### **Education: School**

#### **Education: Outreach**

#### **Upcoming Dates:**





# MONTANA SCHOOL FOR THE DEAF & THE BLIND

## HR RECRUITMENT & RETENTION PLAN

PRESENTATION – JULY 2026

Prepared By:  
**Jacquie Fogerty**

Prepared For:  
**MSDB Administrator & The Board**



PAGE 1






### Mission

To be Montana's leading resource for the stakeholders of MSDB by providing support & services that empower individuals to attain their highest potential.



### Vision

To foster the learning and growth of the whole-child with a hearing and/or vision loss, preparing them to become successful citizens.



...use of the Ar.  
...m opportunity." -Preside

PAGE 2 |

## Executive Summary

**PURPOSE:**  
*Establish a strategic recruitment & retention plan that:*

- Attracts high quality candidates
- Reduces vacancy timelines
- Builds employer brand awareness
- Supports workforce stability
- Creates a consistent applicant experience
- Retain high performing employees

**SUCCESS MEASURES:**

- Increased applicant pool
- Reduced time-to-fill
- Improved quality hires
- Increased applicant engagement
- Increased retention of high performing employees



PAGE 3 |

## Current State Assessment

**STRENGTHS:**

- ✓ Mission-driven organization
- ✓ State Employment Benefits
- ✓ Unique educational environment
- ✓ Lower cost of living

**WEAKNESSES:**

- ⚠ Specialized positions
- ⚠ Rural/ Out-of-state- recruitment market
- ⚠ Competition for educators & support staff
- ⚠ Limited employer brand awareness



## Recruitment Goals



### Objective:

Attract qualified, mission-driven candidates to support work force needs.

### Strategic Focus:

- Promote MSDB's mission & culture
- Showcase employee experiences
- Optimize job advertisements
- Develop on-going talent pipeline
- Strengthen hiring manager collaboration

| GOAL                      | SUCCESS MEASURE                                       |
|---------------------------|-------------------------------------------------------|
| Increase Applicant Pool   | More qualified applicants per vacancy                 |
| Improve Candidate Quality | Higher percentage of interview-ready candidates       |
| Enhance Employer Brand    | Increased LinkedIn engagement & career interest       |
| Reduce Time-to-Fill       | Faster hiring process from posting to selection       |
| Expand Talent Pipelines   | Build & maintain relationships with candidate sources |

## Retention Goals



### Objective:

Increase employee engagement, satisfaction, and long-term retention.

### Strategic Focus:

- Structured onboarding program
- New employee check-ins
- Employee recognition initiatives
- Professional development opportunities
- Workforce engagement and communication

| GOAL                          | SUCCESS MEASURE                                     |
|-------------------------------|-----------------------------------------------------|
| Improve employee experience   | Increased employee feedback & engagement            |
| Strengthen onboarding         | Successful first-year retention rates               |
| Support professional growth   | Increase participation in development opportunities |
| Increase employee recognition | Improved morale and workplace culture               |
| Reduce turnover               | Lower voluntary separation rates                    |

## HR Communication Strategy

### Internal

- Build strong partnerships with hiring managers
- Vacancy planning meetings
- Workforce planning discussions
- Recruitment status updates



### External

- Use of LinkedIn for recruitment
- Job posting optimization
- Employee success stories
- Recruitment campaigns/Career fairs

## HR LinkedIn Strategy

### Weekly Schedule (Example)

- Mon** Employee Spotlight or Good News/Event Story
- Wed** Why Work At MSDB? Highlight Benefits, Work Hours, the local area, Ect.
- Fri** Open Position - Brief Descrip & link to State of MT job site
- MISC** Leadership Feature, Employee Testimonial, Mission Impact, New Hire Spotlights





## Recruitment Funnel



## Annual Recruitment Planning Chart

| Quarter 1   July - September     | Quarter 2   October - December                                          |
|----------------------------------|-------------------------------------------------------------------------|
| Administrative Staff Recruitment | Review Teacher & Specialist Vacancies/ Staffing for Following Year      |
| Quarter 3   January - March      | Quarter 4   April - June                                                |
| Teacher & Specialist Recruitment | End of April all decisions for hiring/firing made<br>Board meets in May |

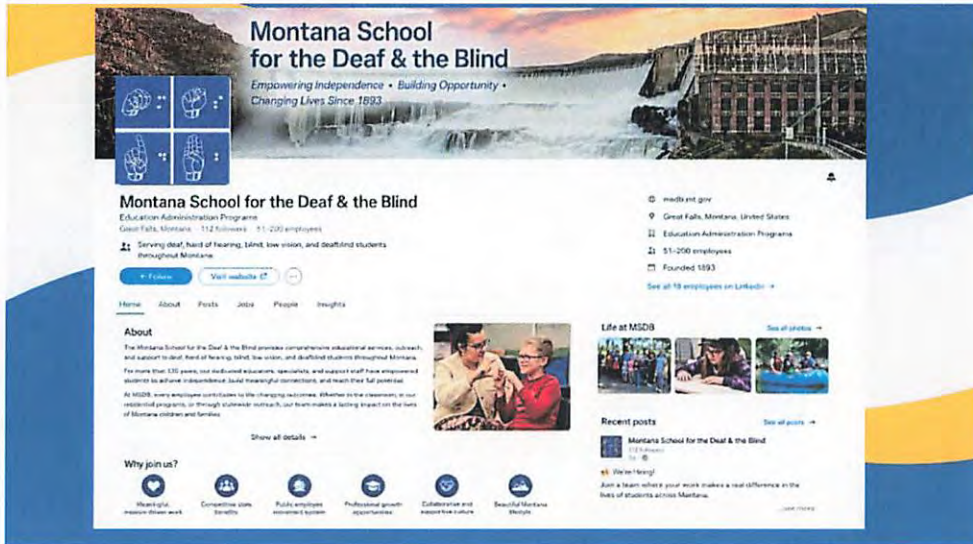
## Success Metrics Dashboard

|                               |                           |                                |
|-------------------------------|---------------------------|--------------------------------|
| Vacancy Rate<br>--            | Time-to-Fill<br>--        | Applications per Posting<br>-- |
| Interview-to-Hire Ratio<br>-- | LinkedIn Engagement<br>-- | Candidate Satisfaction<br>--   |

## Recommendations & Next Steps

- Immediate Priorities**
  - Establish recruitment brand/ College Relationships
  - Launch MSDB LinkedIn
  - Standardize hiring communications
  - Develop recruitment metrics dashboard
  - Create annual workforce planning cycle
- Requested Leadership Support**
  - Department participation
  - Hiring manager engagement
  - Recruitment marketing support when needed
  - Workforce planning collaboration





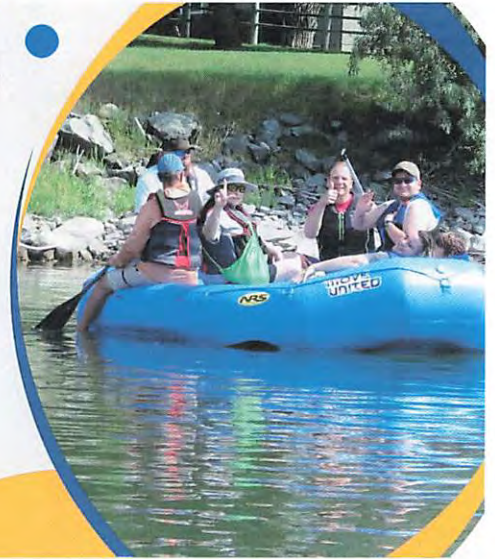
## MONTANA SCHOOL FOR THE DEAF & THE BLIND

# THANK YOU

Any Questions?

Contact: Ms. Jacquie Fogerty

[jfogerty@msdb.k12.mt.us](mailto:jfogerty@msdb.k12.mt.us)



**EPP**  
**Agency Summary By Priority**

Version: 2029-C01-51130

Date: 06/29/2026  
Time: 12:58:20

| Priority                            | Type | EPP<br>Req # | Request Name                                        | Status | Prog.# | Fiscal Year 2028 |              |       | Fiscal Year 2029 |              |       |
|-------------------------------------|------|--------------|-----------------------------------------------------|--------|--------|------------------|--------------|-------|------------------|--------------|-------|
|                                     |      |              |                                                     |        |        | FTE              | General Fund | Other | FTE              | General Fund | Other |
| 51130 - SCHOOL FOR THE DEAF & BLIND |      |              |                                                     |        |        |                  |              |       |                  |              |       |
| 1                                   | NP   | 51301        | Human Resource Generalist II                        |        |        |                  |              |       |                  |              |       |
|                                     |      |              | Approved                                            |        | 01     | 1.00             | \$96,730     | \$0   | 1.00             | \$96,730     | \$0   |
| 2                                   | NP   | 51302        | Math Materials Update                               |        |        |                  |              |       |                  |              |       |
|                                     |      |              | Approved                                            |        | 04     |                  | \$216,000    | \$0   |                  | \$0          | \$0   |
| 3                                   | NP   | 51303        | Technology Rotation Fund                            |        |        |                  |              |       |                  |              |       |
|                                     |      |              | Approved                                            |        | 01     |                  | \$30,000     | \$0   |                  | \$30,000     | \$0   |
| 4                                   | NP   | 51304        | Funding for 2 Class 04 Leased Vehicle Rcvd in FY26. |        |        |                  |              |       |                  |              |       |
|                                     |      |              | Approved                                            |        | 03     |                  | \$78,670     | \$0   |                  | \$78,670     | \$0   |
| 5                                   | NP   | 51305        | 2 Additional Motor Pool Class 04 Large SUV leases   |        |        |                  |              |       |                  |              |       |
|                                     |      |              | Approved                                            |        | 03     |                  | \$78,670     | \$0   |                  | \$78,670     | \$0   |
| 6                                   | NP   | 51306        | Maintenance Truck with V-Plow                       |        |        |                  |              |       |                  |              |       |
|                                     |      |              | Approved                                            |        | 02     |                  | \$50,000     | \$0   |                  | \$0          | \$0   |
| 7                                   | NP   | 51307        | Extracurricular Compensation                        |        |        |                  |              |       |                  |              |       |
|                                     |      |              | Approved                                            |        | 04     |                  | \$34,263     | \$0   |                  | \$34,263     | \$0   |
| Agency Totals                       |      |              |                                                     |        |        | 1.00             | \$584,333    | \$0   | 1.00             | \$318,333    | \$0   |

**MSDB EPP Budget Requests  
Legislative Session January 2027**

**Combination of Programs**

|                                     |                 |
|-------------------------------------|-----------------|
| Technology Rotation Fund (Per Year) | \$30,000        |
| <b>Biennium Total:</b>              | <b>\$60,000</b> |

**Program 1: Administration**

|                                                   |                  |
|---------------------------------------------------|------------------|
| Human Resource Generalist III Position (Per Year) | \$101,708        |
| <b>Biennium Total:</b>                            | <b>\$203,416</b> |

**Program 2: General Services**

|                                     |                 |
|-------------------------------------|-----------------|
| Maintenance Truck with V-Plow (OTO) | \$50,000        |
| <b>Biennium Total:</b>              | <b>\$50,000</b> |

**Program 3: Student Services**

|                                                             |                  |
|-------------------------------------------------------------|------------------|
| 2 Additional Motor Pool Class 04 Large SUV Lease (Per Year) | \$78,670         |
| <b>Biennium Total:</b>                                      | <b>\$157,340</b> |

**Program 4: Education**

|                                         |                  |
|-----------------------------------------|------------------|
| Extracurricular Compensation (Per Year) | \$34,263         |
| Math Materials Update (OTO)             | \$216,000        |
| <b>Biennium Total:</b>                  | <b>\$284,526</b> |

|                                     |                         |
|-------------------------------------|-------------------------|
| <b><u>Biennium Grand Total:</u></b> | <b><u>\$755,282</u></b> |
| Year 1 Total                        | \$510,641               |
| Year 2 Total                        | \$244,641               |

## **Combination of Programs**

### **Technology Rotation Fund (\$30,000 per year) - NP**

This general fund request is to develop a budget for rotation of technology for the business and educational functions of the school by making the funding a permanent part of the schools budget. The school has relied on grants to update purchases of computer desktops, laptops, chromebooks, and iPads. The school has further relied on carryforward funds and/or current budget to purchase random hardware equipment such as printers, servers, and network switches. This additional money will ensure that the school can develop a five (5) year plan and rotational plan. With an implemented plan, the school can make smart decisions on technology.

All aspects of the school rely on up-to-date and reliable technology. The Education Program is the largest user of the technology. MSDB's mission is to prepare the students to become successful citizens by fostering the learning and growth of the whole-child. We strive to be Montana's leading resource for all of the state by providing support and services that empower individuals to meet their highest potential. The outreach uses mobile technology to visit students around the state while documenting their successes and needs. The campus provides technology instruction to the students to ensure they are proficient at using assistive technology for life. MSDB also provides loan equipment to students around the state to assist with accessibility. With the rapid landscape changes in technology, the hardware infrastructure needs to accommodate the needs of those students.

## **Program 1 Biennium Asks**

### **Human Resource Generalist III Position (\$101,708 per year) - NP**

This general fund request is to add an additional 1.0 PB to the Administration Program to lead the Human Resource efforts at MSDB. The school has relied on various personnel to complete the duties of a human resource specialist. The school currently has 117 staff members that work at the school. This number does not include the many substitutes, family advisors, and deaf mentors that work for the school under aggregated position numbers. In total, MSDB has 89.27 budgeted positions in the current budget.

Without a dedicated human resource position, the school is left with a void. MSDB does not have anyone that provides operational HR expertise and solutions, nor does the school have someone that understands the variety of HR functional areas. The school administration is left to spend a majority of their time addressing employee issues, such as harassment allegations, work complaints, or other employee concerns. This creates a void in the educational services of the school.



## **Program 2 Biennium Asks**

### **Maintenance Truck with V-Plow (\$50,000) - OTO**

This one time only budget request is to help the school meet the needs of clearing snow in the parking lot and driveway areas on the grounds by purchasing a used truck, along with a plow and truck package V-Plow. The school currently has a 1999 Ford 150 with a 90-inch straight blade snow plow. The switch in the cab of the truck shorts out frequently and leaves the school without proper equipment to clear the parking lots. If the school receives more than an inch of snow, it takes a considerable amount of time to clear.

The multi-functional design plow will allow maintenance staff to clear snow in a timely manner with precision windrowing, excellent stacking, and more stable breaking power. This will help the school with workers compensation claims. In 2023, 2024, and 2025; the loss event data provided by the Workers Compensation Management Bureau shows a total loss of \$115,267.03 with slip - trip - falls being the highest loss event. Nearly all of these events were due to the lack of snow removal in the parking lot. This is not a result of lack of effort by maintenance staff as they have to clear all sidewalks, driveways, and parking lots. The sidewalks take precedence as our visually impaired students walk on the sidewalks all day and cannot often decipher where the edge of the sidewalk is because of the snow. With a large plow and truck, we will be able to clear the snow in the parking lot much faster.

## **Program 3 Biennium Asks**

### **2 Additional Motor Pool Class 04 Large SUV (\$78,670 per year)**

## **Program 4 Biennium Asks**

### **Extracurricular Stipends (\$34,263 per year)**

These funds pay stipends to staff for sponsoring sports, clubs and class sponsors. Without this funding participation in these events for our kids would not be possible. This allows the students at our school to participate in extracurricular activities like their peers who attend public schools.

This is an increase of \$3888 from the last biennium due to negotiations.

### **Math Materials Update (\$216,000) - OTO**

These one time only funds would update the materials used in all math classrooms at MSDB. The current materials are outdated and not aligned to the Montana State Standards. The school utilized the guidance provided by the Montana Office of Public Instruction to identify high-quality instructional materials (HQIM) that fit the unique needs of our student population. This included identifying materials that provided student and teacher support that would keep rigor and balance of the math.

The population of students at MSDB is unique as identified by our mission. Therefore, the updated materials that would be purchased would provide for linear progression of math topics from early education to high school (12 different bands). The purchase would include the teacher edition packages, teacher masters package, manipulative kits, and textbooks for each band. This portion of the purchase would cost close to \$36,000. The extra costs will come from making sure the school provides the material in appropriate reading mediums for our students, mainly large print or braille. Most braille textbooks are around \$5,000 and large print \$2,500. Therefore, the anticipated cost to make two (2) sets of materials accessible is \$120,000 (braille textbooks and \$60,000 (large print). MSDB lends out to public schools in Montana the accessible books if they are not being used by students on campus.

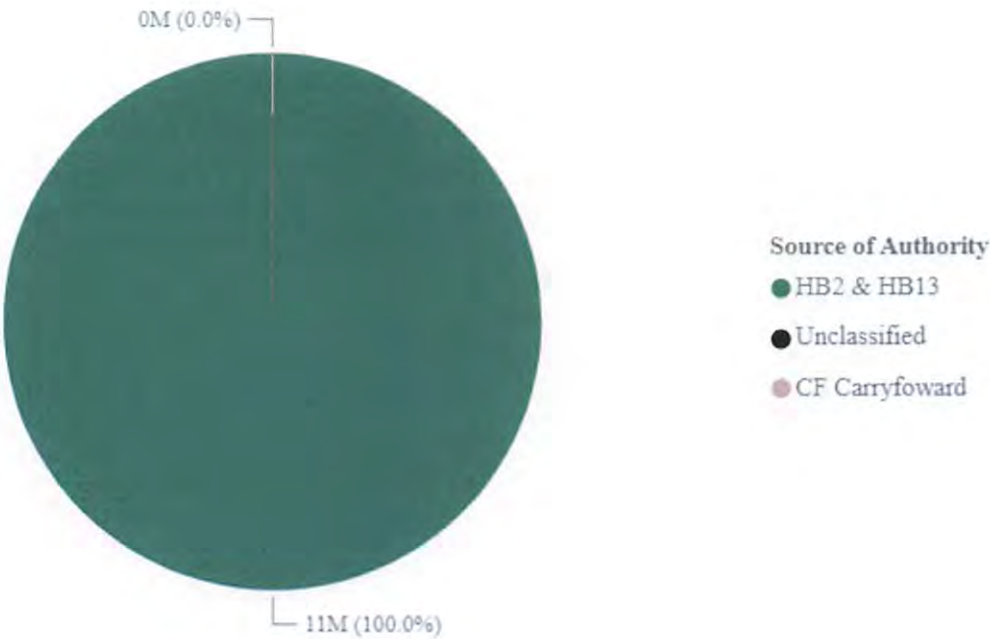


# MONTANA SCHOOL FOR THE DEAF AND BLIND

## TOTAL APPROPRIATION AUTHORITY

The total appropriation authority for the Montana School for the Deaf and Blind is shown in the pie chart below. HB 2 and HB 13 provide nearly 100.0% of the total authority for this agency. All types of appropriation authority for this agency are described below, including total budget and the percent expended by source of authority.

Total Modified Budget by Source of Authority



| Source of Authority | Modified Budget | Expended Budget | % Expended |  |
|---------------------|-----------------|-----------------|------------|--|
| HB2 & HB13          | 10,915,263      | 9,072,549       | 83.1%      |  |
| CF Carryforward     | 1,061           | 1,040           | 98.0%      |  |
| Unclassified        | 2,150           |                 |            |  |
| Total               | 10,918,474      | 9,073,588       | 83.1%      |  |

## Carryforward Authority

The Montana School for the Deaf and Blind has carryforward authority of approximately \$1,000, which is less than 0.1% of the total appropriation authority. As of May 31, 2026, the agency spent 98.0% of its carryforward authority on computer monitors.

## Unclassified

The agency has \$2,200 of unclassified appropriation authority because of lower workers' compensation premiums. Per 39-71-403(1)(b)(iv), MCA, when workers' compensation premiums are lower than the previous

year, state agencies shall reduce personal services appropriations by the amount of the premium reduction. The reductions are included in the accounting system as unclassified authority that will not be spent by the agency.

## HB 2 BUDGET MODIFICATIONS

The following chart shows the HB 2 budget, including the pay plan, and the HB 2 modifications to the budget from March 1, 2026 through May 31, 2026. Net modifications to the budget include operating plan changes from one expenditure account to another, program transfers, reorganizations, and agency transfers of authority. The **positive modifications** and **negative modifications** are shown by program, expenditure account, and fund type.

### Legislative Budget Compared to Modified Budget - HB 2 Only

| Agency Name                   | HB 2 Budget       | Modified Budget   | Net Modifications |
|-------------------------------|-------------------|-------------------|-------------------|
| ☐ School for the Deaf & Blind | 10,915,263        | 10,915,263        | 0                 |
| <b>Total</b>                  | <b>10,915,263</b> | <b>10,915,263</b> | <b>0</b>          |

| Expenditure Type           | HB 2 Budget       | Modified Budget   | Net Modifications |
|----------------------------|-------------------|-------------------|-------------------|
| ☐ 61000 Personal Services  | 9,662,390         | 9,418,188         | -244,202          |
| ☐ 62000 Operating Expenses | 1,190,258         | 1,434,460         | 244,202           |
| ☐ 68000 Transfers-out      | 1,000             | 1,000             |                   |
| ☐ 69000 Debt Service       | 61,615            | 61,615            |                   |
| <b>Total</b>               | <b>10,915,263</b> | <b>10,915,263</b> | <b>0</b>          |

| Fund Type               | HB 2 Budget       | Modified Budget   | Net Modifications |
|-------------------------|-------------------|-------------------|-------------------|
| 01 General              | 10,402,736        | 10,402,736        | 0                 |
| 02 State Other Spec Rev | 305,735           | 305,735           |                   |
| 03 Fed Other Spec Rev   | 206,792           | 206,792           | 0                 |
| <b>Total</b>            | <b>10,915,263</b> | <b>10,915,263</b> | <b>0</b>          |

The Montana School for the Deaf and Blind's FY 2026 HB 2 modified budget totals \$10.9 million, and the agency's budget modifications made between March 1, 2026 and May 31, 2026 total \$244,000.

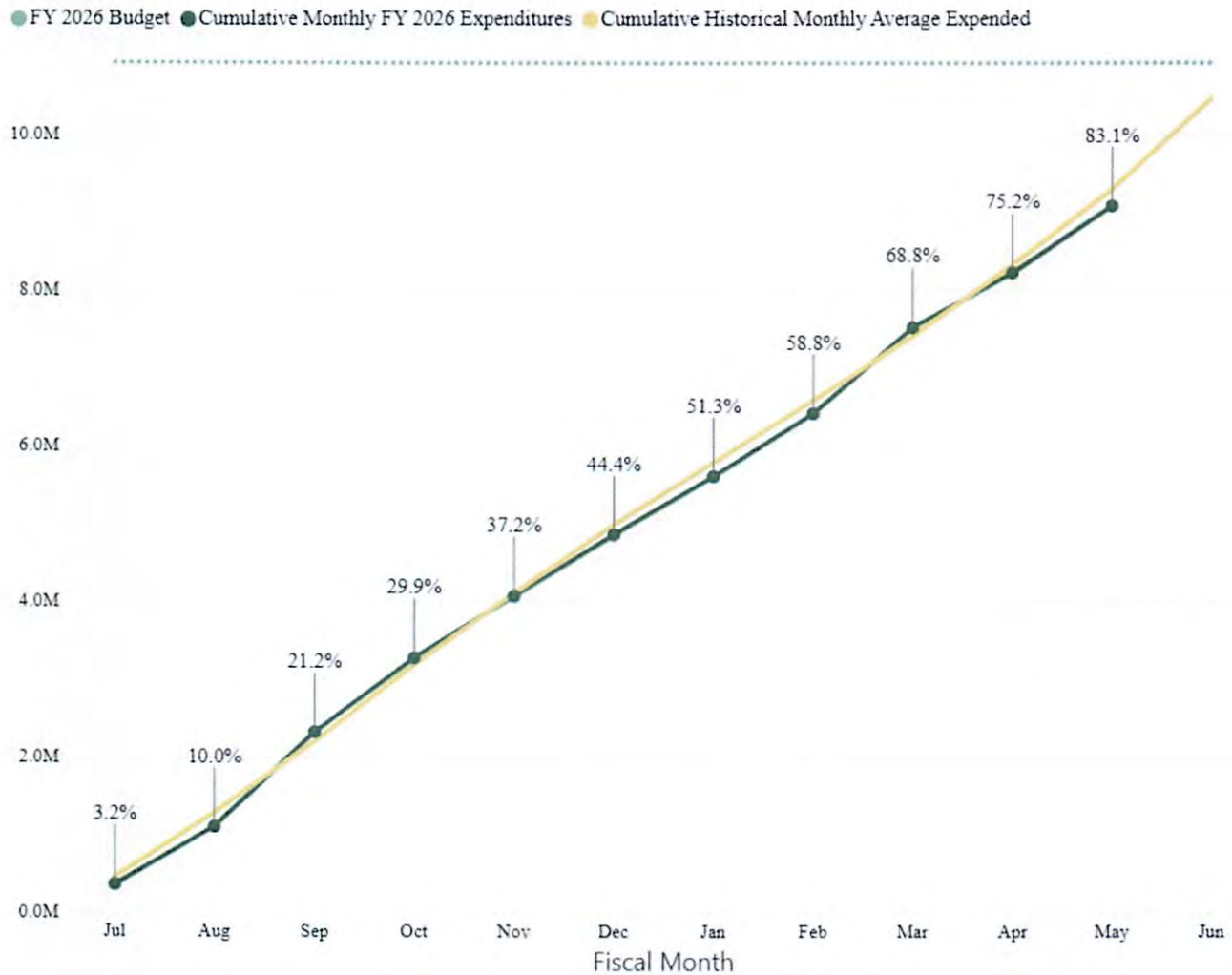
Notable budget modifications include:

- Moving \$5,798 of outreach grant funds from operating expenses to personal services
- Moving \$250,000 of personal services authority in the education program to operating expenses in the administration, general services, and education programs. The agency requested to transfer the appropriation because it had a few positions in the education program remain vacant for the fiscal year but higher building maintenance and repair, utilities, educational supplies, and travel costs than anticipated

## HB 2 APPROPRIATION AUTHORITY

The following chart shows the agency's appropriated budget compared to historical expenditures through May 31, 2026.

### Monthly Expenditures Compared to Historical Average



| Program Name              | Modified Budget   | Expended Budget  | % Expended   |
|---------------------------|-------------------|------------------|--------------|
| 01 ADMINISTRATION PROGRAM | 882,829           | 798,149          | 90.4%        |
| 02 GENERAL SERVICES       | 821,374           | 653,883          | 79.6%        |
| 03 STUDENT SERVICES       | 2,290,049         | 1,879,016        | 82.1%        |
| 04 EDUCATION              | 6,921,011         | 5,741,501        | 83.0%        |
| <b>Total</b>              | <b>10,915,263</b> | <b>9,072,549</b> | <b>83.1%</b> |

| Expenditure Type   | Modified Budget   | Expended Budget  | % Expended   |
|--------------------|-------------------|------------------|--------------|
| Personal Services  | 9,418,188         | 8,007,392        | 85.0%        |
| Operating Expenses | 1,434,460         | 1,065,157        | 74.3%        |
| Transfers-out      | 1,000             |                  |              |
| Debt Service       | 61,615            |                  |              |
| <b>Total</b>       | <b>10,915,263</b> | <b>9,072,549</b> | <b>83.1%</b> |

| Fund Type               | Modified Budget   | Expended Budget  | % Expended   |
|-------------------------|-------------------|------------------|--------------|
| 01 General              | 10,402,736        | 8,859,079        | 85.2%        |
| 02 State/Other Spec Rev | 305,735           | 129,922          | 42.5%        |
| 03 Fed/Other Spec Rev   | 206,792           | 83,547           | 40.4%        |
| <b>Total</b>            | <b>10,915,263</b> | <b>9,072,549</b> | <b>83.1%</b> |

The Montana School for the Deaf and Blind spent 83.1% of its \$10.9 million HB 2 modified budget through May 31, 2026, which is in line with the 5-year Olympic average of 85.1%. The Olympic average percentage shows the average historical spending patterns over a seven-year period with the highest and lowest years' expenditures removed.

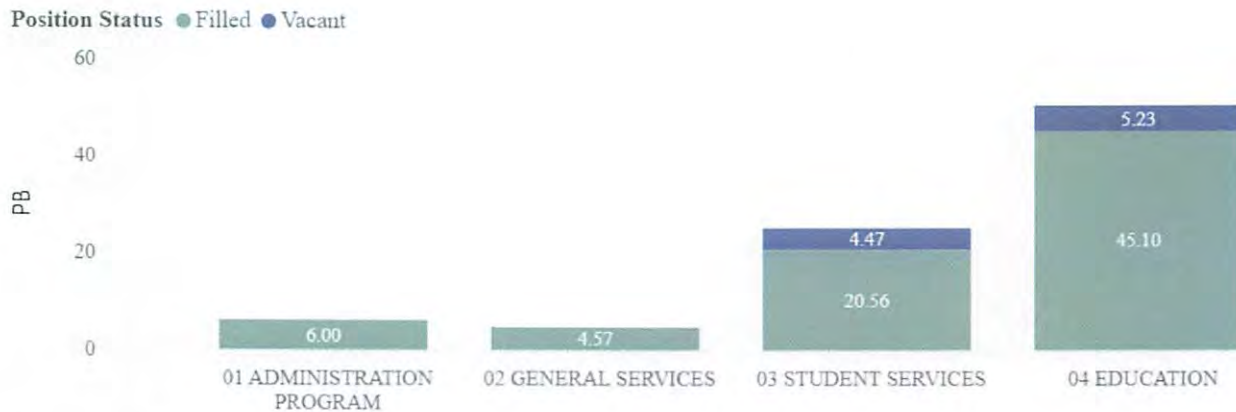
Program expenditures are normal at this point in the fiscal year, as are expenditures for personal services and operating expenses. The agency notes that the \$1,000 modified budget for transfers-out was mistakenly added to the agency's budget this biennium for a loan that was paid off; the agency does not plan to spend the \$1,000. The agency also reports that it will spend the \$62,000 debt service budget at the end of FY 2026 on an annual loan payment for a project to replace the school's boilers and install LED light fixtures and lights on campus.

The agency has received less federal special revenue authority for the Pre-Employment Transition Services (Pre-ETS) grant, newborn hearing screening grant, and IDEA Part B outreach grant than was budgeted in HB 2 for this fiscal year. As a result, the agency has spent less than its appropriated federal special revenue modified budget. The agency also anticipates having \$42,000 of unspent general funds from the interpreter professional development program.

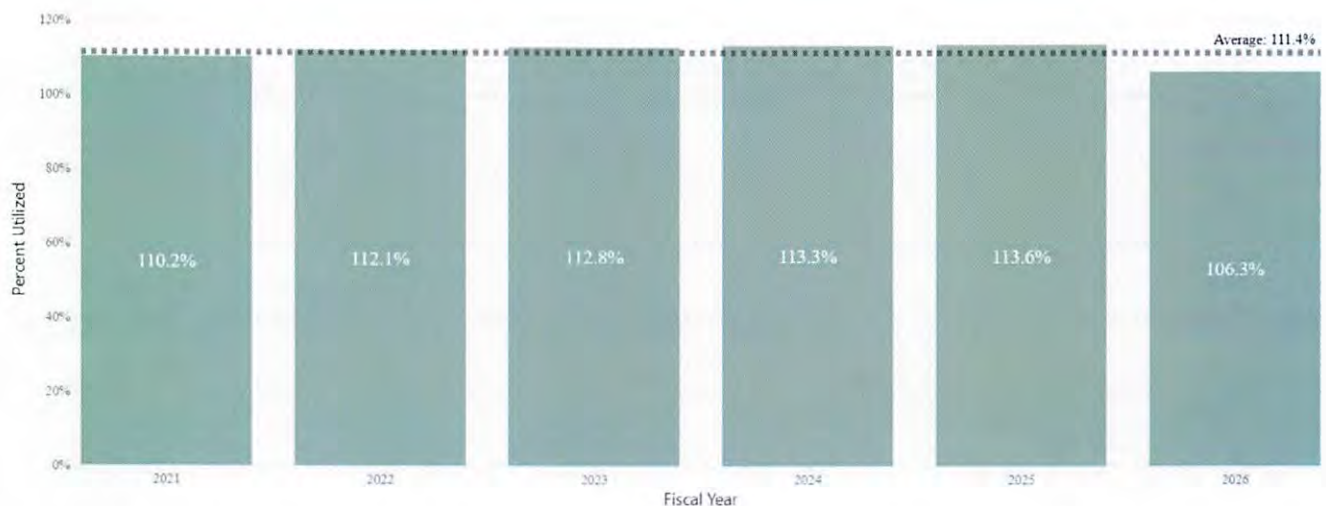
### Personal Services

The agency's appropriations for personal services total \$9.4 million and are 85.0% expended through May 31, 2026. The following chart shows the agency's filled and vacant HB 2 positions budgeted (PB) as of May 1, 2026. At that time, the department had 85.93 HB 2 PB, and 88.7% of these positions were filled.





The chart below shows the Montana School for the Deaf and Blind's percent of available hours utilized in FY 2026 and the prior five fiscal years. The agency has utilized 106.3% of its FY 2026 hours budgeted as of May 1, 2026. Historically, the agency's actual hours utilized exceed the hours budgeted because positions in the education program are often reported as less than 1.00 PB (teachers' positions are generally budgeted as 0.73 PB) to reflect the school calendar. However, education positions are paid throughout the fiscal year, and this accounting discrepancy between budgeted PB hours and paid hours creates a budgeted hours utilization rate that consistently exceeds 100.0%.



The chart below shows the vacant PB by program, the number of months each position has been vacant, and the position midpoint hourly pay rate. Of the 9.70 PB that are vacant, 8.93 PB have been vacant for longer than five months. The agency has worked with the state human resources department to reclassify vacant positions and move them into different programs – the licensed practical nurse positions were reclassified as registered nurse positions, and 1.54 PB of the residential advisor positions were reclassified as paraeducators and moved to the education program. The agency reports that it has recruited and hired two registered nurses locally. A school psychologist and a teacher have been hired to begin work in the fall for the 2026-2027 school year, and the agency reports that it will continue recruiting over the summer to fill the vacant residential advisors, paraeducators, and teachers positions ahead of the upcoming school year. The agency reports that it will begin recruiting for the vacant outreach consultant positions in October 2026.

## Vacant Positions Report

| DEPT NUM/NAME                         | PB          | Median Months Vacant | Market Midpoint (Hourly) |
|---------------------------------------|-------------|----------------------|--------------------------|
| ⊖ 51130 SCHOOL FOR THE DEAF AND BLIND | 9.70        | 10.07                |                          |
| ⊖ 03 STUDENT SERVICES                 | 4.47        | 9.84                 | 16.44                    |
| Licensed Practical Nurse 2            | 0.77        | 0.92                 | 23.39                    |
| Residential Advisor                   | 3.70        | 10.98                | 16.44                    |
| ⊖ 04 EDUCATION                        | 5.23        | 10.07                |                          |
| Outreach Consultant                   | 3.04        | 5.25                 |                          |
| School Psychologist                   | 0.73        | 29.34                |                          |
| TEACHER-MSDB                          | 1.46        | 10.07                |                          |
| <b>Total</b>                          | <b>9.70</b> | <b>10.07</b>         |                          |



## Montana School for the Deaf and the Blind Educational Interpreting Professional Development June 2026 EIBC Update

**Scope of Project:** To provide quality professional development for educational interpreters serving students in all Montana districts. This is to be accomplished with collaboration from Rochester Technical Institute, specifically the National Technical Institute for the Deaf within the university.

### Goals for Year 1

**Objective 1:** Provide in-person professional development to all educational interpreters in Montana with STEM interpreting concepts and terminology. The workshops are presented by RIT staff on the MSDB campus. This included workshops in the following:

**Objective 1 Outcomes:** A total of eight (8) Montana educational interpreters participated in the summer workshops. Seven (7) of the interpreters were connected to The Montana School for the Deaf and the Blind and one (1) from the Bozeman Area. The participants received instruction with the four (4) identified workshops. Overall impressions from the participants was that although the content was good, they had wished a deaf instructor would have presented.

All activities for Objective 1 were completed in July 2025.

**Objective 1 for Year 1 Total Cost:** \$2,350  
(Updated 6/5/26 to Reflect Correct Number)

---

**Objective 2:** Provide mentoring to educational interpreters working in Montana public schools. Interpreters will be matched up with RIT experienced interpreters for one year. The mentoring will be administered in a hybrid fashion (in-person and remote). The participants will be expected to participate in the following activities throughout the year:

1. In-Person Mentoring Program Start (August 2025)
2. Monthly Online Workshops (September 13, October 4, November 8, December 6, January 10, February 28, March 14, April 11, and May 2)
3. Bi-weekly 1:1 Supervision
4. Bi-weekly Participant Meetings

### Objective 2 Anticipated Costs

|                         |         |
|-------------------------|---------|
| EIPA Pre and Post Tests | \$4,000 |
|-------------------------|---------|



|                                                                                     |                 |
|-------------------------------------------------------------------------------------|-----------------|
| Technology for Participants                                                         | \$15,000        |
| (Includes laptops for online mentoring, equipment for videoing and self reflection) |                 |
| Mentor Costs                                                                        | \$10,000        |
| Travel Costs - Mentors and Mentees                                                  | \$10,000        |
| (Flights, per mile reimbursement)                                                   |                 |
| Meals during in-person trainings                                                    | \$5,000         |
| Stipends for Interpreters                                                           | \$20,000        |
| <u>Total</u>                                                                        | <u>\$64,000</u> |

**Objective 2 Actual Total Costs (As of 12/5/25)**

|                                    |                          |
|------------------------------------|--------------------------|
| Travel Costs - Mentors and Mentees | \$242                    |
| Technology                         | \$10,868                 |
| <u>Total</u>                       | <u>\$11,110</u>          |
| % Spent                            | 17% of Anticipated Costs |

**Objective 2 Notes:** Participants had to be currently working with a Montana school district to participate in the mentoring program. The program currently has 5 mentees out of the anticipated 8. Four of the mentees are MSDB educational interpreters that have EIPA scores below 3.5, per the mentoring requirement. Participants for this year's program were selected from participation in the summer workshop series.

**Objective 2 Dec Update:** We will begin recruiting for year 2 mentees after the first of the year. We have been in contact with a couple of larger districts that employ interpreters that seem interested in the mentoring program. Depending on the EIPA scores of the current participants, we don't anticipate that they will continue in the mentoring program as their scores will be above the 3.5 cut line.

**Objective 2 March Update:** We have not been successful in recruiting the needed number of mentees for the second year of the program (6-8 mentees). We are not anticipating sponsoring the program for the second year of the biennium.

No expenses have been encumbered since the December meeting. Before the June meeting, the final costs will include paying for the EIPA exam for four interpreters, stipends for the four interpreters, and stipends for the mentees. At this point, we don't anticipate using all the remaining funds.

**Objective 2 June Update:** During the March meeting, MSDB administration was asked two questions that needed to be followed up with other individuals.

1. **With MSDB not having any educational interpreters signed up for year 2, will this possibly hurt the relationship with RIT in the future?**

RIT stated they are excited to work with MSDB in the future on any project. MSDB administration and members of RIT staff met to brainstorm ways to serve MSDB now and in the future. They proposed that for year 2, we have our three (3) educational interpreters that completed year one continue with RIT under a certificate program. You will see that under year 2 later in this report.

## 2. How many educational interpreters outside of MSDB met the definition of highly qualified in order to receive the quality educator payment for 2026-2027?

OPI confirmed that there were zero (0) educational interpreters other than MSDB interpreters that met the definition. MSDB has seven (7) out of the eight (8) interpreters that currently meet the definition.

General Update for June: For those interpreters (3) that participated completely in all required activities, we believe that we will see growth in their EIPA scores. All of them took the test on May 2, 2026 and will receive their scores in about six-months. We had two take the American Sign Language Proficiency Interview.

### Objective 2 Actual Total Costs (As of 6/5/26)

|                                    |                                 |
|------------------------------------|---------------------------------|
| Travel Costs - Mentors and Mentees | \$242                           |
| Technology                         | \$10,868                        |
| EIPA Exams                         | \$1,095                         |
| ASLPI Exam                         | \$370                           |
| Stipends for Participants          | \$4,500                         |
| <b>Total</b>                       | <b>\$17,075</b>                 |
| <b>% Spent</b>                     | <b>26% of Anticipated Costs</b> |

**Objective 2 for Year 1 Total Cost: \$17,075**

---

**Total Year 1 Cost (Objective 1 + Objective 2) = \$19,425**  
**31% of Allocation Spent**

---

### Glimpse into Year 2 of Program

**Objective 1:** The three (3) educational interpreters that completed Year 1 activities will continue with obtaining a Certificate in Educational Interpreting program from RIT. This program supports the professional development of interpreters working in K12 and postsecondary educational settings. The program enhances interpreting and performance analysis skills and expands participants' knowledge regarding the educational system, academic discourse, instructional strategies, and more by focusing on collaborative learning.

**Objective 1 Year 2 Anticipated Costs**

|                           |                 |
|---------------------------|-----------------|
| EIPA Pre and Post Tests   | \$1,500         |
| Program Cost              | \$4,800         |
| Stipends for Interpreters | \$7,500         |
| <u>Total</u>              | <u>\$13,800</u> |

# Montana School for the Deaf and Blind Foundation, Inc

## Budget vs. Actuals: Budget\_FY26\_P&L - FY26 P&L

July 2025 - June 2026

|                                                               | TOTAL               |                     |                     |                 |
|---------------------------------------------------------------|---------------------|---------------------|---------------------|-----------------|
|                                                               | ACTUAL              | BUDGET              | OVER BUDGET         | % OF BUDGET     |
| Revenue                                                       |                     |                     |                     |                 |
| 40000 Contributions                                           |                     | 0.00                | 0.00                |                 |
| 41100 Contributions Temporarily Restricted                    | 221,317.76          | 15,500.00           | 205,817.76          | 1,427.86 %      |
| 41400 Individual Contributions                                | 69,483.39           | 60,000.00           | 9,483.39            | 115.81 %        |
| 41410 Business Contributions                                  | 2,582.27            | 26,000.00           | -23,417.73          | 9.93 %          |
| 41415 Memorial & Trust Contributions                          | 34,040.00           | 31,000.00           | 3,040.00            | 109.81 %        |
| <b>Total 40000 Contributions</b>                              | <b>327,423.42</b>   | <b>132,500.00</b>   | <b>194,923.42</b>   | <b>247.11 %</b> |
| 41600 Fundraising Event Income                                |                     | 15,000.00           | -15,000.00          |                 |
| 41700 Investment Income                                       |                     |                     |                     |                 |
| 41710 Investment Interest                                     | 3.31                | 405.00              | -401.69             | 0.82 %          |
| 41720 Investment Dividends                                    | 100,372.12          | 80,000.00           | 20,372.12           | 125.47 %        |
| 41740 Investment Unrealized Gain (Loss)                       | 413,955.46          |                     | 413,955.46          |                 |
| 41750 Investment Management Fee                               | -24,707.84          | -15,000.00          | -9,707.84           | 164.72 %        |
| <b>Total 41700 Investment Income</b>                          | <b>489,623.05</b>   | <b>65,405.00</b>    | <b>424,218.05</b>   | <b>748.60 %</b> |
| <b>Total Revenue</b>                                          | <b>\$817,046.47</b> | <b>\$212,905.00</b> | <b>\$604,141.47</b> | <b>383.76 %</b> |
| <b>GROSS PROFIT</b>                                           | <b>\$817,046.47</b> | <b>\$212,905.00</b> | <b>\$604,141.47</b> | <b>383.76 %</b> |
| Expenditures                                                  |                     |                     |                     |                 |
| 51000 Office/General Administrative Expenditures              | 0.00                |                     | 0.00                |                 |
| 51100 Office/General Administrative Expenditures              | 245.35              | 1,200.00            | -954.65             | 20.45 %         |
| 51200 Office Equipment & Supplies                             | 560.62              | 2,500.00            | -1,939.38           | 22.42 %         |
| 51300 Bank Charges                                            | 1.66                |                     | 1.66                |                 |
| 51500 Postage                                                 | 276.39              |                     | 276.39              |                 |
| 51600 Quickbooks                                              | 3,300.00            | 2,820.00            | 480.00              | 117.02 %        |
| 51700 Foundation Staff Development                            |                     | 0.00                | 0.00                |                 |
| 51800 Foundation Travel & Meeting Expense                     | 405.04              | 4,000.00            | -3,594.96           | 10.13 %         |
| 51910 Insurance                                               | 803.00              | 805.00              | -2.00               | 99.75 %         |
| <b>Total 51000 Office/General Administrative Expenditures</b> | <b>5,592.06</b>     | <b>11,325.00</b>    | <b>-5,732.94</b>    | <b>49.38 %</b>  |
| 52000 Salaries & Wages                                        |                     |                     |                     |                 |
| 52100 Salaries & Wages                                        | 12,697.30           | 25,376.00           | -12,678.70          | 50.04 %         |
| 52400 Payroll / Taxes Fed / FICA                              | 3,141.18            | 4,300.00            | -1,158.82           | 73.05 %         |
| 52500 SUTA Expense                                            |                     | 950.00              | -950.00             |                 |
| 52600 Workman's Comp.                                         | 429.26              |                     | 429.26              |                 |
| 53200 ADP Fee                                                 | 1,125.67            | 1,060.00            | 65.67               | 106.20 %        |
| <b>Total 52000 Salaries &amp; Wages</b>                       | <b>17,393.41</b>    | <b>31,686.00</b>    | <b>-14,292.59</b>   | <b>54.89 %</b>  |
| 53000 Legal & Professional Services                           |                     | 0.00                | 0.00                |                 |
| 53100 Accounting Fees                                         | 1,750.00            | 5,300.00            | -3,550.00           | 33.02 %         |
| 53300 Audit Fee                                               | 24,000.00           | 25,500.00           | -1,500.00           | 94.12 %         |
| <b>Total 53000 Legal &amp; Professional Services</b>          | <b>25,750.00</b>    | <b>30,800.00</b>    | <b>-5,050.00</b>    | <b>83.60 %</b>  |
| 56000 Fundraising & Development                               |                     | 0.00                | 0.00                |                 |
| 56100 Express Magazine                                        | 15,909.49           | 24,000.00           | -8,090.51           | 66.29 %         |
| 56200 Fundraising Expense                                     | 683.40              | 8,000.00            | -7,316.60           | 8.54 %          |
| 56400 Public Relations & Development                          | 5,761.83            | 2,500.00            | 3,261.83            | 230.47 %        |

# Montana School for the Deaf and Blind Foundation, Inc

## Budget vs. Actuals: Budget\_FY26\_P&L - FY26 P&L

July 2025 - June 2026

|                                                  | TOTAL             |                  |                   |                 |
|--------------------------------------------------|-------------------|------------------|-------------------|-----------------|
|                                                  | ACTUAL            | BUDGET           | OVER BUDGET       | % OF BUDGET     |
| 56410 Bloomerang Subscription                    | 4,308.54          | 4,327.00         | -18.46            | 99.57 %         |
| 56420 HG Consulting Contract                     | 30,000.00         | 30,000.00        | 0.00              | 100.00 %        |
| <b>Total 56000 Fundraising &amp; Development</b> | <b>56,663.26</b>  | <b>68,827.00</b> | <b>-12,163.74</b> | <b>82.33 %</b>  |
| 57000 MSDB Direct Support                        |                   | 0.00             | 0.00              |                 |
| 57100 Accreditation                              | 9,107.51          | 8,000.00         | 1,107.51          | 113.84 %        |
| 57200 Cottage Support                            | 4,393.06          | 4,000.00         | 393.06            | 109.83 %        |
| 57250 Cottager Remodel                           |                   | 4,000.00         | -4,000.00         |                 |
| 57280 Special Equipment & Grant Expenditures     | 52,841.99         | 15,000.00        | 37,841.99         | 352.28 %        |
| 57300 Hearing Molds & Evaluations                | 3,166.52          | 5,000.00         | -1,833.48         | 63.33 %         |
| 57350 Northwest Association of Blind Athletes    | 11,500.00         | 11,500.00        | 0.00              | 100.00 %        |
| 57399 Professional Development Funding Contract  | 2,243.10          | 5,000.00         | -2,756.90         | 44.86 %         |
| 57400 Staff Professional Development             | 7,213.34          | 20,000.00        | -12,786.66        | 36.07 %         |
| 57500 Staff Awards                               | 5,053.51          | 7,000.00         | -1,946.49         | 72.19 %         |
| 57550 Student Support                            | 4,140.96          | 4,500.00         | -359.04           | 92.02 %         |
| 57650 Yearbook                                   | 131.01            | 700.00           | -568.99           | 18.72 %         |
| 57700 Technology & Equipment                     | 6,214.13          | 5,000.00         | 1,214.13          | 124.28 %        |
| <b>Total 57000 MSDB Direct Support</b>           | <b>106,005.13</b> | <b>89,700.00</b> | <b>16,305.13</b>  | <b>118.18 %</b> |
| 58000 Student Activities                         |                   |                  |                   |                 |
| 58020 Academic Bowl                              | 7,483.49          | 9,000.00         | -1,516.51         | 83.15 %         |
| 58030 Arbor Day                                  | 1,472.17          | 500.00           | 972.17            | 294.43 %        |
| 58050 Student Awards                             | 2,352.50          | 2,000.00         | 352.50            | 117.63 %        |
| 58051 Braille Challenge                          | 170.00            | 300.00           | -130.00           | 56.67 %         |
| 58070 Christmas                                  | 230.21            | 500.00           | -269.79           | 46.04 %         |
| 58080 Easter                                     |                   | 300.00           | -300.00           |                 |
| 58090 Expressions of Silence                     |                   | 1,500.00         | -1,500.00         |                 |
| 58091 Fall Celebration                           | 2,051.80          | 2,000.00         | 51.80             | 102.59 %        |
| 58092 Spring Celebration                         | 2,509.42          | 3,500.00         | -990.58           | 71.70 %         |
| 58100 Family Learning Weekend - Blind            | 1,710.19          | 8,000.00         | -6,289.81         | 21.38 %         |
| 58110 Family Learning Weekend - Deaf             | 2,335.16          | 8,000.00         | -5,664.84         | 29.19 %         |
| 58120 Flying Hooves Club                         | 160.02            | 1,000.00         | -839.98           | 16.00 %         |
| 58140 Goalball                                   | 192.19            | 2,500.00         | -2,307.81         | 7.69 %          |
| 58150 Graduation                                 | 429.68            | 750.00           | -320.32           | 57.29 %         |
| 58160 Halloween                                  |                   | 250.00           | -250.00           |                 |
| 58180 Prom                                       | 294.54            | 300.00           | -5.46             | 98.18 %         |
| 58190 Moving Mustangs / Red Ribbon PTHA          |                   | 200.00           | -200.00           |                 |
| 58195 Student Scholarships                       | -2,000.00         |                  | -2,000.00         |                 |
| 58200 Senior Trip                                | 2,527.55          | 6,000.00         | -3,472.45         | 42.13 %         |
| 58210 Ski Trip                                   | 4,212.22          | 4,500.00         | -287.78           | 93.60 %         |
| 58211 Student Ambassador Program                 |                   | 200.00           | -200.00           |                 |
| 58220 Summer Camp - Blind                        | 557.05            | 4,000.00         | -3,442.95         | 13.93 %         |
| 58230 Summer Camp - Deaf                         | 726.75            | 4,000.00         | -3,273.25         | 18.17 %         |
| 58240 Visually Impaired Performers (VIP)         |                   | 250.00           | -250.00           |                 |
| <b>Total 58000 Student Activities</b>            | <b>27,414.94</b>  | <b>59,550.00</b> | <b>-32,135.06</b> | <b>46.04 %</b>  |

# Montana School for the Deaf and Blind Foundation, Inc

## Budget vs. Actuals: Budget\_FY26\_P&L - FY26 P&L

July 2025 - June 2026

|                            | TOTAL               |                     |                     |                  |
|----------------------------|---------------------|---------------------|---------------------|------------------|
|                            | ACTUAL              | BUDGET              | OVER BUDGET         | % OF BUDGET      |
| <b>Total Expenditures</b>  | <b>\$238,818.89</b> | <b>\$291,888.00</b> | <b>\$-53,069.20</b> | <b>81.82 %</b>   |
| NET OPERATING REVENUE      | <b>\$578,227.67</b> | <b>\$-78,983.00</b> | <b>\$657,210.67</b> | <b>-732.09 %</b> |
| Other Revenue              |                     |                     |                     |                  |
| 70110 Dividend Revenue     | 100.00              |                     | 100.00              |                  |
| 71020 Interest Earned      | 1,660.98            | 250.00              | 1,410.98            | 664.39 %         |
| <b>Total Other Revenue</b> | <b>\$1,760.98</b>   | <b>\$250.00</b>     | <b>\$1,510.98</b>   | <b>704.39 %</b>  |
| NET OTHER REVENUE          | <b>\$1,760.98</b>   | <b>\$250.00</b>     | <b>\$1,510.98</b>   | <b>704.39 %</b>  |
| NET REVENUE                | <b>\$579,988.65</b> | <b>\$-78,733.00</b> | <b>\$658,721.65</b> | <b>-736.65 %</b> |



## 51130 School for the Deaf & Blind ORG Budget Summary - No A Accruals

Data Selected for Month/FY: 01 (Jul)/2026 through 12 (Jun)/2026

This report compares ORG Budgets (ORG\_BD) to Actuals expended amounts

|               |       |
|---------------|-------|
| Business Unit | (All) |
| Program Year  | 2026  |
| FY_BudPer     | (All) |
| Month         | (All) |
| Source of Au  | (All) |
| Fund Type     | (All) |
| Account       | (All) |
| Org           | (All) |
| Acct Lvl 2    | (All) |
| Account Type  | E     |
| Project       | (All) |
| Ledger        | (All) |

[Menu!A1](#)

[Menu!A1](#)

| OBPP Progra Fund                          | Subclass | Acct Lvl 1 | ORG Budget        | Actuals Amt       | Balance          |
|-------------------------------------------|----------|------------|-------------------|-------------------|------------------|
| <b>01 ADMINISTRATION PROGRAM</b>          |          |            | <b>897,187.25</b> | <b>885,426.10</b> | <b>11,761.15</b> |
| <b>01100 General Fund</b>                 |          |            | <b>879,435.00</b> | <b>867,673.85</b> | <b>11,761.15</b> |
| <b>300H1 ADMINISTRATION</b>               |          |            | <b>621,838.00</b> | <b>617,752.17</b> | <b>4,085.83</b>  |
| 61000 Personal Services                   |          |            | 589,857.00        | 591,967.41        | (2,110.41)       |
| 62000 Operating Expenses                  |          |            | 31,981.00         | 25,784.76         | 6,196.24         |
| <b>300H5 STATE ITSD (RST)</b>             |          |            | <b>257,597.00</b> | <b>249,921.68</b> | <b>7,675.32</b>  |
| 62000 Operating Expenses                  |          |            | 257,597.00        | 249,921.68        | 7,675.32         |
| <b>02050 School Trust Interest/Income</b> |          |            | <b>3,394.00</b>   | <b>3,394.00</b>   | <b>0.00</b>      |
| <b>300H1 ADMINISTRATION</b>               |          |            | <b>3,394.00</b>   | <b>3,394.00</b>   | <b>0.00</b>      |
| 61000 Personal Services                   |          |            | 3,394.00          | 3,394.00          | 0.00             |
| <b>02259 MSDB MISC MOUS</b>               |          |            | <b>14,358.25</b>  | <b>14,358.25</b>  | <b>0.00</b>      |
| <b>300A1 DIGITAL ACADEMY</b>              |          |            | <b>14,358.25</b>  | <b>14,358.25</b>  | <b>0.00</b>      |
| 61000 Personal Services                   |          |            | 13,895.08         | 13,895.08         | 0.00             |
| 62000 Operating Expenses                  |          |            | 463.17            | 463.17            | 0.00             |



|                                           |                                  |                     |                    |                    |
|-------------------------------------------|----------------------------------|---------------------|--------------------|--------------------|
| <b>02 GENERAL SERVICES</b>                |                                  | <b>822,434.91</b>   | <b>698,872.10</b>  | <b>123,562.81</b>  |
| <b>01100 General Fund</b>                 |                                  | <b>822,434.91</b>   | <b>698,872.10</b>  | <b>123,562.81</b>  |
| <b>305F4 FY2024 CARRYFORWARD</b>          |                                  | <b>1,060.91</b>     | <b>1,039.76</b>    | <b>21.15</b>       |
|                                           | 62000 Operating Expenses         | 10.41               | 1,039.76           | (1,029.35)         |
|                                           | 63000 Equipment & Intangible Ass | 1,050.50            | 0.00               | 1,050.50           |
| <b>305H1 GENERAL SERVICES</b>             |                                  | <b>821,374.00</b>   | <b>697,832.34</b>  | <b>123,541.66</b>  |
|                                           | 61000 Personal Services          | 392,182.00          | 353,371.31         | 38,810.69          |
|                                           | 62000 Operating Expenses         | 366,577.00          | 344,461.03         | 22,115.97          |
|                                           | 68000 Transfers-out              | 1,000.00            | 0.00               | 1,000.00           |
|                                           | 69000 Debt Service               | 61,615.00           | 0.00               | 61,615.00          |
| <b>03 STUDENT SERVICES</b>                |                                  | <b>2,290,049.00</b> | <b>2,047,643.8</b> | <b>242,405.16</b>  |
| <b>01100 General Fund</b>                 |                                  | <b>2,255,320.00</b> | <b>2,022,521.7</b> | <b>232,798.30</b>  |
| <b>310H1 STUDENT SERVICES</b>             |                                  | <b>2,255,320.00</b> | <b>2,022,521.7</b> | <b>232,798.30</b>  |
|                                           | 61000 Personal Services          | 2,053,236.00        | 1,875,302.0        | 177,933.96         |
|                                           | 62000 Operating Expenses         | 202,084.00          | 147,219.66         | 54,864.34          |
| <b>03167 National School Lunch</b>        |                                  | <b>34,729.00</b>    | <b>25,122.14</b>   | <b>9,606.86</b>    |
| <b>310H1 STUDENT SERVICES</b>             |                                  | <b>34,729.00</b>    | <b>25,122.14</b>   | <b>9,606.86</b>    |
|                                           | 62000 Operating Expenses         | 34,729.00           | 25,122.14          | 9,606.86           |
| <b>04 EDUCATION</b>                       |                                  | <b>7,397,661.00</b> | <b>6,358,370.9</b> | <b>1,039,290.0</b> |
| <b>01100 General Fund</b>                 |                                  | <b>6,448,740.00</b> | <b>5,871,583.8</b> | <b>577,156.12</b>  |
| <b>315H1 EDUCATION</b>                    |                                  | <b>6,385,607.00</b> | <b>5,854,142.9</b> | <b>531,464.07</b>  |
|                                           | 61000 Personal Services          | 5,969,317.00        | 5,533,125.4        | 436,191.52         |
|                                           | 62000 Operating Expenses         | 416,290.00          | 321,017.45         | 95,272.55          |
| <b>315H8 INTERPRETER PROF DEV (OTO)</b>   |                                  | <b>61,000.00</b>    | <b>17,440.95</b>   | <b>43,559.05</b>   |
|                                           | 62000 Operating Expenses         | 61,000.00           | 17,440.95          | 43,559.05          |
| <b>315Z1 WORKERS COMP. REDUCTION</b>      |                                  | <b>2,133.00</b>     | <b>0.00</b>        | <b>2,133.00</b>    |
|                                           | 61000 Personal Services          | 2,133.00            | 0.00               | 2,133.00           |
| <b>02050 School Trust Interest/Income</b> |                                  | <b>302,341.00</b>   | <b>256,957.04</b>  | <b>45,383.96</b>   |
| <b>315H1 EDUCATION</b>                    |                                  | <b>302,341.00</b>   | <b>256,957.04</b>  | <b>45,383.96</b>   |
|                                           | 61000 Personal Services          | 302,341.00          | 256,957.04         | 45,383.96          |
| <b>03012 E.C.I.A. Chapter I</b>           |                                  | <b>52,861.00</b>    | <b>50,466.01</b>   | <b>2,394.99</b>    |

|                                            |                          |                      |                    |                    |
|--------------------------------------------|--------------------------|----------------------|--------------------|--------------------|
| <b>315H1 EDUCATION</b>                     |                          | <b>52,861.00</b>     | <b>50,466.01</b>   | <b>2,394.99</b>    |
|                                            | 61000 Personal Services  | 52,861.00            | 50,466.01          | 2,394.99           |
| <b>03064 EHA, Part B</b>                   |                          | <b>119,219.00</b>    | <b>72,279.68</b>   | <b>46,939.32</b>   |
| <b>315H1 EDUCATION</b>                     |                          | <b>119,202.00</b>    | <b>72,279.68</b>   | <b>46,922.32</b>   |
|                                            | 61000 Personal Services  | 55,000.00            | 55,000.00          | 0.00               |
|                                            | 62000 Operating Expenses | 64,202.00            | 17,279.68          | 46,922.32          |
| <b>315Z1 WORKERS COMP. REDUCTION</b>       |                          | <b>17.00</b>         | <b>0.00</b>        | <b>17.00</b>       |
|                                            | 61000 Personal Services  | 17.00                | 0.00               | 17.00              |
| <b>03235 DPHHS Grant</b>                   |                          | <b>28,500.00</b>     | <b>9,923.42</b>    | <b>18,576.58</b>   |
| <b>315AS PRE-ETS</b>                       |                          | <b>28,500.00</b>     | <b>9,923.42</b>    | <b>18,576.58</b>   |
|                                            | 62000 Operating Expenses | 28,500.00            | 9,923.42           | 18,576.58          |
| <b>03396 DPHHS Grand - Newborn Hearing</b> |                          | <b>35,000.00</b>     | <b>16,326.47</b>   | <b>18,673.53</b>   |
| <b>315AT NEWBORN HEARING</b>               |                          | <b>35,000.00</b>     | <b>16,326.47</b>   | <b>18,673.53</b>   |
|                                            | 61000 Personal Services  | 22,000.00            | 6,630.00           | 15,370.00          |
|                                            | 62000 Operating Expenses | 13,000.00            | 9,696.47           | 3,303.53           |
| <b>03590 Federal Literacy Grant</b>        |                          | <b>411,000.00</b>    | <b>80,834.47</b>   | <b>330,165.53</b>  |
| <b>315AU MT READS GRANT 9/30/26</b>        |                          | <b>411,000.00</b>    | <b>80,834.47</b>   | <b>330,165.53</b>  |
|                                            | 61000 Personal Services  | 2,720.00             | 0.00               | 2,720.00           |
|                                            | 62000 Operating Expenses | 408,280.00           | 80,834.47          | 327,445.53         |
| <b>Grand Total</b>                         |                          | <b>11,407,332.16</b> | <b>9,990,313.0</b> | <b>1,417,019.1</b> |



## 51130 School for the Deaf & Blind ORG Budget Summary - No A Accruals

Data Selected for Month/FY: 01 (Jul)/2026 through 12 (Jun)/2026

This report compares ORG Budgets (ORG\_BD) to Actuals expended amounts

|               |       |
|---------------|-------|
| Business Unit | (All) |
| Program Year  | 2026  |
| FY_BudPer     | (All) |
| Month         | (All) |
| Source of Au  | (All) |
| Fund Type     | (All) |
| Account       | (All) |
| Org           | (All) |
| Acct Lvl 2    | (All) |
| Account Type  | E     |
| Project       | (All) |
| Ledger        | (All) |

[Menu!A1](#)

[Menu!A1](#)

| OBPP Progra Fund                 | Subclass | Acct Lvl 1              | ORG Budget        | Actuals Amt       | Balance          |
|----------------------------------|----------|-------------------------|-------------------|-------------------|------------------|
| <b>01 ADMINISTRATION PROGRAM</b> |          |                         | <b>290,041.17</b> | <b>276,169.61</b> | <b>13,871.56</b> |
| 01100 General Fund               |          |                         | 289,578.00        | 275,706.44        | 13,871.56        |
| 300H1 ADMINISTRATION             |          |                         | 31,981.00         | 25,784.76         | 6,196.24         |
|                                  |          | 62000 Operating Expense | 31,981.00         | 25,784.76         | 6,196.24         |
| 300H5 STATE ITSD (RST)           |          |                         | 257,597.00        | 249,921.68        | 7,675.32         |
|                                  |          | 62000 Operating Expense | 257,597.00        | 249,921.68        | 7,675.32         |
| 02259 MSDB MISC MOUS             |          |                         | 463.17            | 463.17            | 0.00             |
| 300A1 DIGITAL ACADEMY            |          |                         | 463.17            | 463.17            | 0.00             |
|                                  |          | 62000 Operating Expense | 463.17            | 463.17            | 0.00             |
| <b>02 GENERAL SERVICES</b>       |          |                         | <b>366,587.41</b> | <b>345,500.79</b> | <b>21,086.62</b> |
| 01100 General Fund               |          |                         | 366,587.41        | 345,500.79        | 21,086.62        |
| 305F4 FY2024 CARRYFORWARD        |          |                         | 10.41             | 1,039.76          | (1,029.35)       |
|                                  |          | 62000 Operating Expense | 10.41             | 1,039.76          | (1,029.35)       |

|                                            |                           |                     |                    |                  |
|--------------------------------------------|---------------------------|---------------------|--------------------|------------------|
| <u>305H1 GENERAL SERVICES</u>              |                           | 366,577.00          | 344,461.03         | 22,115.97        |
|                                            | : 62000 Operating Expense | 366,577.00          | 344,461.03         | 22,115.97        |
| <b>03 STUDENT SERVICES</b>                 |                           | <b>236,813.00</b>   | <b>172,341.80</b>  | <b>64,471.20</b> |
| <u>01100 General Fund</u>                  |                           | <u>202,084.00</u>   | <u>147,219.66</u>  | <u>54,864.34</u> |
| <u>310H1 STUDENT SERVICES</u>              |                           | <u>202,084.00</u>   | <u>147,219.66</u>  | <u>54,864.34</u> |
|                                            | : 62000 Operating Expense | 202,084.00          | 147,219.66         | 54,864.34        |
| <u>03167 National School Lunch</u>         |                           | <u>34,729.00</u>    | <u>25,122.14</u>   | <u>9,606.86</u>  |
| <u>310H1 STUDENT SERVICES</u>              |                           | <u>34,729.00</u>    | <u>25,122.14</u>   | <u>9,606.86</u>  |
|                                            | : 62000 Operating Expense | 34,729.00           | 25,122.14          | 9,606.86         |
| <b>04 EDUCATION</b>                        |                           | <b>991,272.00</b>   | <b>456,192.44</b>  | <b>535,079.5</b> |
| <u>01100 General Fund</u>                  |                           | <u>477,290.00</u>   | <u>338,458.40</u>  | <u>138,831.6</u> |
| <u>315H1 EDUCATION</u>                     |                           | <u>416,290.00</u>   | <u>321,017.45</u>  | <u>95,272.55</u> |
|                                            | : 62000 Operating Expense | 416,290.00          | 321,017.45         | 95,272.55        |
| <u>315H8 INTERPRETER PROF DEV (OTO)</u>    |                           | <u>61,000.00</u>    | <u>17,440.95</u>   | <u>43,559.05</u> |
|                                            | : 62000 Operating Expense | 61,000.00           | 17,440.95          | 43,559.05        |
| <u>03064 EHA, Part B</u>                   |                           | <u>64,202.00</u>    | <u>17,279.68</u>   | <u>46,922.32</u> |
| <u>315H1 EDUCATION</u>                     |                           | <u>64,202.00</u>    | <u>17,279.68</u>   | <u>46,922.32</u> |
|                                            | : 62000 Operating Expense | 64,202.00           | 17,279.68          | 46,922.32        |
| <u>03235 DPHHS Grant</u>                   |                           | <u>28,500.00</u>    | <u>9,923.42</u>    | <u>18,576.58</u> |
| <u>315AS PRE-ETS</u>                       |                           | <u>28,500.00</u>    | <u>9,923.42</u>    | <u>18,576.58</u> |
|                                            | : 62000 Operating Expense | 28,500.00           | 9,923.42           | 18,576.58        |
| <u>03396 DPHHS Grand - Newborn Hearing</u> |                           | <u>13,000.00</u>    | <u>9,696.47</u>    | <u>3,303.53</u>  |
| <u>315AT NEWBORN HEARING</u>               |                           | <u>13,000.00</u>    | <u>9,696.47</u>    | <u>3,303.53</u>  |
|                                            | : 62000 Operating Expense | 13,000.00           | 9,696.47           | 3,303.53         |
| <u>03590 Federal Literacy Grant</u>        |                           | <u>408,280.00</u>   | <u>80,834.47</u>   | <u>327,445.5</u> |
| <u>315AU MT READS GRANT 9/30/26</u>        |                           | <u>408,280.00</u>   | <u>80,834.47</u>   | <u>327,445.5</u> |
|                                            | : 62000 Operating Expense | 408,280.00          | 80,834.47          | 327,445.5        |
| <b>Grand Total</b>                         |                           | <b>1,884,713.58</b> | <b>1,250,204.6</b> | <b>634,508.9</b> |



## 51130 School for the Deaf & Blind ORG Budget Summary - No A Accruals

Data Selected for Month/FY: 01 (Jul)/2026 through 12 (Jun)/2026

This report compares ORG Budgets (ORG\_BD) to Actuals expended amounts

|               |       |
|---------------|-------|
| Business Unit | (All) |
| Program Year  | 2026  |
| FY_BudPer     | (All) |
| Month         | (All) |
| Source of Au  | (All) |
| Fund Type     | (All) |
| Account       | (All) |
| Org           | (All) |
| Acct Lvl 2    | (All) |
| Account Type  | E     |
| Project       | (All) |
| Ledger        | (All) |

[Menu!A1](#)

[Menu!A1](#)

| OBPP Progra Fund                   | Subclass                      | Acct Lvl 1             | ORG Budget        | Actuals Amt       | Balance           |
|------------------------------------|-------------------------------|------------------------|-------------------|-------------------|-------------------|
| <b>01 ADMINISTRATION PROGRAM</b>   |                               |                        | <b>607,146.08</b> | <b>609,256.49</b> | <b>(2,110.41)</b> |
| 01100 General Fund                 |                               |                        | 589,857.00        | 591,967.41        | (2,110.41)        |
|                                    | <b>300H1 ADMINISTRATION</b>   |                        | 589,857.00        | 591,967.41        | (2,110.41)        |
|                                    |                               | 61000 Personal Service | 589,857.00        | 591,967.41        | (2,110.41)        |
| 02050 School Trust Interest/Income |                               |                        | 3,394.00          | 3,394.00          | 0.00              |
|                                    | <b>300H1 ADMINISTRATION</b>   |                        | 3,394.00          | 3,394.00          | 0.00              |
|                                    |                               | 61000 Personal Service | 3,394.00          | 3,394.00          | 0.00              |
| 02259 MSDB MISC MOUS               |                               |                        | 13,895.08         | 13,895.08         | 0.00              |
|                                    | <b>300A1 DIGITAL ACADEMY</b>  |                        | 13,895.08         | 13,895.08         | 0.00              |
|                                    |                               | 61000 Personal Service | 13,895.08         | 13,895.08         | 0.00              |
| <b>02 GENERAL SERVICES</b>         |                               |                        | <b>392,182.00</b> | <b>353,371.31</b> | <b>38,810.69</b>  |
| 01100 General Fund                 |                               |                        | 392,182.00        | 353,371.31        | 38,810.69         |
|                                    | <b>305H1 GENERAL SERVICES</b> |                        | 392,182.00        | 353,371.31        | 38,810.69         |
|                                    |                               | 61000 Personal Service | 392,182.00        | 353,371.31        | 38,810.69         |

|                                            |                        |                     |                    |                  |
|--------------------------------------------|------------------------|---------------------|--------------------|------------------|
| <b>03 STUDENT SERVICES</b>                 |                        | <b>2,053,236.00</b> | <b>1,875,302.0</b> | <b>177,933.9</b> |
| <b>01100 General Fund</b>                  |                        | <b>2,053,236.00</b> | <b>1,875,302.0</b> | <b>177,933.9</b> |
| <b>310H1 STUDENT SERVICES</b>              |                        | <b>2,053,236.00</b> | <b>1,875,302.0</b> | <b>177,933.9</b> |
|                                            | 61000 Personal Service | 2,053,236.00        | 1,875,302.0        | 177,933.9        |
| <b>04 EDUCATION</b>                        |                        | <b>6,406,389.00</b> | <b>5,902,178.5</b> | <b>504,210.4</b> |
| <b>01100 General Fund</b>                  |                        | <b>5,971,450.00</b> | <b>5,533,125.4</b> | <b>438,324.5</b> |
| <b>315H1 EDUCATION</b>                     |                        | <b>5,969,317.00</b> | <b>5,533,125.4</b> | <b>436,191.5</b> |
|                                            | 61000 Personal Service | 5,969,317.00        | 5,533,125.4        | 436,191.5        |
| <b>315Z1 WORKERS COMP. REDUCTION</b>       |                        | <b>2,133.00</b>     | <b>0.00</b>        | <b>2,133.00</b>  |
|                                            | 61000 Personal Service | 2,133.00            | 0.00               | 2,133.00         |
| <b>02050 School Trust Interest/Income</b>  |                        | <b>302,341.00</b>   | <b>256,957.04</b>  | <b>45,383.96</b> |
| <b>315H1 EDUCATION</b>                     |                        | <b>302,341.00</b>   | <b>256,957.04</b>  | <b>45,383.96</b> |
|                                            | 61000 Personal Service | 302,341.00          | 256,957.04         | 45,383.96        |
| <b>03012 E.C.I.A. Chapter I</b>            |                        | <b>52,861.00</b>    | <b>50,466.01</b>   | <b>2,394.99</b>  |
| <b>315H1 EDUCATION</b>                     |                        | <b>52,861.00</b>    | <b>50,466.01</b>   | <b>2,394.99</b>  |
|                                            | 61000 Personal Service | 52,861.00           | 50,466.01          | 2,394.99         |
| <b>03064 EHA, Part B</b>                   |                        | <b>55,017.00</b>    | <b>55,000.00</b>   | <b>17.00</b>     |
| <b>315H1 EDUCATION</b>                     |                        | <b>55,000.00</b>    | <b>55,000.00</b>   | <b>0.00</b>      |
|                                            | 61000 Personal Service | 55,000.00           | 55,000.00          | 0.00             |
| <b>315Z1 WORKERS COMP. REDUCTION</b>       |                        | <b>17.00</b>        | <b>0.00</b>        | <b>17.00</b>     |
|                                            | 61000 Personal Service | 17.00               | 0.00               | 17.00            |
| <b>03396 DPHHS Grand - Newborn Hearing</b> |                        | <b>22,000.00</b>    | <b>6,630.00</b>    | <b>15,370.00</b> |
| <b>315AT NEWBORN HEARING</b>               |                        | <b>22,000.00</b>    | <b>6,630.00</b>    | <b>15,370.00</b> |
|                                            | 61000 Personal Service | 22,000.00           | 6,630.00           | 15,370.00        |
| <b>03590 Federal Literacy Grant</b>        |                        | <b>2,720.00</b>     | <b>0.00</b>        | <b>2,720.00</b>  |
| <b>315AU MT READS GRANT 9/30/26</b>        |                        | <b>2,720.00</b>     | <b>0.00</b>        | <b>2,720.00</b>  |
|                                            | 61000 Personal Service | 2,720.00            | 0.00               | 2,720.00         |
| <b>Grand Total</b>                         |                        | <b>9,458,953.08</b> | <b>8,740,108.3</b> | <b>718,844.7</b> |



**PAYROLL TOTALS**

| PAYROLL TOTALS      |            | General Fund   | School Trust   | MSOB misc MOU's | General Fund   | General Fund     | General Fund                         | WORKERS COMP   | School Trust   | IDEA Pre-school & Part B | IDEA Outreach  | WORKERS COMP | Newborn Hearing     | MT Reads Grant |            |                                |  |
|---------------------|------------|----------------|----------------|-----------------|----------------|------------------|--------------------------------------|----------------|----------------|--------------------------|----------------|--------------|---------------------|----------------|------------|--------------------------------|--|
|                     |            | PGM 1<br>01100 | PGM 1<br>02050 | PGM 1<br>02259  | PGM 2<br>01100 | PGM 3<br>01100   | PGM 4<br>01100                       | PGM 4<br>01100 | PGM 4<br>02050 | PGM 4<br>03012           | PGM 4<br>03064 | PGM 4        | PGM 4<br>1100 03396 | PGM 4<br>03590 |            |                                |  |
| Budget              |            | \$589,857.00   | \$3,394.00     | \$13,895.08     | \$392,182.00   | \$2,053,236.00   | \$5,969,317.00                       | \$2,133.00     | \$302,341.00   | \$52,861.00              | \$55,000.00    |              | \$17.00             | \$22,000.00    | \$2,720.00 | \$9,458,953.08                 |  |
| PPE:                | 6/27/2025  | (\$2,635.00)   |                |                 | (\$2,635.00)   | (\$14,231.82)    | (\$30,563.18)                        |                |                |                          |                |              |                     |                |            | (\$50,065.00)                  |  |
| 1                   | 7/11/2025  | (\$20,205.98)  |                |                 | (\$13,172.42)  | (\$55,389.98)    | (\$181,366.78)                       |                |                |                          |                |              |                     |                |            | (\$270,135.16)                 |  |
| 2                   | 7/25/2025  | (\$23,497.47)  |                |                 | (\$14,903.77)  | (\$55,959.52)    | (\$207,299.12)                       |                |                |                          |                |              |                     |                |            | (\$301,659.88)                 |  |
| 3                   | 8/8/2025   | (\$23,458.35)  |                |                 | (\$14,252.82)  | (\$57,458.76)    | (\$228,646.23)                       |                |                |                          |                |              |                     |                |            | (\$233,816.16)                 |  |
| 4                   | 8/22/2025  | (\$20,738.78)  |                |                 | (\$14,309.61)  | (\$64,336.61)    | (\$345,710.37)                       |                |                |                          |                |              |                     |                |            | (\$445,095.37)                 |  |
| 5                   | 9/5/2025   | (\$24,085.66)  |                |                 | (\$15,452.61)  | (\$83,595.58)    | (\$248,327.44)                       |                |                |                          |                |              |                     |                |            | (\$371,461.29)                 |  |
| 6                   | 9/19/2025  | (\$23,427.26)  |                |                 | (\$14,741.47)  | (\$76,804.09)    | (\$239,199.09)                       |                |                |                          |                |              |                     |                |            | (\$353,671.93)                 |  |
| 7                   | 10/3/2025  | (\$23,425.31)  |                |                 | (\$14,269.86)  | (\$81,207.78)    | (\$236,975.32)                       |                |                |                          |                |              |                     |                |            | (\$355,878.27)                 |  |
| 8                   | 10/17/2025 | (\$20,318.09)  |                |                 | (\$11,655.17)  | (\$64,412.75)    | (\$203,564.86)                       |                |                |                          |                |              |                     |                |            | (\$299,950.87)                 |  |
| 9                   | 10/31/2025 | (\$26,877.40)  |                |                 | (\$14,264.16)  | (\$80,066.58)    | (\$238,793.06)                       |                |                |                          |                |              |                     |                |            | (\$360,001.20)                 |  |
| 10                  | 11/14/2025 | (\$25,837.34)  |                |                 | (\$14,741.47)  | (\$83,894.36)    | (\$232,359.75)                       |                |                |                          |                |              |                     |                |            | (\$356,332.92)                 |  |
| 11                  | 11/28/2025 | (\$23,425.35)  |                |                 | (\$14,326.65)  | (\$76,681.05)    | (\$231,626.23)                       |                |                |                          |                |              |                     |                |            | (\$346,059.28)                 |  |
| 12                  | 12/12/2025 | (\$23,209.23)  |                |                 | (\$18,850.02)  | (\$81,156.02)    | (\$237,165.85)                       |                |                |                          |                |              |                     |                |            | (\$360,381.12)                 |  |
| 13                  | 12/26/2025 | (\$23,505.49)  | (\$3,394.00)   |                 | (\$14,325.63)  | (\$75,639.95)    | (\$163,034.07)                       |                | (\$58,061.02)  |                          |                |              |                     | (\$6,630.00)   |            | (\$344,590.16)                 |  |
| 14                  | 1/9/2026   | (\$23,505.47)  |                |                 | (\$13,252.15)  | (\$70,869.30)    | (\$231,604.25)                       |                |                |                          |                |              |                     |                |            | (\$339,231.17)                 |  |
| 15                  | 1/23/2026  | (\$25,972.62)  |                |                 | (\$13,795.88)  | (\$81,441.78)    | (\$237,879.03)                       |                |                |                          |                |              |                     |                |            | (\$359,089.31)                 |  |
| 16                  | 2/6/2026   | (\$22,188.23)  |                |                 | (\$13,851.14)  | (\$82,943.01)    | (\$163,920.05)                       |                | (\$68,467.47)  |                          |                |              |                     |                |            | (\$351,369.90)                 |  |
| 17                  | 2/20/2026  | (\$24,714.53)  |                |                 | (\$13,822.74)  | (\$78,288.87)    | (\$182,982.38)                       |                |                | (\$50,466.01)            |                |              |                     |                |            | (\$350,274.53)                 |  |
| 18                  | 3/6/2026   | (\$24,215.75)  |                |                 | (\$13,828.42)  | (\$82,310.56)    | (\$228,532.39)                       |                |                |                          |                |              |                     |                |            | (\$348,887.12)                 |  |
| 19                  | 3/20/2026  | (\$25,409.30)  |                | (\$6,120.44)    | (\$13,783.03)  | (\$78,861.25)    | (\$230,504.24)                       |                |                |                          |                |              |                     |                |            | (\$354,678.26)                 |  |
| 20                  | 4/3/2026   | (\$21,654.13)  |                |                 | (\$13,817.06)  | (\$76,366.90)    | (\$238,112.07)                       |                |                |                          |                |              |                     |                |            | (\$349,950.16)                 |  |
| 21                  | 4/17/2026  | (\$20,398.72)  |                |                 | (\$11,125.70)  | (\$60,773.76)    | (\$206,270.17)                       |                |                |                          |                |              |                     |                |            | (\$298,028.36)                 |  |
| 22                  | 5/1/2026   | (\$27,508.01)  |                |                 | (\$13,788.71)  | (\$80,448.81)    | (\$262,856.88)                       |                |                |                          |                |              |                     |                |            | (\$384,602.41)                 |  |
| 23                  | 5/16/2026  | (\$25,149.97)  |                |                 | (\$13,805.92)  | (\$77,202.97)    | (\$236,548.29)                       |                |                |                          |                |              |                     |                |            | (\$352,707.15)                 |  |
| 24                  | 5/29/2026  | (\$28,271.58)  |                |                 | (\$13,805.74)  | (\$80,815.72)    | (\$106,563.80)                       |                | (\$130,428.55) |                          |                |              |                     |                |            | (\$359,885.39)                 |  |
| 25                  | 6/12/2026  | (\$26,693.18)  |                |                 | (\$13,805.70)  | (\$74,144.28)    | (\$182,773.90)                       |                |                |                          | (\$55,000.00)  |              |                     |                |            | (\$352,417.04)                 |  |
| 26                  | 6/26/2026  |                |                |                 |                |                  |                                      |                |                |                          |                |              |                     |                |            | \$0.00                         |  |
| TOTAL PAYROLL:      |            | (\$600,328.20) | (\$3,394.00)   | (\$6,120.44)    | (\$353,382.85) | (\$1,875,302.04) | (\$5,533,178.80)                     | \$0.00         | (\$256,957.04) | (\$50,466.01)            | (\$55,000.00)  |              | \$0.00              | (\$6,630.00)   | \$0.00     | (\$8,740,219.39)               |  |
| BALANCE             |            | (\$10,471.20)  | \$0.00         | \$7,774.64      | \$38,799.15    | \$177,933.96     | \$436,138.20                         | \$2,133.00     | \$45,383.96    | \$2,394.99               | \$0.00         | \$0.00       | \$17.00             | \$15,370.00    | \$2,720.00 | \$718,733.69 * TIES TO GL      |  |
| 25 AVERAGE PAYROLL  |            | (\$24,013.13)  | (\$1335.76)    | (\$244.82)      | (\$14,135.31)  | (\$75,012.08)    | (\$221,327.15)                       | \$0.00         | \$0.00         | \$0.00                   | \$0.00         | \$0.00       | \$0.00              | \$0.00         | \$0.00     | (\$349,608.78) Average payroll |  |
| 1 ESTIMATED PAYROLL |            | (\$24,013.13)  | (\$1335.76)    | (\$244.82)      | (\$14,135.31)  | (\$75,012.08)    | (\$221,327.15)                       | \$0.00         | \$0.00         | \$0.00                   | \$0.00         | \$0.00       | \$0.00              | \$0.00         | \$0.00     | (\$349,608.78)                 |  |
| Retirement payouts: |            | \$0.00         | \$0.00         | \$0.00          | (\$38,428.00)  | \$0.00           | (\$1,440.00)                         | \$0.00         | \$0.00         | \$0.00                   | \$0.00         | \$0.00       | \$0.00              | \$0.00         | \$0.00     | (\$39,868.00)                  |  |
| PROJECTED FYE BAL:  |            | (\$34,484.33)  | (\$135.76)     | \$7,529.82      | \$24,663.84    | \$102,921.88     | \$214,811.05                         | \$2,133.00     | \$45,383.96    | \$2,394.99               | \$0.00         | \$0.00       | \$17.00             | \$15,370.00    | \$2,720.00 | \$329,256.91 Total with Grants |  |
| FOUR PROGRAM TOTAL  |            |                |                |                 |                | \$307,912.43     | Estimated balance left in 4 programs |                |                |                          |                |              |                     |                |            |                                |  |





# THE MSDB STUDENT LIFE NEWSLETTER



MAY 2025

VOLUME 5, NO. 5

A huge thank you to Angelina and cottage staff for providing all the stunning visuals for this edition!



## UPDATE FROM THE DIRECTOR OF STUDENT LIFE

This is the last travel weekend prior to the last day of school – June 4th . We had our annual Spring Program “The Wonderful World of Disney,” and all of the MSDB students participated in this program. Next was the Expressions of Silence Spring Fundraiser “Forever Country,” and this was fun and well attended. This past weekend the Flying Hooves had their grand performance to wrap up their season –kudos to the students and sponsors for both of these groups! The several of the clubs have already had their end of the year party-- which is an indication the school year is coming to an end. Graduation will be May 29th at 2:00 PM and our Annual Awards Assembly will begin at 10:45 AM on June 4th . Both of these events will be held in the Mustang Center. Wishing you all a Happy Mother’s Day!

Jim Kelly II

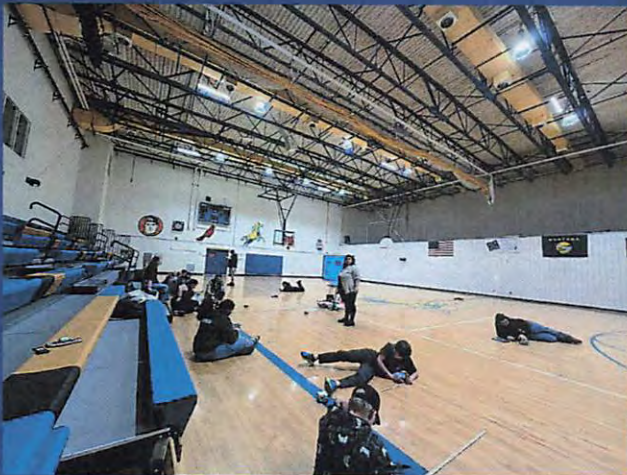


# Starbase Robotics Activity

By Josh



**We controlled the robots with an iPad. We put in codes on the iPad, and then the robot did what we told it. I made my robot go in a straight line, turn around, and come back to me. I also made my robot weave around cones and then come back the same way. I then made my robot go 1 yard turn right and go another yard and turn right over and over till it completed a square. I like robots, and it was a lot of fun !**







## Fun at the Museums

*By Madison*

**Hello, I'm Madison. I had a lot of fun with Ayvia and Amanda. We went to two museums together. At the museums, we looked at many old pictures about history. The pictures showed different times and stories from the past. After looking at the pictures, we wrote about what we saw and learned. It was a nice day, and I enjoyed it very much. Thank you for reading my story.**



## 4-H Bird Houses

*By Megan DeSilva*



**We have been busy in 4-H these past two months! Cooking 101 wrapped up in April. The members made a slew of recipes, including brownies, sloppy joes, peanut butter kisses, spaghetti, and salad. They learned about the basics of cooking, while enjoying some treats! Our community service project this year was to "make birdhouses, so the birds have a place to live." The materials were donated, and we used some extra paint from the cottage to make them more individualized. They will be hung up outside of the cottage. Our last project of the year will be to plant some flowers in the cottage pots out front. We will go shopping for flowers mid-May, and plant them right before it's time to go home for the school year. Thank you to Farmer's Union for providing our club funds to complete this project.**





## A Night To Remember: Our Amazing Prom!

By Ayvia



**Hi! My name is Ayvia, and I want to tell you all about our amazing prom night! Our prom theme was a fun mix of Las Vegas and Hawaiian style, and it looked so cool and beautiful. The decorations made everything feel exciting, bright, and unforgettable. We had lots of delicious food from different restaurants, so there was something for everyone to enjoy. We also had awesome music played by our DJ, Tyler H, who is the best DJ ever! He kept the music going all night and made the dance floor so much fun. One of the most exciting parts of the night was voting for Prom Queen and Prom King.**

**A big congratulations to Prom King David and Prom Queen Madison! Woohoo! It was such a fun and beautiful night that we will always remember!**



## Prom from a Younger Perspective

By Myra



**I got dressed up to go to the prom with the boys and girls. We danced for the prom and took photos. We also played Limbo and played together. We got to eat cupcakes, and I had fun!**





### Weekly Student Life Activities

- EOS (Mon/Wed)
- 4-H (Tues)
- Goal Ball (Tues and Thurs)
- Flying Hooves-Elem. (Tues)
- Moving Mustangs (Tues 2x/mo)
- Computer Club (Tues 2x/mo)
- Student Life Social Hour (Wed)
- Student Council (Wed)
- Snack Shack (Wed/Fri)
- Flying Hooves-MS/HS (Thurs)
- Gaming Club (Fri)
- Dungeons & Dragons (Fri)
- Alley Cats Bowling Club (Sun)



## Meal Planning in the Cottage

By Megan DeSilva

**Meal planning in the cottage at MSDB is a student-centered activity that builds independence, teamwork, and life skills. Each week, staff guide the process by selecting three recipe options for each meal. Students are given a voice by reviewing the options and voting on which recipes they'd like to prepare. This approach gives students ownership over their meals and increases engagement, since they're more likely to be excited about cooking something they choose.**

**Once the votes are in, the winning recipes become the plan for the week. Currently, students are involved in cooking both lunch and dinner every Sunday, working alongside staff for support and instruction. This allows them to practice a range of skills, from reading recipes and measuring ingredients to using knives safely and cleaning up afterward.**

**Staff play a key role in modeling techniques, ensuring safety, and providing encouragement, but the students are at the center of the experience. Over time, this consistent routine helps build confidence and fosters a sense of accomplishment. Meal planning in the cottage isn't just about preparing food—it's about preparing students for greater independence.**



# Arby's at the Cottage Dinner

By David



**The Arby's Dinner at the Cottage is where we made sandwiches and fries. Also, teamwork helped on different tasks for the Arby's dinner. Other students and I helped to cook and had different tasks for the sandwiches. The staff helped guide the different students, including myself, to cook and make sandwiches.**



## Cottage Menu

Arby's at the Cottage

Pizza Muffins

Hawaiian Mac 'n  
Cheese

Tuna Sandwiches

Cheeseburger Pasta



## Spring Formal Dinner

By Lillian

Hey, this is Lillian. I'm going to talk about the formal dinner.

I went wearing a cute, blue dress with my hair down, and I felt really good about how I looked. When I got there, I walked to the lunchroom with some girls and found a place to sit. They joined me, and we all sat together, talking and laughing. We got our food, but I didn't eat much since I had already been at a softball party before coming. Still, I made sure to eat a little.

I had to leave a bit early because I needed to pick up my sisters from their softball practice, but overall it was a really fun and enjoyable night!



## Ice Breaker

By Ayvia

Hi! My name is Ayvia. Today was such a fun and crazy day! Our whole cottage went downtown to do the Ice Breaker. It was so cold outside—everyone was freezing and didn't really want to do it at first. But we did it anyway, and I'm really glad we did! It turned out to be super fun. At one point, it was a group of boys and just one girl, and they actually beat the high schoolers, which was pretty awesome! Even though we were all cold, we laughed a lot and had a great time. Definitely a day I'll remember!







## Spring Campus Enrichment Days (CED)

*By Alissa Kline*

**"Saddle Up For Success" - This was the theme for our Spring's Campus Enrichment Days (CED), which took place on April 17th-18th. We welcomed students from around Montana to join us for a fun-filled weekend. On Friday, students engaged in rodeo-themed lessons in classrooms. They enjoyed activities such as making tactile paper horses and using soup cans to represent barrels for tabletop barrel races. Friday evening, students were amused to find out their cowboy/cowgirl name, found it to be a joyful challenge to learn the Cowboy Hustle Dance, and they had a blast with typical Cottage activities such as swimming and bowling. Saturday was full of laughs and entertainment as students barrel raced, practiced roping and rode a "bucking bull". Thanks to all who joined us for this amazing event. We hope to see you again next year!**





## 2025-2026 Student of the Quarter -3rd Quarter

*By Megan DeSilva*

**Now is the time to announce our Student of the Quarter for the third quarter.**

**This student has been taking responsibility without being asked—setting alarms, showing up on time, and staying on top of their schedule like a pro. Their room is consistently clean every morning. Their chores and personal responsibilities are handled with care and independence.**

**They've been putting real effort into personal growth—practicing breathing exercises, improving how they handle tough moments, and becoming more accepting when things don't go their way. Compared to last year, their interactions with staff and peers have grown stronger, with fewer arguments and more accountability.**

**You'll also find them showing up—whether it's at school, after-school activities, work at Paris Gibson, or even 4-H. Their consistency and commitment don't go unnoticed. And in Shoshone (the girls cottage), they're almost always in the "green zone"—a huge reflection of their progress!**

**So, who is this awesome, responsible, cat-loving superstar?**

**Congratulations to Ayvia, our 3rd Quarter Student of the Quarter!**

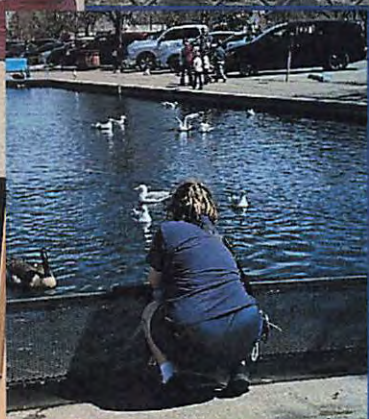
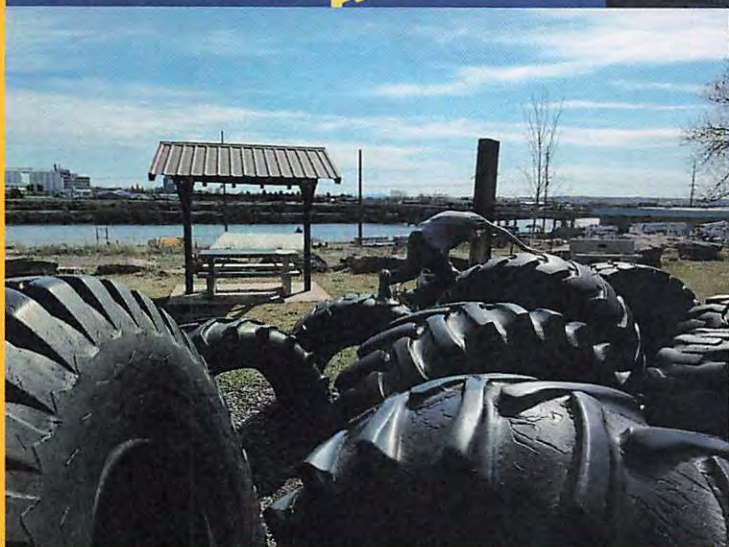
**We're so proud of the growth, effort, and positive changes you've made!**



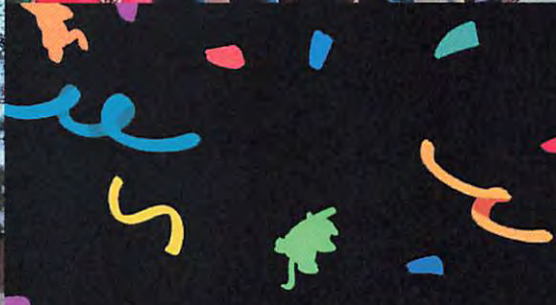
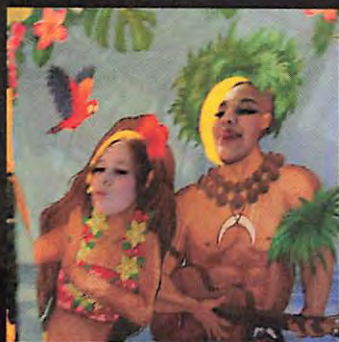




# A Day in the Life at MSDB







Prom at MSDB



**\*\*\*\*\*Time Certain at 11:15AM\*\*\*\*\***

**❖ LICENSURE COMMITTEE – (Items 7-11)**

**Dr. Ron Slinger**

**ITEM 7**

**ACTION AND INFORMATION ON INITIAL  
REVIEW OF BPE CASE #2026-04, KNIGHT**

**Brenton Craggs**

**ITEM 8**

**ACTION AND INFORMATION ON INITIAL  
REVIEW OF BPE CASE #2026-06, WHITNEY**

**Brenton Craggs**

## **ITEM 9**

# **ACTION ON THE EDUCATOR PREPARATION PROVIDER ACCREDITATION HANDBOOK**

**Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                                                                                                                                                  |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Educator Preparation Provider Accreditation Handbook                                                                                                                                                                                                                             |
| <b>Presenter</b>             | Crystal Andrews                                                                                                                                                                                                                                                                  |
| <b>Position Title</b>        | Senior Manager, School and Educator Effectiveness<br>Office of Public Instruction                                                                                                                                                                                                |
| <b>Overview</b>              | <p>Per ARM 10.58.102 (1), the Board of Public Education shall adopt procedures for the accreditation review of educator preparation providers.</p> <p>The handbook was drafted in collaboration with representatives from the OPI and Montana Educator Preparation Programs.</p> |
| <b>Requested Decision(s)</b> | Action Item                                                                                                                                                                                                                                                                      |
| <b>Related Issue(s)</b>      |                                                                                                                                                                                                                                                                                  |
| <b>Recommendation(s)</b>     | Approve the Educator Preparation Provider Accreditation Handbook, as recommended by State Superintendent Hedalen.                                                                                                                                                                |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)



# **Educator Preparation Program Accreditation Process and Procedures Manual**



Updated  
Spring 2026

# Table of Contents

|                                                                                                  |           |
|--------------------------------------------------------------------------------------------------|-----------|
| <b>Table of Contents</b>                                                                         | <b>2</b>  |
| <b>Introduction</b>                                                                              | <b>3</b>  |
| <b>Section I: Montana Professional Educator Preparation Program Standards (PEPPS)</b>            | <b>4</b>  |
| <b>Section II: Initial Accreditation Process</b>                                                 | <b>6</b>  |
| APPROVAL FOR EPP PRELIMINARY ACCREDITATION PROCESS:                                              | 7         |
| <b>Section III: Approval of New Curricular Programs</b>                                          | <b>9</b>  |
| Process for State Approval of Professional Education Programs Leading to Educator Certification: | 10        |
| <b>Section IV: Accreditation Process</b>                                                         | <b>12</b> |
| <b>State Review Protocol</b>                                                                     | <b>14</b> |
| State Review - Accreditation Cycle Timeline                                                      | 18        |
| <b>Joint CAEP/State Review Protocol</b>                                                          | <b>19</b> |
| Joint CAEP/State Review Accreditation Cycle - Timeline                                           | 25        |
| <b>Section V: Accreditation Resources</b>                                                        | <b>27</b> |
| A: Annual Report                                                                                 | 27        |
| Approved Programs Template                                                                       | 27        |
| Annual Educator Preparation Program Report                                                       | 28        |
| B: Good Cause Extension                                                                          | 29        |
| C: State On Site Visit Agenda EXAMPLE                                                            | 30        |
| D: State Program Report Narrative SAMPLE                                                         | 31        |
| E: State Institutional Self-Study Report (ISSRs) EXAMPLE                                         | 31        |
| F. State Definitions of Ratings                                                                  | 33        |

## **Introduction**

The purpose of accrediting an Educator Preparation Program (EPP) is to ensure that all professional education programs which lead to educator licensure meet established standards. The Professional Educator Preparation Program Standards (PEPPS) guide these programs in developing curriculum, instructional strategies, aligned assessments, and relevant field and clinical experiences to prepare educator candidates to meet the learning needs of PK- 12 students.

This manual outlines the processes and procedures for the accreditation review of Montana's educator preparation providers.

## Section I: Montana Professional Educator Preparation Program Standards (PEPPS)

Adoption of PEPPS by the Board of Public Education (BPE) as Administrative Rules of Montana (ARM) establishes the accreditation and accountability requirements for Montana's EPPs.

The PEPPS which make up Administrative Rules of Montana (ARM) Title 10, Chapter 58, Sub-Chapters 1, 3, 5, 6, 7, and 8, constitute the core of professional educator preparation programs in Montana. The PEPPS are aligned to national standards, specifically the [Council for the Accreditation of Educator Preparation \(CAEP\)](#) initial and advanced standards.

The Interstate Teacher Assessment and Support Consortium, "[InTASC Standards](#)," have also been incorporated in [ARM 10.58.501](#). The standards outlined in ARM 10.58.501 and the InTASC standards are general requirements to assure a common set of expectations in the preparation of professional educators in all content and specialty areas.

Below is a description of each chapter of the [Administrative Rules of Montana \(ARM\) Title 10 Chapter 58](#):

### **Sub-Chapter 1: State Administrative Procedural Standards**

Outlines the process and procedures leading to the accreditation site reviews.

### **Sub-Chapter 2: Conceptual Framework of Professional Educator Preparation Programs**

*Repealed*

### **Sub-Chapter 3: Curriculum Principles and Standards: Basic Programs**

The Performance standards for initial licensure programs define the criteria that institutions and professional education programs must meet to demonstrate compliance and program quality. The initial licensure performance standards include content and pedagogical knowledge, clinical partnerships and practice, candidate quality, recruitment, progression and support, program impact, and provider quality assurance and continuous improvement.

### **Sub-Chapter 4: Teaching Areas: General Standards**

*Repealed*

### **Sub-Chapter 5: Standard 501 - Teaching Standards**

A common set of expectations in the preparation of professional educators in all content and specialty areas.

### **Sub-Chapter 502 - 534: Teaching Areas: Specific Standards**

Performance-based standards for the preparation of educator candidates in each endorsement area for initial teaching licensure. These criteria must be considered in the development and implementation of program endorsement areas.

### **Sub-Chapter 6: Curriculum Principles and Standards: Advanced Licensure Programs**

The Performance standards for advanced licensure programs define the criteria that institutions and professional education programs must meet to demonstrate compliance and program quality. The advanced licensure performance standards include content and pedagogical knowledge, clinical partnerships and practice, candidate quality, recruitment, progression and support, program satisfaction with preparation, and provider quality assurance and continuous improvement.



**Sub-Chapter 7: Specializations: Supervisory and Administrative Programs**

Performance-based standards for the preparation of educator candidates in each endorsement area for advanced licensure.

**Sub-Chapter 8: Innovative and Experimental Programs**

Processes and procedures for the approval of new curriculum programs.

**Sub-Chapter 9: Standards for Approving Competency-Based or Performance-Based Programs**

*Repealed*

## Section II: Initial Accreditation Process

### **Preliminary Accreditation - Professional Education Provider**

Before state accreditation is considered, an organization or institution seeking preliminary accreditation as a new educator preparation provider must have formal authorization from their administrative board charged with this responsibility. An institution can be either a traditional or alternative program. A traditional program refers to a program at an Institution of Higher Education (IHE) where candidates enroll with the specific goal of becoming a teacher and are awarded a degree. An alternative program can be either IHE-based or non IHE-based and designed to prepare individuals to become teachers. An alternative preparation program that is non IHE-based is defined in [20-4-120, MCA](#). To gain preliminary accreditation status from the Board of Public Education (BPE) for either a traditional, IHE-based alternative, or non IHE based alternative program, the following steps outlined in the chart below are required.

- Formal authorization from the administrative board of the institution or organization is submitted to the Office of Public Instruction (OPI);
- An IHE provides evidence of [institutional accreditation to the OPI](#);
- The new EPP completes the Institutional Self-Study Report (ISSR) with evidence demonstrating compliance with the BPE program preparation standards.
- The ISSR and supporting evidence are electronically submitted to the OPI.
- The OPI facilitates an off-site review of the ISSR. The off-site review process shall follow the approved state protocol outlined in the BPE-approved Professional Educator Preparation Program Standards and Procedures Manual;
- Based on the off-site review report, the Superintendent of Public Instruction shall recommend preliminary accreditation status to the BPE;
- If the recommendation from BPE is to preliminary accredit, the new EPP may only be recognized as preliminarily accredited until the OPI conducts formal on-site visit within two years;
- The OPI site visitor team submits the state final report to the State Superintendent;
- The State Superintendent makes a recommendation to approve/disapprove the EPP for final accreditation to the BPE based upon the site team report;
- The BPE takes final action on the State Superintendent's recommendation.

**APPROVAL FOR EPP PRELIMINARY ACCREDITATION PROCESS:**

Administrative Rules of Montana 10.58.802

| Step 1: Initial Approval                                                                                                                                | Date Submitted |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Notify the OPI of intention to apply for a new EPP program and obtain necessary documents.                                                              |                |
| Institutional governing body, i.e., board of directors, institutional leadership, or Board of Regents, as applicable, approves new program application. |                |
| Verification of institutional accreditation, if applicable.                                                                                             |                |

| Step 2: Application Process                                                                                                                                                                                                                                                                                                                                   | Date Submitted |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| EPP completes the Institutional Self-Study Report (ISSR) to address Administrative Rules of Montana (ARM)10.58.802.                                                                                                                                                                                                                                           |                |
| EPP completes sections of the ISSR addressing how the new EPP is aligned with ARM 10.58.311 – 315 for initial program and 10.58-605-609 for advanced program.                                                                                                                                                                                                 |                |
| EPP completes sections of the ISSR addressing ARM 10.58.501 Teaching Standards; and specific sections of ARM 10.58.502-534 related to the endorsement areas offered by the new EPP.                                                                                                                                                                           |                |
| EPP gathers supporting evidence aligned to the ISSR. Supporting evidence may include: course catalogs, course syllabi, candidate work samples, surveys, sample assessments, portfolios, supervised teaching handbooks, data artifacts, self reflection artifacts, lesson plans, professional learning logs, observation logs, and other appropriate evidence. |                |

| Step 3: Application Submission                                                     | Date Submitted |
|------------------------------------------------------------------------------------|----------------|
| EPP submits completed ISSR and supporting documentation electronically to the OPI. |                |

| Step 4: Office Audit/Review                                                                                | Date Submitted |
|------------------------------------------------------------------------------------------------------------|----------------|
| OPI conducts the audit/review of the application materials.                                                |                |
| OPI provides an electronic report to EPP with comments and specific requests for additional documentation. |                |
| EPP submits a follow-up report/response to OPI, as necessary.                                              |                |

| Step 5: Preliminary Approval Process                                                                                                                        | Date Submitted |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| The OPI off-site review team submits the off-site report to the State Superintendent.                                                                       |                |
| The State Superintendent makes a recommendation to approve/disapprove the EPP for preliminary accreditation to the BPE based upon the off-site team report. |                |
| BPE takes action on the State Superintendent's recommendation for preliminary accreditation status.                                                         |                |

| Step 6: Final Approval Process                                                                                                                      | Date Submitted |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| The OPI shall conduct a site visit of the preliminary accredited professional education unit within two years;                                      |                |
| The site visitor team submits the site state final report to the State Superintendent.                                                              |                |
| The State Superintendent makes a recommendation to approve/disapprove the full accreditation of the EPP to the BPE based upon the site team report. |                |
| BPE takes final action on the State Superintendent's recommendation.                                                                                |                |



### **Section III: Approval of New Curricular Programs**

An accredited educator preparation provider may request the approval of a new curricular program by describing the purpose, need, and objectives of the program and the impact on K-12 education. Through the process, the EPP must assure that the program of study is based on current research, proven practice, and emerging trends in this field of K-12 school curriculum. The EPP will be required to demonstrate that it worked cooperatively with accredited school districts, education organizations, agencies, and P-20 stakeholders to design the program. Within the application process the provider will:

- Articulate initial and/or advanced candidates' learning expectations pursuant to ARM Title 10, chapter 58, subchapters 3, 5, 6, and 7.
- Align learning expectations and outcome assessments to the program objectives.
- Describe the professional learning process, plan, and timeline to prepare candidates.
- Establish assessment and evaluation systems to collect, analyze, use, and report initial or advanced candidates' progress in the program.
- Ensure that the program is supported by identifiable resources available to the program and resources not under the control of the program shall be outlined and confirmed by the Board of Public Education.
- Create a timetable that includes:
  - the program's proposed implementation date,
  - the sequence of activities that will occur,
  - selection and schedules of regular and systematic intervals of candidate and program evaluations,
  - the approximate date for submitting the program plan, timeline, and reports for program approval to the appropriate officials and to the OPI, and
- Ensure that program evaluations have definite provisions for performance criteria and follow-up at specified intervals, and the evaluations:
  - align to initial or advanced standards pursuant to ARM Title 10, chapter 58, subchapters 3, 5, 6, and 7, and
  - ensure continuous program improvement by using data to inform decisions that provide positive impact on candidates' professional growth and on program development.

**Process for State Approval of Professional Education Programs Leading to Educator Certification:**

Administrative Rules of Montana 10.58.802

| Step 1: Initial Approval                                                                                                                        | Date Submitted |
|-------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Notify the OPI of intention to apply for a new curricular program and obtain necessary documents.                                               |                |
| EPP's governing body, i.e., board of directors, institutional leadership, or Board of Regents, as applicable, approves new program application. |                |

| Step 2: Application Process                                                                                                                                                                                                                                                                                                                                                     | Date Submitted |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| EPP completes the Institutional Self-Study Report (ISSR) to address Administrative Rules of Montana (ARM)10.58.802                                                                                                                                                                                                                                                              |                |
| EPP completes sections of the ISSR addressing how the new EPP is aligned with ARM 10.58.311 – 315 for initial programs and ARM 10.58.605-609 for advanced programs.                                                                                                                                                                                                             |                |
| EPP completes sections of the ISSR: ARM 10.58.501 Teaching Standards; and specific sections of ARM 10.58.502-534 related to the new program endorsement areas.                                                                                                                                                                                                                  |                |
| EPP gathers supporting evidence aligned to the specific ISSR sections. Supporting evidence may include: course catalogs, course syllabi, candidate work samples, surveys, sample assessments, portfolios, supervised teaching handbooks, data artifacts, self reflection artifacts, lesson plans, professional learning logs, observation logs, and other appropriate evidence. |                |

| Step 3: Application Submission                                                | Date Submitted |
|-------------------------------------------------------------------------------|----------------|
| EPP submits completed ISSR and supporting evidence electronically to the OPI. |                |

| Step 4: Office Audit/Review                                                                                | Date Submitted |
|------------------------------------------------------------------------------------------------------------|----------------|
| OPI conducts the audit/review of the application materials.                                                |                |
| OPI provides an electronic report to EPP with comments and specific requests for additional documentation. |                |
| EPP submits a follow-up report/response to OPI, as necessary.                                              |                |

| Step 5: Site Visit                                                                                                                                                                                                                                                                                                                    | Date Submitted |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| If the EPP is scheduled for a regular accreditation site review within the next two years, the new curricular program is included in the site-review                                                                                                                                                                                  |                |
| If an EPP is not scheduled for a regular accreditation review within two years, the OPI will determine the necessity of a site review on a case-by-case basis. This decision will consider factors such as previous accreditation ratings, program variance, or the similarity of the new curriculum program to established programs. |                |
| OPI facilitates the site review to verify the ISSR meets the PEPP Standards of the new curricular program.                                                                                                                                                                                                                            |                |

| Step 6: Final Approval Process                                                                                                                        | Date Submitted |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| The site visitor team submits the state final report to the State Superintendent.                                                                     |                |
| The State Superintendent makes a recommendation to approve/disapprove the proposed new curricular program to the BPE based upon the site team report. |                |
| BPE takes final action on the State Superintendent's recommendation.                                                                                  |                |

## Section IV: Accreditation Process

The process leading to accreditation of Education Preparation Programs is outlined in [ARM 10.58.102](#). The BPE adopts procedures for the accreditation of EPPs and the State Superintendent is responsible for implementing the procedures and conducting the accreditation site reviews. The OPI establishes and trains a cadre of qualified educators to serve on the review teams. The accreditation site reviews occur every seven years or are adjusted based upon coordination with national accreditation or upon request of the EPP for approval from the BPE for a good cause extension.

A good cause extension is a formal request allowing an EPP to extend its accreditation term—typically for up to one year—due to unforeseeable, uncontrollable circumstances like natural disasters, major regulatory shifts, or new state/national standards. An EPP may submit a formal letter to the Superintendent of Public Instruction explaining the basis for the request.

There are two types of accreditation site reviews: a state only review and a joint accreditation review. An EPP selects the type of accreditation review that they want conducted. The state only accreditation review is conducted by the OPI under the supervision of the superintendent, whereas the joint review is completed in cooperation with a national accreditation agency. Currently, there are three national accreditation agencies: the [Council for the Accreditation of Educator Preparation](#) (CAEP), the [Association for Advancing Quality in Educator Preparation](#) (AAQEP), and the [Montessori Accreditation Council for Teacher Education](#) (MACTE). Additional accrediting agencies that conduct particular reviews of standards are also part of a state or joint review if requested by an EPP, such as the [Council for Accreditation of Counseling and Related Educational Programs](#) (CACREP) for school counseling and the [National Association of School Psychologists](#) (NASP) for school psychology.

The purpose of the accreditation review is to verify that an EPP meets the requirements of the Montana PEPPS. An accreditation review has two parts: the off-site review and the onsite review. The EPP submits to the OPI an Institutional Self-Study Report (ISSR). Within the ISSR, the EPP provides evidence of standards, such as: catalogs, programs of study, assessment system information, surveys of need, course syllabi, candidate work samples, surveys, sample assessments, portfolios, supervised teaching handbooks, data artifacts, self reflection artifacts, lesson plans, professional learning logs, observation logs, and other appropriate evidence.

Using the evidence provided, each standard is rated as:

- **Standard is met:** Regular accreditation for a period of seven years.
- **Standard is met with notation:** Regular accreditation with minor deviations with most of the components of a standard met. This could involve incomplete items on the ISSR or clarification/corrections needed. As those items are rectified, the recommendation to the BPE will reflect the current and corrected status.
- **Area for Improvement (AFI):** Standard is met with weakness. The site review team identified a weakness in the evidence for a standard or component. Area for Improvement should be remediated by the next accreditation cycle, and progress toward improvement is reported annually through the annual report to the OPI/BPE. During the next accreditation review, the EPP must demonstrate that the AFIs have been corrected. If the AFIs have not been corrected, a



stipulation may be cited in the same area.

- **Stipulation:** A standard or component is not met. The site visiting team identified a deficiency related to one or more components of the BPE standard. A stipulation is of sufficient severity that a standard may be determined to be unmet. A stipulation must be addressed within two years to retain accreditation.

An EPP cited with an area of stipulation is required to submit a progress report to the BPE exactly one year following the initial scoring. Subsequently, the OPI will conduct an onsite evaluation at the two-year mark to review the status of the identified stipulation(s). Based on these findings, a final review and formal recommendation will be presented to the BPE to either remove the stipulation or initiate the revocation of accreditation.

Prior to a site accreditation visit, a cadre of qualified educators including teachers, college professors, administrators, and content specialists review the ISSRs provided by the EPP. After the review, the EPP is provided with a preliminary accreditation report. The EPP is given the opportunity to review the report and submit an addendum. The addendum is a formal, supplementary document that provides additional information, evidence, or clarification regarding specific issues identified during the accreditation review process. It is attached to the original report without changing the original content and becomes a formal part of the overall documentation. Based on the addendum, the identified areas are re-evaluated. A site review is then conducted. A site review is two-to-three days in which site reviewers conduct a summative review of the EPP ISSRs. Site reviews consist of focus groups of key stakeholders and interviews with EPP faculty to finalize standard ratings. After a site review is conducted, the State Superintendent provides the EPP with a draft of the final report. The report includes all review outcomes for each standard, including the review from national accreditation agencies if applicable. The EPP is given the opportunity to review the report and attach a rejoinder. The rejoinder is an optional written response to the site review report submitted by the EPP, post site review. This response allows an EPP to state whether or not they agree with the evaluation team's findings; however, an EPP cannot include new and/or additional evidence with the rejoinder.

## State Review Protocol

| Category                                                 | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Standards</b>                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>I. Program Standards</b>                              | The Montana Board of Public Education (BPE) has incorporated the CAEP standards into the Montana Professional Educator Preparation Program Standards (PEPPS).                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>II. Content Standards</b>                             | State standards adopted by the BPE are used to accredit professional education programs that lead to specific licenses and endorsements. The Montana PEPPS are comprised of the BPE adopted requirements for all licensure and endorsement programs and are aligned with national content standards.                                                                                                                                                                                                                                                                       |
| <b>III. Accreditation &amp; Approval</b>                 | The BPE is authorized to establish accreditation standards and procedures and to determine accreditation status of the EPP's and state approved alternative programs.                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>IV. Team</b>                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>A. Team Composition</b>                               | <p>The OPI selects team members from a cadre of professionals who have completed training on the accreditation process. The OPI selects team members whose expertise, training and/or endorsement reflects programs to be reviewed.</p> <p>It is recommended that site review teams include at least one EPP representative.</p>                                                                                                                                                                                                                                           |
| <b>B. Training and Qualifications</b>                    | Program reviewers must have a minimum of five years of teaching or other appropriate experience. All program reviewers must complete training in the standards and the review process and procedures.                                                                                                                                                                                                                                                                                                                                                                      |
| <b>C. Professional Conduct/<br/>Conflict of Interest</b> | <p>Program reviewers shall conduct themselves at all times while representing the BPE and OPI as thoughtful, competent, well-prepared, and impartial professionals. Reviewers must treat all matters confidentially and honor and support all consensus decisions of the team.</p> <p>All reviewers are required to sign and submit a Conflict of Interest form to the OPI. The program reviewers shall avoid conflicts of interest and should exclude themselves from the review team for any reason which may represent an actual or perceived conflict of interest.</p> |
| <b>D. Team Chairperson</b>                               | An OPI representative who participates in and serves as the point of contact for the off-site and site reviews and works directly with the review team(s).                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>E. State Coordinator</b>                              | An OPI representative who oversees the coordination and logistics of the accreditation review process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

| Category                                         | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>F. Team Size</b>                              | The size of the on-site review team shall be determined by the OPI.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>G. Decision Making</b>                        | The team shall make decisions by consensus and the team chairperson will resolve all conflicts.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>H. Evaluations</b>                            | Following the site visit, the performance of the team is evaluated by the OPI.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>I. Expenses</b>                               | The EPP covers the expenses of the on-site visit including the expenses of the non-OPI members of the site team. The OPI covers the expenses of the OPI team members.                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>V. Preparation</b>                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>A. Accreditation Cycle</b>                    | <p>Montana EPP's and state approved alternative programs follow a seven-year review cycle after successfully completing an initial accreditation review.</p> <p>A request for a good cause extension can be submitted for consideration. If granted, the extension is for one year only and does not alter the established accreditation seven year cycle.</p>                                                                                                                                                                                                                                                                  |
| <b>B. Scheduling the Review</b>                  | Twelve months prior to the site review semester, the dean of education of the EPP, or other appropriate official, shall work with the OPI to set the dates of the visit and review the list of specific programs to be reviewed. The visit shall not exceed three days.                                                                                                                                                                                                                                                                                                                                                         |
| <b>C. Manual</b>                                 | The Educator Preparation Program Accreditation Process and Procedures Manual contain the standards, guidelines, forms, support and resource material for the unit reviews.                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>D. Institutional Self Study Report (ISSR)</b> | <p>The ISSR provides evidence to verify compliance with the standards pertaining to the unit and applicable program areas.</p> <p>The EPP and state approved alternative program submits to the OPI an electronic copy of the ISSR. The ISSR's must be received by OPI at least four months before the scheduled visit. In addition, the EPP will provide links to its catalog(s), syllabi, access to database materials, and other relevant information pertinent to the effectiveness of the review process. These materials must be evaluated by the team members starting at least 14 weeks prior to the on-site visit.</p> |

| Category                                        | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>E. Program Report</b>                        | <p>The initial review of the EPP's programs is completed prior to the on-site visit using an off-site review process. The off-site program review is facilitated by the team chairperson and completed four months prior to the on-site review.</p> <p>The initial report of the off-site review is emailed to the EPP six weeks before the site visit.</p> <p>The EPP may submit an addendum to the preliminary report within three weeks prior to the onsite visit.</p> |
| <b>F. Pre Visit</b>                             | Approximately 60 days before the visit, the state coordinator and team chair will meet with the EPP dean to plan the visit.                                                                                                                                                                                                                                                                                                                                               |
| <b>VI. Review Process</b>                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>A. Orientation to State Process/Protocol</b> | The state coordinator and the team chair will conduct an orientation with the review team about the state accreditation process and accreditation protocol.                                                                                                                                                                                                                                                                                                               |
| <b>B. Access to Evidence</b>                    | <p>EPP's shall provide evidence that demonstrates what candidates know and are able to do. In addition, EPP's are required to provide evidence that data is used to evaluate student performance and modify programs. EPP's shall include data.</p> <p><i>Evidence could include: assessments at admissions; verification of content knowledge; program assessments; follow-up studies.</i></p>                                                                           |
| <b>C. Off-site Review</b>                       | An off-site review is a preliminary, virtual evaluation where review teams examine the ISSR and evidence. Conducted by the OPI, it verifies evidence before the on-site visit to ensure program compliance and quality.                                                                                                                                                                                                                                                   |
| <b>D. Addendum</b>                              | The EPP may submit a formal, supplementary document that provides additional information, evidence, or clarification regarding specific issues identified during the accreditation review process. It is attached to the original report without changing the original content and becomes a formal part of the overall documentation.                                                                                                                                    |
| <b>E. On-site Review</b>                        | An on-site review for EPP accreditation is a mandatory, in-person (or virtual) evaluation conducted every seven years by a team representing the BPE and the OPI. This review verifies the accuracy of the ISSR and evaluates evidence of program quality, continuous improvement, and candidate performance.                                                                                                                                                             |
| <b>F. Final Conference</b>                      | The team chair conducts the final conference with the EPP and institution representatives.                                                                                                                                                                                                                                                                                                                                                                                |



| Category                               | Procedure                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>VII. After the On-Site Review</b>   |                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>A. State Final Report</b>           | <p>The standard ratings are completed and the state final report is drafted within one month following the on-site visit.</p> <p>The state final report is compiled by the team chair person in consultation with the state coordinator.</p>                                                                                                                                            |
| <b>B. Rejoinder</b>                    | <p>The EPP may submit an optional written response to the report concerning errors or omissions within 3 weeks after the report is received and before it is submitted to the BPE for action. This response allows an EPP to state whether or not they agree with the evaluation team's findings; however, an EPP cannot include new and/or additional evidence with the rejoinder.</p> |
| <b>C. Action on State Final Report</b> | <p>The state final report is submitted to the BPE as an informational item, allowing the EPP to be present for discussion. The BPE will take action on the determination of the EPP's accreditation status at the next meeting. The determination will then be reported by the OPI to the EPP.</p>                                                                                      |
| <b>VIII. Annual Reviews</b>            |                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>A. Regional Accreditation</b>       | <p>EPP's shall maintain institutional accreditation to continue state accreditation.</p>                                                                                                                                                                                                                                                                                                |
| <b>B. Annual Report</b>                | <p>EPP's provide information to OPI as part of the requested Annual Report for the BPE.</p>                                                                                                                                                                                                                                                                                             |

## State Review - Accreditation Cycle Timeline

| Task                                            | Timeframe                                                                                                                           | Who?                   |
|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| ISSR templates sent to EPP                      | 8 months prior to onsite review                                                                                                     | OPI                    |
| EPP Training/<br>Evaluation Team Formed         | 6 months prior to onsite review                                                                                                     | OPI                    |
| Complete ISSRs/<br>Review Team Training         | 4 months prior to onsite review                                                                                                     | EPP<br>OPI/Review Team |
| State Off-site Review<br>(Evaluation of ISSRs)  | 14 weeks prior to onsite review                                                                                                     | OPI/Review Team        |
| Pre- visit meeting                              | 2 months prior to onsite review                                                                                                     | EPP/OPI                |
| Preliminary Draft State<br>Accreditation Report | 6 weeks prior to onsite review                                                                                                      | OPI                    |
| Addendum                                        | 3 weeks prior to onsite review                                                                                                      | EPP                    |
| State On-Site Review                            | 1-3 days of a site visit<br>scheduled 8 months in<br>advance and detailed<br>agendas are shared 4 weeks<br>in advance of site visit | EPP/OPI                |
| Final State Accreditation Report                | 1 month after onsite review                                                                                                         | OPI                    |
| Rejoinder                                       | 3 weeks after final report                                                                                                          | EPP                    |
| Information Item for BPE                        | 1st available BPE meeting<br>following report/rejoinder                                                                             | OPI/EPP to BPE         |
| Action Item for BPE                             | Consecutive BPE Meeting<br>following the information<br>item.                                                                       | BPE                    |

## Joint CAEP/State Review Protocol

| Category                                     | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>I. Agreements</b>                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>A. MOU</b>                                | <p>The agreement is between the BPE, CAEP, and the State Superintendent.</p> <p>Prior to joint reviews, CAEP and the State enter into an agreement detailing the State's preferences with regard to program review options and review team composition for accreditation Site Reviews conducted by CAEP of EPP's operating within the State and establishing the primary responsibilities each party has in supporting CAEP's accreditation activities involving all such EPP's.</p> |
| <b>B. State Accreditation &amp; Approval</b> | The BPE is authorized to establish accreditation standards and procedures and to determine accreditation status of the EPP's and state approved alternative programs.                                                                                                                                                                                                                                                                                                                |
| <b>C. CAEP Accreditation &amp; Approval</b>  | The CAEP Accreditation Council considers recommendations by the CAEP site review team and makes final decisions regarding CAEP accreditation status, areas for improvement and/or stipulations, and standards met or unmet. Upon its decision, the CAEP Accreditation Council notifies the state for use in the final state/CAEP combined report.                                                                                                                                    |
| <b>II. Standards</b>                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>A. Program Standards</b>                  | The Montana Board of Public Education (BPE) has incorporated the CAEP standards into the initial and advanced standards of the Montana Professional Educator Preparation Program Standards (PEPPS). For a joint review, CAEP assesses 10.58.311-315 for initial programs and 10.58.605-609 for advanced programs.                                                                                                                                                                    |
| <b>B. Content Standards</b>                  | <p>The state team reviews 10.58.501 teaching standards and any applicable content standards from 10.58.502-534 for initial programs and applicable content standards for ARM 10.58.705-707 and 10.58.610 for advanced programs.</p> <p>Results of these reviews are shared with the CAEP review team.</p>                                                                                                                                                                            |
| <b>III. Review Teams</b>                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>A. State Team Composition</b>             | <p>The OPI selects team members from a cadre of professionals who have completed training on the accreditation process. The OPI selects team members whose expertise, training and/or endorsement reflects programs to be reviewed.</p> <p>It is recommended that site review teams include at least one EPP representative.</p>                                                                                                                                                     |

| Category                                             | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>B. CAEP Team Composition</b>                      | <p>CAEP oversees the selection, training, and evaluation of CAEP team members. Teams are typically composed of a team lead and four team members.</p> <p>An OPI representative sits as an observer in a non evaluative role.</p>                                                                                                                                                                                                                                                                                                                                                             |
| <b>C. Training and Qualifications</b>                | <p>State program reviewers must have a minimum of five years of teaching or other appropriate experience. All state program reviewers must complete training in the standards and the review process and procedures.</p> <p>CAEP program reviewers are selected by CAEP and undergo CAEP training.</p>                                                                                                                                                                                                                                                                                       |
| <b>D. Professional Conduct/ Conflict of Interest</b> | <p>State program reviewers shall conduct themselves at all times while representing the BPE and OPI as thoughtful, competent, well-prepared, and impartial professionals. Reviewers must treat all matters confidentially and honor and support all consensus decisions of the team.</p> <p>All reviewers are required to sign and submit a Conflict of Interest form to the OPI and/or CAEP. The program reviewers shall avoid conflicts of interest and should exclude themselves from the review team for any reason which may represent an actual or perceived conflict of interest.</p> |
| <b>E. State Team Chairperson</b>                     | <p>An OPI representative who participates in and serves as the point of contact for the off-site and site reviews and works directly with the review team(s).</p>                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>F. State Coordinator</b>                          | <p>An OPI representative who oversees the coordination and logistics of the accreditation review process.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>G. CAEP Lead Site Reviewer</b>                    | <p>The head of the CAEP evaluation team who manages the site review and report process of an EPP's site review from the time of the formative meeting through the Accreditation Council decision.</p>                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>H. Team Size</b>                                  | <p>The size of the state on-site review team shall be determined by the OPI. CAEP determines the size of the CAEP team.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>I. Decision Making</b>                            | <p>The teams shall make decisions by consensus and the state team chairperson and CAEP Lead will resolve all conflicts.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>J. Evaluations</b>                                | <p>Following the site visit, the performance of the teams are evaluated by the OPI and CAEP.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>K. Expenses</b>                                   | <p>The EPP covers the expenses of the on-site visit including the expenses of the CAEP team and non-OPI members of the state team. The OPI covers the expenses of the OPI team members.</p>                                                                                                                                                                                                                                                                                                                                                                                                  |



| Category                                               | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                       |
|--------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <b>IV. Preparation</b>                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                       |
| <b>A. Accreditation Cycle</b>                          | <p>Montana jointly-accredited EPP's and state approved alternative programs follow a seven-year review cycle after successfully completing an initial accreditation review.</p> <p>Requests for a good cause extension can be submitted to CAEP and the BPE for consideration. If granted, the extension is for one year only and does not alter the established accreditation seven year cycle.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                       |
| <b>B. Scheduling the Review</b>                        | <p>Eighteen months prior to the site review semester, the dean of education of the EPP, or other appropriate official, shall work with CAEP and the OPI to set the dates of the visit and review the list of specific programs to be reviewed. The visit shall not exceed three days.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                       |
| <b>C. Manuals</b>                                      | <p>The Educator Preparation Program Accreditation Process and Procedures Manual contain the standards, guidelines, forms, support and resource material for the unit reviews.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <p>CAEP Policies and Procedures are set out in the <a href="#">CAEP Workbook</a>.</p> |
| <b>D. State Institutional Self Study Report (ISSR)</b> | <p>The ISSR uses OPI-provided templates to document evidence to verify compliance with the standards pertaining to the unit and applicable program areas in ARM 10.58.501 teaching standards and any applicable content standards from 10.58.502-534 for initial programs and applicable content standards for ARM 10.58.705-707 and 10.58.610 for advanced programs.</p> <p>The EPP and state approved alternative program submits to the OPI an electronic copy of the ISSR. The ISSR's must be received by OPI at least four months before the scheduled visit. In addition, the EPP will provide links to its catalog(s), syllabi, access to database materials, and other relevant information pertinent to the effectiveness of the review process. These materials must be evaluated by the team members starting at least 14 weeks prior to the on-site visit.</p> |                                                                                       |
| <b>E. CAEP Self Study Report (SSR)</b>                 | <p>The CAEP Self Study Report uses the CAEP AIMS system and CAEP-provided templates to document alignment with CAEP standards R1-R5 for initial programs and RA1-RA5 for advanced programs.</p> <p>The CAEP SSR includes narrative and uploaded evidence for each standard and is due 9 months prior to the site visit.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                       |

| Category                                        | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>F. State Program Reports</b>                 | <p>The initial state review of the EPP's programs is completed prior to the on-site visit using an off-site review process. The off-site program review is facilitated by the team chairperson and completed four months prior to the on-site review.</p> <p>The initial report of the off-site review is emailed to the EPP 30 days before the site visit.</p> <p>The EPP may submit an addendum to the preliminary report within three weeks prior to the onsite visit.</p>                                                                                                                        |
| <b>G. CAEP Program Reports</b>                  | <p>The CAEP Self Study Report is submitted via the CAEP system nine months prior to the site review per the deadline assigned by CAEP. The CAEP team will complete an off-site review of the SSR.</p> <p>In response to the SSR, the CAEP team will provide a Formative Feedback Report (FFR) to the EPP 5 months prior to the site visit.</p> <p>The EPP will submit a Self Study Addendum (Addendum) to the CAEP team 60 days after the receipt of the FFR.</p>                                                                                                                                    |
| <b>V. Pre Visit</b>                             | <p>Approximately 60 days before the visit, the state coordinator and team chair, and the CAEP team lead will meet with the EPP dean to plan the visit.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>VI. Review Process</b>                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>A. Orientation to State Process/Protocol</b> | <p>The state coordinator and the team chair will conduct an orientation with the review team about the state accreditation process and accreditation protocol.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>B. Access to Evidence</b>                    | <p>EPP's shall provide evidence that demonstrates what candidates know and are able to do. In addition, EPP's are required to provide evidence that data is used to evaluate student performance and modify programs. EPP's shall include data.</p> <p><i>Evidence could include: assessments at admissions; verification of content knowledge; program assessments; follow-up studies.</i></p> <p>Evidence used in the CAEP process is uploaded into CAEP's AIMS system. The OPI State Team Chairperson and State Team Coordinator are given access to evidence in the CAEP system per the MOU.</p> |
| <b>C. Off-Site Reviews</b>                      | <p>The state and CAEP teams will review evidence provided in the state ISSR and the CAEP SSR, respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Category                            | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>D. Addendums</b>                 | <p>Following reviews of the ISSR and CAEP SSR, the EPP may submit formal, supplementary documents that provide additional information, evidence, or clarification regarding specific issues identified during the accreditation review process. The Addendums are attached to the original reports without changing the original content and become a formal part of the overall documentation.</p> <p>The initial report of the state off-site review is emailed to the EPP 30 days before the site visit. The EPP may submit an addendum to the preliminary report within three weeks prior to the onsite visit.</p> <p>The CAEP team will provide a Formative Feedback Report (FFR) to the EPP 5 months prior to the site visit. The EPP will submit a Self Study Addendum (Addendum) to CAEP 60 days after the receipt of the FFR.</p> |
| <b>E. On-Site Reviews</b>           | <p>A 2-3 day on-site review for EPP accreditation is a mandatory, in-person (or virtual) evaluation conducted every seven years by a joint team representing the BPE and the OPI and CAEP. This review verifies the accuracy of the state ISSR and CAEP SSR and evaluates evidence of program quality, continuous improvement, and candidate performance.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>F. Final Conference</b>          | <p>The CAEP Site Team Lead and the state team chair conduct a final conference with the EPP and institution representatives at the end of the site visit.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>VI. After the On-Site Review</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>G. State Final Report</b>        | <p>The state final report is compiled by the team chair person in consultation with the state coordinator.</p> <p>The standard ratings are completed and the state final report is drafted within one month following the on-site visit.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>H. CAEP Final Report</b>         | <p>The CAEP Site Review/Final Report is compiled by the CAEP team and provided to the EPP one month after the site visit.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>I. State Rejoinder</b>           | <p>The EPP may submit an optional written response to the state report concerning errors or omissions within 30 days after the report is received and before it is submitted to the BPE for action. This response allows an EPP to state whether or not they agree with the evaluation team's findings; however, an EPP cannot include new and/or additional evidence with the rejoinder.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| Category                                      | Procedure                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>J. CAEP Rejoinder</b>                      | <p>The EPP may submit an optional written response to the CAEP report concerning errors or omissions within 30 days after receiving the CAEP Site Review/Final Report. The EPP cannot include new and/or additional evidence with the rejoinder.</p> <p>The CAEP Site Team Lead may submit a response to the CAEP Accreditation Council regarding the rejoinder. The CAEP Site Team Lead has 30 days to do so.</p>                                                                                                  |
| <b>K. CAEP Accreditation Council Decision</b> | <p>The CAEP Accreditation Council reviews all materials and recommendations of the CAEP site review team and makes final decisions regarding CAEP accreditation status, areas for improvement and/or stipulations, and standards met or unmet.</p> <p>The CAEP Accreditation Council meets the semester after the site visit (Fall or Spring meetings) to make its determinations.</p> <p>Upon its decision, the CAEP Accreditation Council notifies the state for use in the final state/CAEP combined report.</p> |
| <b>L. Final Joint Accreditation Report</b>    | <p>Following CAEP Accreditation Council determination, the state will combine the CAEP/State report to create the Final Joint Accreditation Report.</p>                                                                                                                                                                                                                                                                                                                                                             |
| <b>M. Action on Final Reports</b>             | <p>The state and CAEP final reports are submitted to the BPE as an informational item, allowing the EPP to be present for discussion. The BPE will take action on the determination of the EPP's accreditation status at the next meeting. The determination will then be reported by the OPI to the EPP.</p>                                                                                                                                                                                                       |
| <b>VII. Annual Reviews</b>                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>N. Regional Accreditation</b>              | <p>EPP's shall maintain institutional accreditation to continue state accreditation.</p>                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>O. Annual Reports</b>                      | <p>EPP's provide information to OPI as part of the requested Annual Report for the BPE.</p> <p>EPP's provide a yearly update submitted to CAEP, in which the EPP provides a summary of: (1) provider information; (2) progress on removing any areas for improvement/stipulations; (3) substantive changes; (4) links to candidate performance data on its website; (5) eight annual measures of program outcomes and impact; and (6) pathway specific progress, as requested.</p>                                  |



## Joint CAEP/State Review Accreditation Cycle - Timeline

| Task                                                          | Date                                    | Who?                          |
|---------------------------------------------------------------|-----------------------------------------|-------------------------------|
| EPP and CAEP schedule site visit                              | 18 months prior to site review          | EPP and CAEP                  |
| EPP submit CAEP self-study report                             | 9 months prior to site review           | EPP                           |
| CAEP Evaluation Team Assigned (State representative included) | 9 months prior to site review           | CAEP                          |
| State ISSRs templates sent to EPP (Endorsements ONLY)         | 8 months prior to site review           | OPI                           |
| EPP Training/State Evaluation Team Formed                     | 6 months prior to site review           | OPI                           |
| EPP receives CAEP formative feedback report                   | 5 months prior to site review           | CAEP                          |
| Complete State ISSRs/ Review Team Training                    | 4 months prior to onsite review         | EPP to OPI<br>OPI/Review Team |
| EPP submits CAEP self study addendum                          | 60 days after formative feedback report | EPP to CAEP                   |
| State Off-site Review (Evaluation of ISSRs)                   | 14 weeks prior to onsite review         | OPI/ Review Team              |
| Preliminary Draft State Accreditation Report                  | 6 weeks prior to onsite review          | OPI                           |
| State Addendum (Endorsements ONLY)                            | 3 weeks prior to onsite review          | EPP to OPI                    |
| CAEP and State Joint Site Review                              | 2-3 days virtual site visit             | EPP/CAEP/OPI                  |
| Final State Accreditation Report                              | 1 month after state site review         | OPI                           |
| CAEP Site Review Report                                       | 1 month after site review               | CAEP                          |
| EPP submits rejoinder to CAEP                                 | 1 month after CAEP site review          | EPP to CAEP                   |

|                                                                           |                                                                                    |                       |
|---------------------------------------------------------------------------|------------------------------------------------------------------------------------|-----------------------|
| <b>(optional)</b>                                                         | <b>report</b>                                                                      |                       |
| <b>EPP submits rejoinder to State (optional)</b>                          | <b>3 weeks after final report</b>                                                  | <b>EPP to OPI</b>     |
| <b>CAEP lead submits rejoinder response to CAEP accreditation council</b> | <b>1 month after rejoinder</b>                                                     | <b>CAEP</b>           |
| <b>CAEP Accreditation Council Decision</b>                                | <b>Either fall or spring following the site review</b>                             | <b>CAEP</b>           |
| <b>CAEP/State Combined Report</b>                                         | <b>Following CAEP Accreditation Council determination (Spring or Fall meeting)</b> | <b>OPI</b>            |
| <b>Final Joint Accreditation Report</b>                                   | <b>3 weeks after CAEP Determination</b>                                            | <b>OPI</b>            |
| <b>Information Item for BPE</b>                                           | <b>1st available BPE meeting following report/rejoinder</b>                        | <b>OPI/EPP to BPE</b> |
| <b>Action Item for BPE</b>                                                | <b>Consecutive BPE Meeting following the info. item.</b>                           | <b>BPE</b>            |

## Section V: Accreditation Resources

### A: Annual Report

#### Approved Programs Template

THE UNIVERSITY OF MONTANA- COLLEGE OF EDUCATION

|                      |                                            |                    |                           |
|----------------------|--------------------------------------------|--------------------|---------------------------|
| Mailing Address      | 32 Campus Drive<br>Missoula, MT 59812      |                    |                           |
| Website Address      | www.umt.edu                                |                    |                           |
| Dean                 | Daniel Lee, Ed.D.                          |                    |                           |
| Email Address        | dan.lee@umontana.edu                       |                    |                           |
| Licensure Official   | Kristine Steinberg                         |                    |                           |
| Email Address        | kristine.steinberg@mso.umt.edu             |                    |                           |
| Telephone            | (406) 243-2121                             |                    |                           |
|                      |                                            |                    |                           |
| Accreditation Status | Regular Accreditation                      | Accrediting Entity | Board of Public Education |
| BPE Site Review      | April 2022: Joint Review with CAEP and BPE | Required Action    | None                      |

| Program/ Title     | Undergrad    | Graduate | Date of Initial Approval | YES if still approved or Date Discontinued | Month/ Year of Site Review |
|--------------------|--------------|----------|--------------------------|--------------------------------------------|----------------------------|
| Art K-12           | Major        |          | 1977                     | Major YES<br>Graduate 1982, Minor 1996     | April 2022                 |
| Biology            | Major/ Minor | Graduate | 1977                     | Major/ Minor YES<br>Graduate 1982          | April 2022                 |
| Business Education | Major/ Minor | Graduate | 1977                     | Major/ Minor 2018<br>Graduate 1982         |                            |

## Annual Educator Preparation Program Report



# 2025 Annual Educator Preparation Program Report

Thank you for taking the time to complete this form. The Annual Accreditation Report is used to monitor and communicate the EPP's continued compliance to Montana's accreditation standards. The reported areas are as follows:

- The accreditation review schedule for the ten educator preparation programs
- The accreditation status of the EPPs, including the corresponding regional and national accreditation agencies, the initial and expiration dates of all accredited programs
- The endorsement areas offered at the EPPs
- Information demonstrating the EPP's progress and efforts in addressing Areas for Improvement (AFIs) and/or Stipulations from prior accreditation decisions
- Data on enrollment, number of completers, and completers by subject area from the EPPs

The information provided through this form will be used in conjunction with Title II information for the Board of Public Education's November 2025 meeting. Please take the time to ensure documents and submissions are updated with current information. **The form must be completed by October 31st, 2025.**



## B: Good Cause Extension

State (Medialen) Superintendent  
P.O. Box 202501  
 Helena, MT 59620-3501



Phone: (406) 444-3500  
dpi.wt.gov

Date Received by MT DPI:  
Form GCERF (2-2025)

### Good Cause Extension Request Form

|                                                                                                                       |                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| Complete form along with:<br>EPP Rationale: A formal letter from EPP leadership explaining the basis for the request. |                                                                                        |
| Submit documents via email to: <a href="mailto:crystal.andrews@mt.gov">crystal.andrews@mt.gov</a> .                   |                                                                                        |
| Educator Preparation Program: _____                                                                                   |                                                                                        |
| Requested By (Name and Title): _____                                                                                  | Contact Information (email): _____                                                     |
| Scheduled Visit Semester: _____                                                                                       | Scheduled Visit Type (e.g. Continued, First): _____                                    |
| Requested New Visit Semester: _____                                                                                   | Requested Length of Extension:<br>____ one semester    ____ one-year    ____ two years |

#### Basis for Requesting a Good Cause Extension\*:

- ☐ State or federal standards or legislation requiring significant programmatic change.  
☐ Substantive changes—[CAEP Accreditation Policy V.4.01: Substantive Change](#) (pg. 55).  
☐ Other extenuating circumstances such as, Act of God, natural disaster, or civil unrest.

The Montana Board of Public Education and State Superintendent of Public Instruction maintain a 7-year accreditation cycle. The semester of the visit following a rescheduled visit will be based on the original scheduled visit, e.g., fall of 2025 may be the rescheduled visit request; rescheduled visit will occur during the fall of 2026. The next site accreditation visit would occur seven years from the original fall of 2025 schedule, which would be fall of 2030.

*\*The State Superintendent of Public Instruction reserves the right to approve or deny requests for Good Cause Extension and reserves the right to adjust the length of the extension based on the nature of the request. The EPP must provide sufficient justification to demonstrate need for an extension.*

### C: State On Site Visit Agenda EXAMPLE

| College<br>Accreditation State Site Visit<br>Date                                        |                                                                                                     |                                   |
|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-----------------------------------|
| GENERAL INFO                                                                             |                                                                                                     |                                   |
| All meetings will occur in the following rooms:<br>Site Team Work Room: Interview Rooms: |                                                                                                     |                                   |
| Leadership Team                                                                          | Primary Site Contact:                                                                               |                                   |
| IT Support                                                                               | Help Desk:<br>On-Call:                                                                              |                                   |
| Date                                                                                     |                                                                                                     |                                   |
| 9:30                                                                                     | Site Team arrives                                                                                   |                                   |
| 9:45                                                                                     | Tech & WIFI Check<br>Location:                                                                      |                                   |
| 10:00                                                                                    | College Leadership Team meets with Site Team upon arrival<br>Site Team Schedule Review<br>Location: |                                   |
| 10:30- 11:00                                                                             | Orientation and Overview of College of Education<br>Location:                                       |                                   |
| 11:15 - 12:00                                                                            | Interview: Standard<br>Location:                                                                    | Interview: Standard<br>Location:  |
| 12:00- 1:00                                                                              | Lunch                                                                                               |                                   |
| 1:00 - 2:00                                                                              | Interview: Standard<br>Location:                                                                    | Interviews: Standard<br>Location: |
| 2:15 - 3:00                                                                              | Interview:<br>Location:                                                                             | Interview:<br>Location:           |
| 3:00- 3:15                                                                               | Break                                                                                               |                                   |
| 3:15- 4:00                                                                               | Interview:<br>Location:                                                                             | Interview:<br>Location:           |
| 4:15 - 5:00                                                                              | College Leadership Team Meeting with Site Team<br>Progress of the visit and data needs<br>Location: |                                   |

## **D: State Program Report Narrative SAMPLE**

### **Number and Name of Standard:**

### **Validating Statement:**

- *Supporting materials were reviewed and interviews conducted with students and faculty (names, title, department). Brief description of what was observed with support documentation.*

### **Sources of Evidence:**

- *Evidence gathered from general bulletin and catalog, course, syllabi, candidate portfolio, interviews with department faculty, students, cooperating teachers and others.*

### **Assessment Aligned to Standards:**

- *Are the content topics in the assessments consistent with the standards?*
- *Do the assessments address the range of knowledge, skill, and dispositions that are delineated in the standard? Do the assessments address the majority of the standards content?*
- *Are the assessments congruent with the complexity, cognitive demands, and skill requirements described in the standards?*
- *Are scoring guides clear and are the levels of candidate proficiency distinct and appropriate?*

### **Evaluation:**

- *Most of the required courses and aligned assessments provided in the IR meet the standards. Upon further investigation, the reviewers found no evidence to support that substandards \_\_\_\_\_ is met.*

### **Commendations:**

### **Improvements:**

### **Accreditation Recommendation:**

- *Meets Standard*
- *Meets with Notation*
- *Area for Improvement*
- *Stipulation*

## E: State Institutional Self-Study Report (ISSRs) EXAMPLE



### Institutional Self-Study Report

| 10.58.502 AGRICULTURAL EDUCATION                                                                                                                                                                                                                                                                          | TO BE COMPLETED BY THE INSTITUTION |                      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|----------------------|
|                                                                                                                                                                                                                                                                                                           | Courses and Outcomes               | Evidence/Assessments |
| (1) The program requires that candidates have one year (minimum 500 hours) of practical farm or agricultural-related experience within five years prior to completion of the program and that successful candidates:                                                                                      |                                    |                      |
| (a) demonstrate essential skills and knowledge including the scientific/technical, safety, and career information in the areas of:                                                                                                                                                                        |                                    |                      |
| (i) agricultural, natural, and environmental resource science;                                                                                                                                                                                                                                            |                                    |                      |
| (ii) agricultural business management and entrepreneurship;                                                                                                                                                                                                                                               |                                    |                      |
| (iii) horticultural science;                                                                                                                                                                                                                                                                              |                                    |                      |
| (iv) animal science;                                                                                                                                                                                                                                                                                      |                                    |                      |
| (v) crop science;                                                                                                                                                                                                                                                                                         |                                    |                      |
| (vi) soil science;                                                                                                                                                                                                                                                                                        |                                    |                      |
| (vii) food science;                                                                                                                                                                                                                                                                                       |                                    |                      |
| (viii) agriculture mechanical technology;                                                                                                                                                                                                                                                                 |                                    |                      |
| (ix) biotechnology, and                                                                                                                                                                                                                                                                                   |                                    |                      |
| (x) technology applications in agriculture;                                                                                                                                                                                                                                                               |                                    |                      |
| (b) demonstrate a philosophy of career and technical education, which reflects the unique student/community and industry interaction and includes the biological, physical, and applied sciences, personal leadership, and school-to-career components of a comprehensive agricultural education program. |                                    |                      |

## **F. State Definitions of Ratings**

### **Met:**

Regular accreditation for a period of seven years.

### **Met with Notation:**

Regular accreditation with minor deviations with most of the components of a standard met. This could involve incomplete items on the Institutional Report or clarification/corrections needed. As those items are rectified, the recommendation to the BPE will reflect the current and corrected status.

### **Area for Improvement (AFI):**

Standard is met with weakness. The site review team identified a weakness in the evidence for a standard or component. Area for Improvement should be remediated by the next accreditation cycle, and progress toward improvement is reported annually through the annual report to the OPI/BPE. During the next accreditation review, the EPP must demonstrate that the AFIs have been corrected. If the AFIs have not been corrected, a stipulation may be cited in the same area.

### **Stipulation:**

A standard or component is not met. The site visiting team identified a deficiency related to one or more components or the BPE standard. A stipulation is of sufficient severity that a standard may be determined to be unmet. A stipulation must be addressed within two years to retain accreditation.



**ITEM 10**

**ACTION ON THE SITE VISIT AND STATE**  
**EXIT REPORT OF THE CARROLL**  
**COLLEGE EDUCATOR PREPARATION**  
**PROVIDER IN THE DEPARTMENT OF**  
**EDUCATION**

**Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Recommend Approval of the State Accreditation Program Report for Carroll College's Educator Preparation Program (EPP) in the College of Education.                                                                                                                                                                                                                                                                                                                                 |
| <b>Presenter</b>             | Crystal Andrews                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Position Title</b>        | Accreditation and Licensure Senior Manager<br>Office of Public Instruction                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Overview</b>              | <p>The State Superintendent of Public Instruction recommends approval of the 2026 State Program Report for Carroll College's EPP in the College of Education and Regular Accreditation status.</p> <p>The State Final Report is included in the BPE Agenda Packet, along with a rejoinder that was submitted by Carroll College.</p> <p>Dr. Joe Hebling, Chair of the Education Department, will be available to provide final comments and respond to questions from the BPE.</p> |
| <b>Requested Decision(s)</b> | Action Item                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Related Issue(s)</b>      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Recommendation(s)</b>     | Approve the State Program Report and Regular Accreditation Status for Carroll College's EPP in the College of Education, as recommended by State Superintendent Hedalen. Carroll College will be accredited through 2033.                                                                                                                                                                                                                                                          |





**March 27, 2026**

**TO:** Dr. Joe Hebling  
Chair– Education Department  
College of Education  
Carroll College

**FROM:** Crystal Andrews  
Senior Manager  
Accreditation Unit  
Montana Office of Public Instruction

**SUBJECT:** **Final** State Accreditation Program Report 2026

From February 24-25, 2026, the State Accreditation review of the Educator Preparation Program (EPP) in the College of Education occurred onsite at Carroll College. This site review was conducted by the Montana Office of the Public Instruction (OPI). Prior to the site visit, a cadre of qualified educators including teachers, college professors, administrators and content specialists reviewed the Institutional Reports provided by Carroll College for the endorsement areas. During the onsite review, the OPI team reviewed submitted documents and conducted focus groups regarding the initial standards, ARM 10.58.311 to 10.58.315.

The purpose of the review was to verify that the Institutional Report of the EPP meets the requirements of the Montana Professional Educator Preparation Program Standards (PEPPS) for both initial program and endorsement standards. The state report provides the results of the endorsement review relating to the program endorsement areas as outlined in [ARM 10.58](#):

- 10.58.311 Initial Content and Pedagogical Knowledge
- 10.58.312 Initial Clinical Partnerships and Practices
- 10.58.313 Initial Candidate Quality Recruitment, Progression, and Support
- 10.58.314 Initial Program Impact
- 10.58.315 Initial Provider Quality Assurance and Continuous Improvement
- 10.58.501 Teaching Standards
- 10.58.509 English/ Language Arts
- 10.58.510 Special Education
- 10.58.518 Mathematics
- 10.58.521 Reading Specialist
- 10.58.522 Science
- 10.58.523 Social Studies
- 10.58.532 Elementary

The Final State Accreditation Program Report 2026 is attached.

The EPP may submit an optional rejoinder to the report concerning errors or omissions within 30 days after the report is received and before it is submitted to the BPE for action. This written response allows the EPP to state whether or not they agree with the evaluation team's findings; however, the EPP cannot include new and/or additional evidence with the rejoinder. The rejoinder should be submitted to Crystal Andrews at the OPI by April 17, 2026.

Below are the next steps and the projected timeline for the Board of Public Education (BPE) approval process.

- Carroll College may submit a rejoinder to OPI by April 17, 2026.
- Upon the recommendation of the State Superintendent, the Final State Accreditation Program Report will be presented to the BPE as an information item at the May 2026 (tentative) BPE meeting.
- The BPE will take action on the Final State Accreditation Program Report and the Accreditation/Approval status of the EPP in the College of Education at Carroll College at the July 2026 (tentative) BPE meeting.

For more information, contact Crystal Andrews by telephone at 406-593-8278 or by email at [Crystal.Andrews@mt.gov](mailto:Crystal.Andrews@mt.gov).

cc: Jamie Corley, Accreditation Specialist, Montana Office of Public Instruction  
Julie Murgel, Chief Program Officer, Montana Office of Public Instruction

## DEFINITIONS WHICH PERTAIN TO THIS REPORT

**Standard is met (Met):** Regular accreditation for a period of seven years.

**Standard is met with notation (Met with Notation):** Regular accreditation with minor deviations with most of the components of a standard met. This could involve incomplete items on the Institutional Report or clarification/corrections needed. As those items are rectified, the recommendation to the BPE will reflect the current and corrected status.

**Area for Improvement (AFI):** Standard is met with weakness. The site review team identified a weakness in the evidence for a standard or component. Area for Improvement should be remediated by the next accreditation cycle, and progress toward improvement is reported annually through the annual report to the OPI/BPE. During the next accreditation review, the EPP must demonstrate that the AFIs have been corrected. If the AFIs have not been corrected, a stipulation may be cited in the same area.

**Stipulation:** A standard or component is not met. The site visiting team identified a deficiency related to one or more components or the BPE standard. A stipulation is of sufficient severity that a standard may be determined to be unmet. A stipulation must be addressed within two years to retain accreditation.



### Initial Program Standards

| ARM       | TITLE                                                         | STATUS            |
|-----------|---------------------------------------------------------------|-------------------|
| 10.58.311 | Initial Content and Pedagogical Knowledge                     | Met with Notation |
| 10.58.312 | Initial Clinical Partnerships and Practice                    | Met               |
| 10.58.313 | Initial Candidate Quality, Recruitment, and Selectivity       | Met               |
| 10.58.314 | Initial Program Impact                                        | Met with Notation |
| 10.58.315 | Initial Provider Quality Assurance and Continuous Improvement | Met with Notation |

### Teaching Program Standards

| ARM       | TITLE                                                              | STATUS                   |
|-----------|--------------------------------------------------------------------|--------------------------|
| 10.58.501 | <b>Teaching Standards</b><br>Elementary<br>Secondary               | Met<br>Met with Notation |
| 10.58.509 | <b>English/Language Arts</b><br>Undergraduate                      | Met                      |
| 10.58.510 | <b>Special Education P-12</b><br>Undergraduate                     | Met                      |
| 10.58.518 | <b>Mathematics</b><br>Undergraduate                                | Met with Notation        |
| 10.58.521 | <b>Reading Specialist K-12</b><br>Undergraduate                    | Met                      |
| 10.58.522 | <b>Science</b> (Broadfield Science)<br>Undergraduate               | Met with Notation        |
| 10.58.523 | <b>Social Studies</b> (Broadfield Social Studies)<br>Undergraduate | Met with Notation        |
| 10.58.532 | <b>Elementary</b><br>Undergraduate                                 | Met                      |

### OVERALL COMMENDATIONS

The Educator Preparation Program (EPP) in the College of Education at Carroll College is commended for its robust curriculum and its success in preparing candidates for the complexities of the modern classroom. Central to this success is the cultivation of strong student and faculty relationships, which provide a foundation of mentorship and professional support throughout the candidate's journey. These internal dynamics are further strengthened by strategic partnerships with stakeholders, including the Teacher Advisory Panel and P-12 partners, ensuring that the program remains deeply rooted in current clinical practice and responsive to the needs of the community.

The Special Education program serves as a benchmark for excellence within the Teacher Education Program (TEP). Its components provide a foundational, research-based training model that ensures graduates are not only compliant with state regulations but are passionate, prepared, and effective practitioners ready to make an immediate positive impact on students with exceptional needs.

Carroll College demonstrates exemplary dedication to producing high-quality educators. As we conclude this accreditation review, the results reaffirm the EPP's unwavering commitment to academic excellence and student success. This process has served as a valuable tool, allowing the EPP to celebrate institutional strengths while identifying clear pathways for growth.

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.311 Initial Content and Pedagogical Knowledge**

**Summary of findings:** The evidence for meeting these standards includes various assessment methods such as MACK scores, Praxis exams, GPA, coursework (including a core technology course), key assessments (like the Teaching Work Sample or TWS), clinical evaluations, special education preparation, and capstone evidence.

**Evidence consistent with meeting the standard:** Carroll's evidence confirms that the program meets the requirements for ARM 10.58.311 (1)(a-h), particularly regarding candidate content knowledge, pedagogy, and alignment with Montana teaching standards (learner development, environment, and instructional design). Evidence shows that candidates can successfully apply discipline-specific concepts to advance P-12 student learning. The curriculum demonstrates a strong focus on planning and varied assessment, with the technology course providing relevant training for instructional design. Despite these strengths, certain aspects of the program warrant additional support.

**Evidence inconsistent with meeting the standard:** Onsite evidence indicates that secondary programs must better bridge content knowledge with research-based theory. Relying solely on elementary methods for secondary candidates creates a readiness gap, as grades 6-12 require specialized pedagogy, adolescent psychology, and advanced classroom management. Graduates with only elementary training often struggle to adapt to the subject-specific, rigorous environment of secondary education.

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:**

None

**Recommendation:** Met with Notation

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.312 Initial Clinical Partnerships and Practice**

**Summary of findings:** The program was found to have met the standard in all sub-clauses reviewed under 10.58.312.

**Evidence consistent with meeting the standard:** The evidence provided supports compliance with the substandards: effective partnerships and practices, co-constructed, mutually beneficial arrangements, high-quality clinical educators, and design and implementation of clinical practices. Candidates participate in effective community partnerships and supervised clinical practice, demonstrating a focus on developing knowledge, skills, and professional dispositions necessary for positive impact on P-12 student learning. The college teacher preparation program demonstrates partnerships with a variety of PK-12 and community organizations that serve different forms, participants, and functions in clinical preparation. Expectations for candidate entry, preparation, and exit are outlined in the MOU and student teaching handbook. Theory and practice are linked through practicums embedded within methods or foundations courses. Accountability for candidate outcomes is shared via ongoing communication among principals, cooperating teachers, supervisors, and the Field Placement Coordinator. Opportunities are routinely provided for candidates to select their student teaching placement in their district/school of choice, honoring local recruitment initiatives when possible. Co-selection, preparation, and evaluation processes ensure candidates are supported by high-quality clinical educators who positively influence candidate development and P-12 student learning. Evidence confirms that clinical experiences, utilizing various modalities, ensure candidates demonstrate developing effectiveness and measurable positive impact on P-12 student learning throughout the clinical sequence. A way to strengthen the program even further is by actively diversifying opportunities to include rural, high-need, or varied settings.

**Evidence inconsistent with meeting the standard:** None

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:**

None

**Recommendation:** Met

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.313 Initial Candidate Quality, Recruitment, and Selectivity**

**Summary of findings:** The program is found to have met the standard and most of the subsections in ARM 10.58.313. One substandard requires additional evidence- 10.58.313(1)(g).

**Evidence consistent with meeting the standard:** Evidence for teacher candidate quality is grounded in a variety of measures, including the InTasc Model Core Teaching Standards, The Montana Code of Ethics, The Danielson Framework, Research on Dispositions in Teacher Education, and Crosswalks with Peer Institutions' instruments. Additionally, Carroll College Teacher Prep Program has strong evidence of supporting teacher candidates through advising, building relationships, along with consistent and structured monitoring and reviews. This evidence provides assurance that teacher candidates progress effectively through the preparation program and are prepared as they head into the teaching profession.

Onsite evaluations indicate a need to integrate foundational coursework throughout the curriculum to ensure the longitudinal reinforcement of program requirements, communication standards, and student expectations. Foundations courses should be designed to provide transparent, intentional, and timely guidance, serving as a consistent touchstone for students as they progress through the entire program. Utilizing full-time faculty for these core courses will likely enhance program-wide consistency, provided these instructors maintain active links to current P-12 classroom challenges to ensure pedagogical relevance. Finally, the program must implement an accessible, transparent, and structured grievance process to better support candidate concerns.

**Evidence inconsistent with meeting the standard:** None

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:**

None

**Recommendation:** Met



**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.314 Initial Program Impact**

**Summary of findings:** Onsite evaluations confirm that teacher candidates are well-prepared for classroom environments, demonstrating the program's effectiveness in practical application. To further strengthen these outcomes, the program is currently engaged in a continuous analysis of completer performance and stakeholder satisfaction to ensure long-term impact and alignment with field expectations. However, a reliance on insufficient employer survey data—due to low response rates and a lack of follow-up—limits the ability to fully demonstrate employer satisfaction.

**Evidence consistent with meeting the standard:** The program evaluates the transition from candidate to practitioner through a multi-channel feedback system designed to capture diverse performance metrics. This framework integrates qualitative insights from the Teacher Advisory Panel (TAP) with exit assessments that provide immediate projections of professional performance. Additionally, employer and completer surveys are utilized to document long-term instructional capacity.

**Evidence inconsistent with meeting the standard:** There is a need to improve Employer Survey response rates to mitigate bias, capture long-term trends, and ensure the program meets evolving district expectations.

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:**

None

**Recommendation:** Met with Notation

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.315 Initial Provider Quality Assurance and Continuous Improvement**

**Summary of findings:** Evidence provided shows that Carroll College's teacher preparation program now meets quality assurance standards, improving from a previous "area for improvement" to "met with notation". Onsite evidence confirmed the program has established a regular data review cycle and faculty response system.

**Evidence consistent with meeting the standard:** The program has established a robust, standards-aligned data system (ARM 10.58.315) utilizing varied assessments, including key assessments, Praxis, and survey data to shift from individual student focus to system-level improvements. While defining this system is a major achievement, future focus is needed on continuous monitoring.

**Evidence inconsistent with meeting the standard:** The program should establish a more formalized system for sharing performance data and program improvements with teacher candidates. While onsite evaluations confirm that candidates are well-prepared for the classroom, providing students with transparent access to assessment outcomes and program-wide data will foster a deeper understanding of professional expectations and their own developmental milestones. This transparency ensures that students are not merely subjects of evaluation but active participants in the program's quality assurance processes.

Furthermore, the program must refine its continuous improvement framework by developing a systematic approach to data monitoring. Beyond the current multi-channel feedback system, there is a need for a consistent, longitudinal cycle of analysis that translates raw data into actionable curricular enhancements. Strengthening this piece involves creating a regular review schedule where data from the Teacher Advisory Panel, exit assessments, and employer surveys are synthesized to identify trends. By closing this feedback loop, the program can more effectively monitor the impact of foundational coursework and faculty alignment on long-term candidate success.

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:**

None

**Recommendation:** Met with Notation

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Number and Name of Standard:** 10.58.501 Teaching Standards - Elementary

**Validating Statement:** The program provides comprehensive experiences that meet the standards outlined in 10.58.501.

**Sources of Evidence:** Course syllabi, assignments, activities, and assessments

**Assessment Aligned to Standard:** There is a solid connection between coursework that is clearly aligned to the standards meeting the intent, dispositions, and proficiencies in each.

**Evaluation:** The Carroll College Teacher Education Program (TEP) is rigorously designed, offering diverse clinical and classroom experiences that facilitate the professional growth of elementary education candidates. The curriculum follows a logical sequence that ensures comprehensive alignment with the standards established in ARM 10.58.501. Furthermore, evidence from course syllabi demonstrates a deliberate integration of these standards into the program's core learning outcomes.

**Commendation:** The program was thoughtful about developing programs of study that would meet the standards across the continuum of the program culminating in practice during student teaching. The evidence in each standard showed the program intentionally addressed scope of the standard to prepare proficient teachers with a diverse set of pedagogical skills and competencies that are easily transferable to the classroom to impact student growth. Overall, the program has all the necessary elements in place to develop quality educators.

**Improvements:** While all the standards for teaching were met, one area where the program may direct future attention is that of having a more delineated focus on ELLs in the area of instruction, perspectives on culture and language, and how those elements interact to influence classroom engagement and growth.

**Accreditation Recommendation:** Met

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Number and Name of Standard: 10.58.501 Teaching Standards - Secondary**

**Validating Statement:** Carroll College has provided evidence demonstrating that secondary education candidates receive multiple opportunities to engage with and acquire the skills and competencies outlined in Standard 10.58.501. Through a diverse array of learning opportunities integrated across secondary education program courses, candidates are equipped to acquire the 12 teaching standards encompassing: learner development, learning differences and diversity, learning environment, content knowledge personalization and accessibility, content application, assessment, planning and implementation, instructional strategies, professional learning and ethical practices, family and community engagement, and Indian Education for All. Candidates cultivate these teaching competencies through a comprehensive sequence of coursework, field experiences, and student teaching.

**Sources of Evidence:** Documentation supporting Standard 10.58.501 comprised three principal documents: the Institutional Self-Study Report (ISSR), the Program Level Rubric Document, and the Academic Catalog for the 2025-2026 Academic Year. Supplemental evidence included syllabi for a variety of courses, such as: Introduction to Exceptional Children, Foundations of Education, Measurement and Assessment in Education, Content Area Reading and Secondary Methods, Developmental Psychology, Collaboration and Conferencing, Middle School Teaching, Child and Adolescent Psychology, Diversity Field Experience, Introduction to Native American Studies, Educational Psychology, and Education Seminar.

**Assessment Aligned to Standard:** The Institutional Self-Study Report (ISSR) delineates the methodology by which the Carroll College Teacher Education Program (TEP) addresses the Montana Teaching Standards (10.58.501). The ISSR demonstrates that the Carroll College TEP is fundamentally rooted in a liberal arts foundation and a Conceptual Framework (2025), which serves to govern the curriculum, instruction, and assessment. It establishes an alignment between the Standards outlined ARM 10.58.501 and the InTASC Core Teaching Standards. The ISSR enumerates common program assessments, including the Teacher Work Sample, Field Evaluations (which assess Dispositions and Danielson Framework competencies), and course-based key assessments. A quality assurance system is employed to collect and analyze data, regarding candidates acquisition of the 12 teaching standards.

The Program-level Rubric Template for the TEP is congruent with Standard 10.58.501. These rubrics articulate Program Learning Goals (PLGs) in correspondence with the 12 teaching standards. Each PLG is further disaggregated into specific Program Learning Objectives (PLOs) and is assessed across four distinct achievement levels: Beginning (1), Developing (2), Proficient (3), and Advanced (4). The rubrics also include concrete examples of how a candidate demonstrates competency with the standard.

The Academic Catalog for the 2025-2026 academic year incorporates information detailing the TEP's objective: to support students in cultivating teaching competencies and evolving into educational professionals adept at responding to the diverse needs of individual students. The Catalog specifies that candidates are mandated to demonstrate proficiency in the Montana 12 teaching standards. Furthermore, the catalog delineates program requirements and progression benchmarks, asserting that students must successfully satisfy a series of these benchmarks to maintain enrollment in the program and ultimately be eligible for licensure recommendation.

**Evaluation:** The Carroll College TEP is well-structured, providing a range of experiences that are conducive to candidates developing into effective secondary educators. The program exhibits an effective overall sequence of courses that comprehensively addresses the teaching standards outlined in ARM 10.58.501. Further analysis of the course syllabi revealed intentional integration of the teaching standards into the defined learning outcomes.

**Commendations:** Carroll College effectively addresses the teaching standards within its secondary education program, as evidenced by its broad spectrum of comprehensive learning experiences. This alignment is clearly demonstrated through the intentional structure of the Conceptual Framework, the integration of Rubrics with the Program Learning Goals and Objectives, and the Course Work, all of which are directly correlated with the teaching standards. Candidates are afforded frequent and varied opportunities to design meaningful learning experiences and environments for secondary students, participate in field experiences that allow for the assessment of lesson and activity effectiveness, and engage in deliberate self-reflection concerning their professional growth and dispositions. The documentation detailing the mapping of course work to the 12 teaching standards, was particularly thorough and well substantiated.

**Improvements:** Evidence shows that the Carroll TEP is doing an excellent job at preparing candidates with the 12 teaching standards outlined in ARM 10.58.501. However, three key areas could be enhanced to further strengthen secondary educators' ability to effectively personalize and deliver instruction:

- Provide candidates with explicit opportunities to incorporate modern digital learning tools and Artificial Intelligence (AI) into their pedagogical practices. This will enable educators to strategically apply technology to personalize learning experiences.
- Ensure practical applications of strategies that support effective instruction for English Language Learners (ELLs) to amplify content personalization and accessibility.
- While candidates demonstrate an understanding of Indian Education for All (IEFA) essential concepts, increased practice in embedding IEFA principles into lesson plans specific to their content area of expertise is recommended.

**Accreditation Recommendation:** Met



**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Number and Name of Standard: 10.58.509 English/Language Arts**

**Validating Statement:** A variety of courses are used throughout the program to ensure that teacher candidates have numerous opportunities to enhance their pedagogical, theoretical, and instructional knowledge in English Language Arts instruction. Candidates have the opportunity to take upper-level English courses to expand their own knowledge of genres, audiences, reading, and writing processes across content areas. Additionally, there is opportunity for candidates to reflect on their own teaching practices through student teaching, seminars, and collaborative work with peers and mentor teachers.

**Sources of Evidence:** Documentation to support 10.58.509 English Language Arts included several sources of evidence, including the Institutional Self-Study Report (ISSR), course catalogs from the 2025-2026 school year, course objectives, and course outcomes. Specific syllabi from the following courses have also been provided and include the following courses: Teaching English on the Secondary Level, Literary Studies, Young Adult Literature, Content Area Reading and Secondary Methods, Literary Theory and Criticism, Native American Authors, Literary Studies, History of the English Language, and Introduction to Creative Writing.

**Assessment Aligned to Standard:** The Institutional Self-Study Report (ISSR) provides evidence of the methodology that Carroll College Teacher Education Program (TEP) uses to address the Montana Teaching Standards - English Language Arts (10.58.509). The ISSR demonstrates that the Carroll College TEP adheres to strict standards for admission and recommendation for licensure, including ensuring teacher candidates meet minimum expectations on course grades, Praxis tests, and the Montana Assessment of Content Knowledge (MACK). The ISSR includes opportunities for teacher candidates to organize literary festivals, planning units of study, and field experiences in classrooms.

The syllabi provided also include specific Montana Teaching Standards that support candidates in growing competencies and becoming adept professional educators, alongside their work in English Language Arts teaching and learning. The syllabi provide evidence of assessment and benchmarks of candidate's abilities to plan, implement, and assess English language arts and literacy instruction.

**Evaluation:** The Carroll College TEP is well-organized and provides a range of experiences for teacher candidates to develop into effective English teachers. The program provides an effective combination of coursework to enhance candidates' understanding of English pedagogy, theory,

and how to design effective instruction for students. The coursework comprehensively addresses the teaching standards in ARM 10.58.509.

**Commendations:** Carroll College effectively addresses the English Language Arts teaching standards within its TEP. There is strong evidence of teacher candidates having the opportunity to not only develop their own proficiency in reading and writing across genres, but to also plan, implement, and reflect upon how that knowledge can assist them in teaching their students in English language arts. By providing a variety of options for students to take upper-level coursework in English, and pair them with field experiences, as in ED 318, for example, candidates are able to make a connection between their learning and the practical application of teaching. There is strong evidence of candidates collaborating with colleagues as well as having the opportunity to learn how to communicate effectively with a variety of audiences including parents, administrators, and the community. Additionally, there is clear evidence of supporting teacher candidates in successful classroom management strategies to increase engagement and participation of their future students. Clear collaboration between departments at Carroll College offer a broad range of classes for candidates to deepen their pedagogical understandings of English language arts.

**Improvements:** The evidence shows that Carroll is preparing candidates well for their future roles in teaching English Language Arts. There are two areas, however, that could be enhanced to further strengthen candidate's preparation for teaching:

- The ELA standards mention “standards-based learning experiences” for all students. While there is an occasional mention of standards-aligned planning, provide students with explicit standards-based learning experiences themselves, so they can plan those same types of experiences for their students. Additionally, provide explicit instruction on standards-based grading so candidates can understand how to provide standards-based instruction and assessment within a grade-based system.
- While there is a stand-alone course on Native American authors, provide more integrated assignments throughout the TEP coursework. This will provide candidates the experience with thoughtful integration of works by/about Native American authors and perspectives, in order to integrate into their own instructional planning.

**Accreditation Recommendation:** Met

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Number and Name of Standard: 10.58.510 Special Education P-12**

**Validating Statement:** The Special Education P–12 program at Carroll College demonstrates alignment with ARM 10.58.510 through a comprehensive sequence of coursework, clinical experiences, and assessment practices designed to prepare candidates to effectively educate students with exceptionalities. The program integrates evidence-based instructional practices, legal and ethical foundations, collaborative skills, and progressively intensive field experiences to ensure candidates meet professional standards and are prepared for service in Montana schools.

**Sources of Evidence:** Sources of evidence include course syllabi, program descriptions, assessment rubrics, field experience evaluations, disposition assessments, practicum and student teaching documentation, and the Institutional Self-Study Report. Evidence demonstrates alignment between coursework outcomes and state standards across multiple courses including SPED 200, SPED 204, SPED 205, SPED 206, SPED 308, SPED 323, ED/SPED 324, and SPED 409.

**Assessment Aligned to Standard:** The program utilizes multiple measures to assess candidate knowledge, skills, and professional dispositions. Assessments include written assignments, case studies, lesson plans, diagnostic-based interventions, field experience evaluations, IEP development assignments, behavior intervention plans, and observation-based evaluations aligned to the Danielson Framework and program disposition levels. Clinical experiences progress from observation and limited practice to extended student teaching placements, allowing candidates to demonstrate competence across diverse educational settings.

Assessments are clearly embedded within coursework and clinical practice and are aligned to program outcomes and ARM 10.58.510 competencies, including instructional planning, assessment and data analysis, collaboration, legal compliance, and least restrictive environment decision-making.

**Evaluation:** The evidence provided demonstrates that the Special Education P–12 program at Carroll College exceeds the requirements of ARM 10.58.510. Coursework and field experiences are intentionally sequenced to build candidate competence over time, with multiple opportunities to demonstrate proficiency in assessment, instructional strategies, collaboration, and professional responsibilities.

Candidates are evaluated using both qualitative and quantitative measures, including rubrics, field evaluations, and performance-based assessments. While individual candidate performance data are documented within courses and field placements, the Institutional Self-Study emphasizes descriptive and rubric-based evaluation methods. Aggregated and disaggregated

candidate performance data are limited in the submitted materials; however, the overall structure of assessment and alignment to standards is clearly articulated and consistently implemented across the program.

**Commendations:**

- The program demonstrates a strong alignment between coursework, field experiences, and ARM 10.58.510 standards.
- Candidates participate in progressively intensive clinical experiences, culminating in extended student teaching placements that support readiness for licensure.
- Coursework emphasizes legal and ethical responsibilities, collaboration, and evidence-based instructional practices essential for special education professionals.
- Multiple assessment methods are used to evaluate candidate competencies across academic, behavioral, and functional domains.

**Improvements:**

- Consider providing aggregated and disaggregated candidate performance data across key assessments to strengthen program-level evaluation and continuous improvement efforts.

**Accreditation Recommendation:** Met

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Name and Number of Standard: 10.58.518 Mathematics**

**Validating Statement:** The institution provided an Institutional Self-Study Report. In the report, each component of Standard 10.58.518 was associated with a particular course in the degree program. For each of these courses, the institution also provided a location where evidence of inclusion of each component could be found in the accompanying documentation. This documentation primarily consisted of course syllabi.

**Sources of Evidence:** Course syllabi, assignments, projects, presentations, course descriptions in course catalog, candidate teaching handbook.

**Assessment Aligned to Standard:** Assessment of each component of the full standard was evaluated using the provided Institutional Self-Study Report (ISSR). Assessment decisions were made on the basis of inclusion or exclusion – that is, if the evidence pointed to in the ISSR demonstrated that the component of the standard was fully included in the degree program, then, the assessment of the program was determined to have met the standard (MET). Conversely, if the evidence pointed to in the ISSR demonstrated that the component of the standard was not fully included in the degree program, then, the assessment of the standard was identified as an area for improvement (AFI) or a stipulation (STIP). The distinction between AFI and STIP was made on the basis of whether or not the component was partially met (AFI) or missing (STIP).

**Evaluation:** The large majority of components of Standard 10.58.518 are met by the degree program. The development of content knowledge in mathematics is very strong. The program includes a number of rigorous, upper-division courses (e.g., Abstract Algebra, Real Analysis, Modern Geometry). Furthermore, there is evidence that candidates gain strong training and exposure to the modern mathematical pedagogy known as Inquiry Based Learning (IBL). At least 6 unique syllabi identify IBL as the chosen format for learning course content, so, candidates learn of this teaching technique by experiencing it firsthand as candidates in mathematics content courses. In regards to mathematical pedagogy, minimal evidence was provided to demonstrate implementation of standard 1.i.i, in particular how learners develop mathematical proficiency through the interdependent processes of integrating conceptual understanding, procedural fluency, strategic competence, adaptive reasoning, and productive disposition. The evidence provided indicates that candidate training in pedagogical understanding specific to mathematics is limited to the middle grades only in the course *MA301 – Teaching Math Content and Methods in Middle Grades*. While a high school methods of teaching mathematics course is included in the degree plan (e.g., *ED318 – Content Area Reading and Secondary Methods*), a close reading of the syllabi indicates that the course is not tailored to the learning of mathematical pedagogical knowledge, but rather seems more concerned with



how literacy develops across the various content area domains commonly taught in high school. There is concern that candidates in the program are not prepared as well to meet the demands of teaching high school mathematics, where candidate learning of algebra, function, proof-based geometry and comparative statistics develops quite differently than the more common topics of middle school such as ratio, proportion, rational number, measurement geometry and statistical measure.

**Commendation:** The program is particularly well-suited to training teachers in the teaching-and-learning of mathematical modeling. At least seven different courses ask candidates to engage in the process of mathematical modeling across a variety of mathematical content area contexts (e.g., calculus, statistics, numerical methods, optimization). All candidates in the program are required to take *MA321 – Math in the Mountains*. This unique course seeks to engage candidates in a semester-long quest to engage in a mathematical modeling problem that arrives at the classroom from an area business or manufacturing group. Candidates emerge from this program with a very good understanding of how mathematics and statistics can be applied to real-world problems to improve understanding and decision making.

**Improvements:** As noted above, the only area for improvement are standards 1.i.i and 1.i.vi. Both standards are meant to require that pedagogical knowledge *particular to mathematics* is part of candidates' preparation to teach grades 5-12 mathematics. While evidence points towards adequate pedagogical preparation in grades 5-8, there is less evidence that teacher candidates are as pedagogically prepared to teach mathematics in grades 9-12. For instance, this reviewer finds little evidence that candidates study the State of Montana Content Standards in grades 9-12 and there is little evidence that candidates learn anything in particular about how, for example, high school candidates learn algebra. This area for improvement should be addressed to ensure that candidates are better prepared in this important area of the preparation of teachers.

**Accreditation Recommendation:** Met with Notation

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Name and Number of Standard: 10.58.521 Reading Specialist**

**Validating Statement:** Each course in the program offers a variety of projects, assignments, experiences, and assessments that align to 10.58.521 Standards for Reading Specialists K-12.

**Sources of Evidence:** Course syllabi and other documentation of course content.

**Assessment Aligned to Standard:** 10.58.521 Standards for Reading Specialists K-12.

**Evaluation:** The Reading Specialist K-12 program offered by Carroll College meets the standards outlined in 10.58.521. Candidates are provided with a variety of opportunities to utilize what they have learned about leading change, instructional practices, and intervening when students are not on target. The combination of content meant to expand candidates' knowledge and practice of theory, reading and writing development, leadership, diversity, adult learning, and curriculum creates a strong Reading Specialist program.

**Commendations:** There are a variety of opportunities for students to connect their coursework to real classroom and school experiences. The foundational components of reading appear to be taught in a thoughtful manner and are connected to assessment and intervention courses.

Seven Essential Understandings Regarding Montana Indians, the assignment in ED/PSY 229, is fundamental for future educators, as it emphasizes the diversity within Montana, including the historic and contemporary contributions and identities of our Indigenous citizens and communities.

Opportunities are provided for candidates to integrate technology thoughtfully into course work as well as how to plan professional development sessions and evaluate programs with a critical lens. These are crucial experiences and will provide them with a clear understanding of these aspects of the job of Reading Specialists.

**Improvements:** While the "Big Five" of reading development were explicitly and carefully covered in the coursework, it was less clear how and where language and writing development were covered. Oral language development is the foundation of all literacy instruction and the reviewer struggled to determine where in the coursework this aspect of the standards was addressed. Language and its ties to culture were clearly included, but strengthening the implementation of language development would strengthen the overall course program.

Similarly, there were several assignments provided as evidence that writing is addressed in the coursework. While the writing process was well covered, and a handwriting research assignment was included, it was unclear where the foundational skills of writing such as handwriting, sentence structure, etc., were explicitly taught.

While overall the evidence provided was clear, there were several areas where the evidence pointed toward a particular assignment but the language in the syllabus was vague. It is clear that these assignments are housed in an online platform that the reviewer did not have access to. While the current review for this subject area provided enough evidence that the reviewer was able to pull pieces together to determine that the standards were met, it would strengthen a future review to ensure that assignments and activities provided as evidence are clearly laid out in the documentation provided so there is no question that all standards are thoroughly met.

**Accreditation Recommendation: Met**

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Name and Number of Standard: 10.58.522 Science**

**Validating Statement:** A variety of syllabi for the general science broadfield preparation program were used to evaluate whether candidates met the 10.58.522 Science Standard. Science teacher candidates are required to take 15 Biology credits, 11 Chemistry credits, and 11 credits of Physics. The final science content requirement is 12 credits of Earth Science and there are 9 required Math and Nature of Science credits. Finally, 47 education credits are also required.

**Sources of Evidence:** Syllabi and course descriptions for all classes were reviewed and evaluated against the standard. The Institutional Self-Study Report was also used to evaluate the program.

**Assessment Aligned to Standard:** Each subcomponent of the standard was compared with the syllabus, course description and assessment to determine if the standard was met.

**Evaluation:** This program provides candidates with a comprehensive review of scientific content knowledge. Candidates have the opportunity to choose from a variety of biology courses, depending on their interests, all of which provide a solid foundation in the nature of science, the collection and analysis of scientific data, and the design and conduct of experiments. Candidates can also choose between a variety of lab and field courses to gain a broad understanding of laboratory and field techniques and safety.

**Commendations:** The Teacher Education Program (TEP) at Carroll College deserves significant commendation for its exceptional and diverse range of science course options for candidates. The curriculum offers in-depth courses in all science content areas. For example, the opportunity to participate in “Winter Ecology” provided teacher candidates with practical research skills that can be implemented in the classroom, fostering critical thinking and a love for inquiry in their students.

**Improvements:** In the education courses, such as ED 318, candidates should conduct a thorough review of the Next Generation Science Standards (NGSS) and their adaptation to the Montana science content standards (MSCS). They should also learn how standardized assessments are designed based upon the three dimensions of the NGSS: Core Content(CCs), Science and Engineering Practices (SEPs), and cross-cutting concepts (CCCs). The education class should have candidates review and evaluate lesson plans and curricula with respect to

integration of the three dimensions, followed by opportunities to design curricular lessons or units that integrate the three dimensions.

- **10.58.522.2.a.i** - While there are adequate science content classes, the only science-focused education class is ED 318 - Content Area Reading and Secondary Teaching. The course uses content-area textbooks and articles, in addition to common core standards for content areas. Montana uses the MSCS, not Common Core. The Montana science content standards are based upon the NGSS. These standards have some very important nuances; in addition to the content area standards, they include two other dimensions of CCs and SEPs. The design of the MSCS and the NGSS requires teachers to understand how SEPs and CCCs are used to develop three-dimensional standards alongside content standards.
- **10.58.522.2.a.iv.** Preparation and experience in environmental science, including American Indians and tribes in Montana and their traditional relationship to the environment could be better integrated.

Two courses: AS 218 - Introduction to Native American Studies and ED 218 - Content Area Reading and Secondary Teaching (with the lesson plan on MT Teaching Standard L 10.58.501.L) include some content about American Indians and Montana Tribes, but they connect it more to culture and heritage, and less to the relationship with the environment and how it relates to environmental science. There is no content about the transitional relationships with the environment. This connection is a highly effective method and lens for teaching environmental science concepts. Two courses that focus on environmental science, ES 124 - Climate and Environment and BI 123 - Foundations of Ecology and Environment, provide a thorough review of environmental science, including how humans are impacted and how humans impact the environment. Still, there is no evidence of content on the relationship between American Indians and the environment.

- **10.58.522.7.b.** Ability to collect and interpret empirical data using applicable science-specific technology to develop science and engineering practices, understand the cross-cutting concepts and processes, relationships, and natural patterns: This subcomponent was met because candidates will receive an excellent understanding of this content through their science content courses. However, without specific instruction regarding how to understand and implement the three dimensions of the NGSS, including SEPs and CCCs, in education classes, candidates will not explicitly be trained in how to interpret and utilize the standards to fully design and evaluate curriculum, and instruct and assess students using the NGSS.
- **10.58.522.7.h.** Conceptual understanding of earth sciences including content in astronomy, geology, paleontology, meteorology and oceanography, and their



relationships with each other.”This standard is strong except for the lack of evidence reflecting courses in paleontology.

**Accreditation Recommendation:** Met with Notation

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Name and Number of Standard: 10.58.523 Social Studies**

**Validating Statement:** The Social Studies Broadfield endorsement area was reviewed using the materials submitted including syllabi for multiple Social Studies courses.

**Sources of Evidence:** Course syllabi were provided for content related courses in history, political science, psychology, and Native American Studies. Additional syllabi included courses in Education and Special Education. A document providing an overview of required courses for students pursuing a Bachelors in Social Studies Education and a Student Teacher Handbook were also evaluated against the standard.

**Assessment Aligned to Standard:** Pre-service educator's knowledge, skills, and performance related to the standards addressed in their coursework were evaluated using a variety of assessments. These included quizzes, exams, homework, teacher work samples, observations, portfolios, and artifacts gathered during the student teaching experience. Assessments were directly aligned with the specific learning outcomes for each course.

**Evaluation:** The Social Studies Teacher Education Program (TEP) program is structured in a way where candidates receive a well rounded basis for Social Studies teaching. Candidates have opportunities to work in hands on, interest based courses such as in PO 222 and PO 312. Tribal history, cultural and contemporary events are heavily covered in the program and embedded through many of the courses. Candidates additionally receive a foundation in psychology that will benefit their classroom teaching, especially on how to meet a variety of student needs. The program's course sequence largely aligns with the standards outlined in ARM 10.58.203.

**Commendations:** The program offers a diverse range of content coursework in history and political science. Some of these courses take a hands-on approach to student learning that sets a strong foundation for teacher candidates. The curriculum and instructional practices consistently incorporate Indian Education for All. This is evident through the integration of the history, cultural heritage, language, and current status of Montana's American Indians and tribes across various course offerings.

**Improvements:** The required content and included syllabi clearly demonstrated how the Educator Preparation Program satisfies the requirements for the history and government endorsements. Despite the inclusion of sociological topics within the broadfield curriculum, the reviewer highlighted a gap in dedicated experience, raising concerns about the candidates' readiness to teach the subject effectively. Sociology constitutes a distinct pedagogical and theoretical discipline within the social sciences, requiring specialized

methodology and content knowledge that cannot be substituted by general social science exposure. Consequently, standards 10.58.523 (8)(a), (8)(b), and (8)(c) specifically need improvement.

**Accreditation Recommendation:** Met with Notation

**Carroll College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Name and Number of Standard: 10.58.532 Elementary Education**

**Validating Statement:** Carroll College provided an Institutional Self-Study Report. In the report, each component of 10.58.532 for K-8 Elementary Education standards correlated to multiple courses which fulfill the standard. For each of these courses, Carroll College also provided a location where evidence of inclusion of each component could be found in the accompanying syllabi. For some standards, there was an indication that candidates have choice in which courses would fulfill the standard.

**Sources of Evidence:** Course syllabi, assignments, projects, presentations, course descriptions, student teaching handbook.

**Assessment Aligned to Standard:** Assessment of each component of the full standard was evaluated using the provided Institutional Self-Study Report (ISSR). For each component of Standard 10.58.532, the reviewer used the ISSR to guide the evaluator to an assessment decision.

**Evaluation:** The K-8 Elementary Education program at Carroll College meets the standards outlined in 10.58.532. Teacher candidates are offered many opportunities to meet each standard, with significant integration of the standards across a variety of content areas. In addition, the program offered candidates the opportunity to apply their learning both through coursework and through field experiences in the K-8 classroom. There was also strong evidence of crossover between materials being used in the program and materials that are often used in Montana schools like the Teaching Reading Sourcebook and Danielson Framework.

**Commendation:** There is a strong emphasis in the program on integrated education; whether that be teaching content through the arts or other interdisciplinary connections. Candidates are exposed to the most up-to-date research and instructional strategies across multiple courses and are given multiple opportunities to demonstrate success. Standard (j) demonstrates knowledge, understanding, and use of interdisciplinary connections to integrate subject matter contents, employing inclusive ideas and issues that engage students' ideas, interests, concerns, and experiences was very clearly an area of strength for the program.

**Improvements:** In standard (b) demonstrate knowledge, understanding, and application of central concepts as outlined in the Montana Content Standards for students across grades K-8 and engage students in meaningful learning experiences that support students in meeting standards there is a tremendous amount of choice for students and it's important to recognize the significant breadth of this standard - however - thinking of the 4th grade standards in particular, exposure to Montana history is limited to ED312 with the elimination of the "Montana & the West" course.

Looking at standard (d) demonstrate knowledge, understanding, and application of the fundamental concepts of physical science, life science, earth and space sciences, and engineering design to design and implement developmentally appropriate inquiry lessons based in the history and nature of science, including tribal ways of knowing and scientific contributions related to tribes in Montana, to build student understanding for personal and social applications. The portion of the standard that focuses on tribes in Montana was not fulfilled by all courses listed in the Institutional Self-Study and depending on teacher candidate course choice - might not be addressed. It would be important to build these contributions into all coursework for the candidates or narrowing the candidates choices.

**Accreditation Recommendation:** Met





1601 N. Benton Avenue  
Helena, MT 59625-0002  
406-447-4300 p  
406-447-4533 f  
www.carroll.edu

April 14, 2026

**To:** Crystal Andrews  
Senior Manager  
Accreditation Unit  
Montana Office of Public Instruction

**From:** Joe Helbling  
Chair – Education Department  
Carroll College

**RE:** Rejoinder Response to 10.58.311

### **Rejoinder Response to 10.58.311 Notation**

The Educator Preparation Program respectfully disagrees with the statement that secondary candidates “rely solely on elementary methods,” as this characterization does not accurately reflect the structure of the secondary program or the evidence submitted.

Secondary candidates complete **ED 318: Content Area Reading and Secondary Methods**, a course specifically designed for middle and high school contexts. This course includes a required 45-hour field experience in a secondary classroom and emphasizes discipline-specific instructional planning, adolescent literacy development, and evidence-based pedagogical practices aligned to secondary learners. Candidates engage in lesson design, unit planning, and reflective practice grounded in both theory and field-based application.

In addition, candidates complete **ED 305: Classroom Management**, which is intentionally designed as a K–12 course grounded in research-based practices. Within this course, candidates develop and apply classroom management strategies through assignments such as the Personal Discipline Plan and Instructional Management Project. These assignments are completed in conjunction with concurrent field experiences (e.g., ED 318), allowing candidates to apply management principles in secondary classroom settings appropriate to their licensure area.

The program also ensures that candidates are well prepared in adolescent development and educational psychology. All candidates complete coursework in developmental psychology through **PSY 227: Child and Adolescent Psychology** or **PSY 203: Developmental Psychology**, which provide a research-based understanding of biological, cognitive, and psychosocial

development, including specific attention to adolescence. In addition, all candidates complete **ED/PSY 229: Educational Psychology**, which focuses on the application of psychological principles to teaching and learning. This course emphasizes how developmental processes, motivation, and individual differences influence instruction and requires candidates to design developmentally appropriate lessons based on knowledge of learners, aligned with Montana Teaching Standards.

These courses demonstrate that secondary candidates are not only developing an understanding of adolescent learners, but are also applying that knowledge directly to instructional planning and classroom practice in secondary settings, consistent with the expectations outlined in 10.58.311(a–c) .

The program would also like to clarify a potential source of misunderstanding related to course structure. Courses such as ED 305 and ED 318 include candidates from multiple program pathways (e.g., secondary majors and elementary candidates pursuing a K–12 Reading minor). While this mixed enrollment may create the perception of broadly applicable pedagogy, the course content and assignments are explicitly differentiated and aligned to candidates' intended licensure areas and field placements. **ED 318, in particular, is a secondary methods course**, and there are no instances in which secondary candidates complete elementary methods coursework as a substitute for secondary preparation.

The program acknowledges that the presence of mixed cohorts may have contributed to an interpretation that coursework is generalized. However, the evidence submitted demonstrates that secondary candidates engage in developmentally appropriate, discipline-relevant pedagogical preparation aligned to grades 6–12, including explicit connections between research, theory, and practice.

## **ITEM 11**

### **ACTION ON PRAXIS ITEMS**

- **Math – Middle School**
- **English Language Arts – Middle School**
- **Social Studies – Middle School**
- **Science – Middle School**
- **Physical Education**
- **Health**

**Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | ETS Praxis Test Recommendations for Middle School tests, Physical Education, and Health                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Presenter</b>             | Crystal Andrews                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Position Title</b>        | Senior Manager, School and Educator Effectiveness<br>Office of Public Instruction                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Overview</b>              | <p>The Montana Council of Deans of Education have unanimously voted to offer the following new Praxis exams:</p> <ol style="list-style-type: none"><li>1. Middle School Mathematics (5164)</li><li>2. Middle School English Language Arts (5047)</li><li>3. Middle School Social Studies (5589)</li><li>4. Middle School Science (5442)</li><li>5. Physical Education (5091)</li><li>6. Health (5551)</li></ol> <p>The test(s) will need a qualifying score set for the State of Montana. This is a request for action after hearing an overview of all six subtests in May. The Praxis Working Committee and Montana Council of Deans of Education have unanimously recommended the same qualifying score(s) as the expert panels.</p> |
| <b>Requested Decision(s)</b> | Action Item                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Related Issue(s)</b>      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Recommendation(s)</b>     | <p>To recommend approval of the middle school mathematics test #5164 and the qualifying score of 157.</p> <p>To recommend approval of the middle school English language arts test #5047 and the qualifying score of 164.</p> <p>To recommend approval of the physical education test #5091 and the qualifying score of 147.</p> <p>To recommend approval of the health test #5551 and the qualifying score of 154.</p> <p>To recommend approval of the middle school social studies test #5589 and the qualifying score of 149.</p> <p>To recommend approval of the middle school science test #5442 and the qualifying score of 152.</p>                                                                                              |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)



**ETS Praxis Test Review Spring 2026**  
**Final Recommendations**  
Action Item

| Test                                              | Panel Recommendation | Praxis Working Committee Recommendation | Montana Council of Deans of Education Recommendation | Superintendent Recommendation |
|---------------------------------------------------|----------------------|-----------------------------------------|------------------------------------------------------|-------------------------------|
| <b>Middle School Mathematics (5164)</b>           | <b>157</b>           | <b>157</b>                              | <b>157</b>                                           | <b>157</b>                    |
| <b>Middle School English Language Arts (5047)</b> | <b>164</b>           | <b>164</b>                              | <b>164</b>                                           | <b>164</b>                    |
| <b>Physical Education (5091)</b>                  | <b>147</b>           | <b>147</b>                              | <b>147</b>                                           | <b>147</b>                    |
| <b>Health (5551)</b>                              | <b>154</b>           | <b>154</b>                              | <b>154</b>                                           | <b>154</b>                    |
| <b>Middle School Social Studies (5589)</b>        | <b>149</b>           | <b>149</b>                              | <b>149</b>                                           | <b>149</b>                    |
| <b>Middle School Science (5442)</b>               | <b>152</b>           | <b>152</b>                              | <b>152</b>                                           | <b>152</b>                    |

The attached memorandum from the Montana Council of Deans of Education further supports this recommendation.



---

**MEMORANDUM**

---

**TO:** CRYSTAL ANDREWS  
SENIOR MANAGER, SCHOOL & EDUCATOR EFFECTIVENESS  
MONTANA OFFICE OF PUBLIC INSTRUCTION

**FROM:** MONTANA COUNCIL OF DEANS OF EDUCATION (MCDE)  
DR. JOE HELBLING, CO-CHAIR  
DR. SHAY KIDD, CO-CHAIR

**SUBJECT:** MCDE RECOMMENDATION FOR ADOPTION OF PRAXIS ASSESSMENTS AND PASSING SCORES

**DATE:** JUNE 30, 2026

At its meeting on May 26, 2026, the Montana Council of Deans of Education (MCDE) reviewed the recommendations submitted by the Praxis Working Committee (PWC) regarding the adoption of new Praxis content assessments and recommended passing scores for Montana educator licensure.

Following discussion, MCDE voted to endorse the recommendations of the Praxis Working Committee and respectfully submits the following recommendations to the Montana Office of Public Instruction for consideration by the Montana Board of Public Education.

**MCDE Recommendations**

| Praxis Assessment            | Test Code | Recommended Passing Score |
|------------------------------|-----------|---------------------------|
| Middle School Language Arts  | 5047      | 164                       |
| Middle School Social Studies | 5589      | 149                       |
| Middle School Science        | 5442      | 152                       |
| Physical Education           | 5091      | 147                       |
| Health Education             | 5551      | 154                       |

These recommendations reflect the work of Montana educator panels convened by the Praxis Working Committee and subsequently reviewed and approved by the Montana Council of Deans of Education.

On behalf of MCDE, we respectfully submit these recommendations for inclusion in the July 2026 Board of Public Education meeting materials and for consideration by the Board.

Please let us know if additional information or supporting documentation is needed

❖ **ACCREDITATION COMMITTEE – (Item 12)**

**Dr. Hannah Neiskens**

**ITEM 12**

**INFORMATION AND REVIEW OF SPECIAL  
EDUCATION TECHNICIAN RULEMAKING**

**Dr. Julie Murgel  
Patrick Cates**

# Montana Board of Public Education

## Executive Summary

**Date:** July 22-24, 2026

|                              |                                                                                                                                                                                                                                                                                                             |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Information and Review of Special Education Technician and Special Education Graduation Rulemaking in ARM 10.55 Accreditation                                                                                                                                                                               |
| <b>Presenter</b>             | Julie Murgel and Patrick Cates                                                                                                                                                                                                                                                                              |
| <b>Position Title</b>        | Chief Program Officer and Senior Manager of Safety and Student Supports<br>Montana Office of Public Instruction                                                                                                                                                                                             |
| <b>Overview</b>              | Review of Proposed Rules and Timeline: – Title 10, Chapter 55, Subchapter 6, 7, and 8 <ul style="list-style-type: none"><li>- Adopt New Definitions in 10.55.602</li><li>- Adopt New rules for the roles and responsibilities in 10.55.725</li><li>- Repeal Graduation via IEP goals in 10.55.805</li></ul> |
| <b>Requested Decision(s)</b> | Informational Item                                                                                                                                                                                                                                                                                          |
| <b>Related Issue(s)</b>      | Licensure Class 9 (ARM 10.57.439)                                                                                                                                                                                                                                                                           |
| <b>Recommendation(s)</b>     | None                                                                                                                                                                                                                                                                                                        |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)



# **Review of ARM 10.55 Recommendations for Special Education Technician Duties, Responsibilities, Definitions, and Updated Graduation Requirements for Special Education**

## **And**

## **Revision Timeline**

**Rationale:** Through a Negotiated Rulemaking Committee (NRC), the Superintendent of Public Instruction, Susie Hedalen is seeking to update [ARM 10.55.805](#) regarding special education graduation requirements and to consider the addition of definitions, duties, and responsibilities of a special education technician. Negotiated Rulemaking is required by [§ 20-7-101](#), Montana Code Annotated (MCA). The rules recommended by the Superintendent of Public Instruction were developed through the negotiated rulemaking process under Title 2, chapter 5, part 1. Based on adoption of ARM 10.57.439, for the new Special Education Technician certification, it is necessary to concurrently define the roles and responsibilities of the technician and supervising special education teacher.

The purpose of the Special Education Technician certification (ARM 10.57.439) is to increase the capacity of Montana's paraprofessionals to provide a higher level of support to Montana students with disabilities. In particular, the purpose is to certify a technician, who meets requirements to provide technical services to a special education supervising teacher, while outlining the qualifications and supervision requirements under a Supervising Special Education Teacher.

### **NRC Meeting Dates:**

|                                             |               |
|---------------------------------------------|---------------|
| <b>Orientation-Virtual:</b> May 12, 2026    | 4:00- 5:00 pm |
| <b>NRC Virtual Session #1:</b> May 19, 2026 | 3:30-5:00 pm  |
| <b>NRC Virtual Session #2:</b> June 2, 2026 | 3:30-5:00 pm  |

**Economic Impact Survey:** Currently distributed to gather responses from stakeholders. The Economic Impact Statement will be shared with the BPE in September 2026.

### **Negotiated Rule Making Committee Members:**

| <b>Appointed Member</b> | <b>NRC Role</b>                   | <b>Location</b> |
|-------------------------|-----------------------------------|-----------------|
| Aislinn Brown           | Facilitator                       | Helena          |
| Kristen Ketola          | K-12 Teacher                      | Laurel          |
| Kristie Matule          | Parent                            | Butte           |
| Brittani Brence         | School District Business Official | Ekalaka         |

|                   |                              |             |
|-------------------|------------------------------|-------------|
| Dixie Seleg       | School Administrator         | Forsyth     |
| Paul Furthmyre    | School Administrator         | Great Falls |
| Rickielynn Hughes | Montana Tribe Representative | Brockton    |
| Krystal Zentner   | School District Trustee      | Bridger     |
| Kathy Gilboy      | Higher Education             | Helena      |
| Mary DiBiase      | Taxpayer                     | Conrad      |
| Patrick Cates     | OPI                          | Belgrade    |
| Julie Murgel      | OPI                          | Helena      |
| McCall Flynn      | BPE                          | Helena      |

Contact Information: Patrick Cates, Senior Manager of Safety and Student Supports: [patrick.cates@mt.gov](mailto:patrick.cates@mt.gov)



**Proposed Amendment to ARM 10.55.805**

**10.55.805 SPECIAL EDUCATION**

- (1) Each district shall provide educational programs and services to students eligible to receive special education services as identified under IDEA.
- (2) Each district shall comply with all federal and state laws and regulations addressing special education.
- (3) Each district shall provide structured support and assistance to regular education teachers in identifying and meeting the diverse needs of students receiving special education services.
- ~~(4) A student eligible to receive special education services as identified under IDEA and who has successfully completed the goals identified on an individualized education program for high school completion shall be awarded a diploma.~~

**Proposed New Rules**

**10.55.725 SPECIAL EDUCATION TECHNICIAN**

- (1) Special education technicians, as defined in ARM 10.55.602 (45), shall be under the direction of the supervising special education teacher, as defined in ARM 10.55.602 (51), who is responsible for instruction and assessment of students with special needs.
- (2) Special education technicians, under the direct supervision of a licensed special education teacher may:
  - (a) schedule and coordinate special education meetings;
  - (b) collect, prepare, and organize student-specific data and information;
  - (c) deliver instruction in 1:1 and small group settings; and
  - (d) conduct district-level assessments and mandatory statewide assessments.
- (3) Special education technicians shall not:
  - (a) create or develop documents related to the special education record, with the exception of the contact log;
  - (b) conduct or interpret special education evaluations;
  - (c) make independent decisions regarding a student's Individualized Education Program (IEP); or
  - (d) conduct special education meetings.

**10.55.602 DEFINITIONS**

10.55.602(45) "Special education technician" means an individual that is certified under ARM 10.57.439, to work under the direction of the supervising special education teacher as defined in ARM 10.55.602 (51), and provides services authorized in ARM 10.55.725.

10.55.602(51) "Supervising special education teacher" means an individual who holds a current Class 1 or Class 2 teacher's license with a special education P-12 endorsement and supervises a special education technician as defined in ARM 10.55.602 (45).

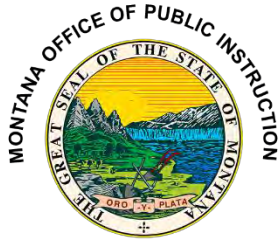
❖ **EXECUTIVE COMMITTEE – (Item 13)**

**Dr. Tim Tharp**

**ITEM 13**

**INFORMATION AND REVIEW OF  
MONTANA SCHOOL BUS STANDARDS  
RULEMAKING**

**Elsie Workman, OPI  
Mike Krout, Majestic Transportation  
Neal Ullman, DEQ**



# Montana Board of Public Education

## Executive Summary

**Date:** July 23<sup>rd</sup>, 2026

|                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b> | The Office of Public Instruction will provide the Board of Public Education with an overview of the proposed revisions to the Montana School Bus Standards. The proposed revisions incorporate recommendations from the 2025 National Congress on School Transportation (NCST), align with current federal requirements, and improve clarity and consistency throughout the document.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Presenter</b>    | Elsie Workman, State Pupil Transportation Specialist<br>Neal Ullman, Montana DEQ<br>Mike Krout, President of Majestic Bus Service, Inc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Overview</b>     | <p>The Montana Office of Public Instruction is proposing the adoption of the 2025 Montana School Bus Standards requiring amendments to the following:</p> <p><b>2022 Montana School Bus Standards and Resource Materials</b></p> <ul style="list-style-type: none"><li>• ARM 10.7.110 – Standards for School Buses</li><li>• ARM 10.64.301 – School Bus Requirements</li><li>• ARM 10.64.342 – Replacement Parts</li></ul> <p><b>Key Proposed Revisions</b></p> <ul style="list-style-type: none"><li>• Incorporates recommendations from the 2025 National Congress on School Transportation (NCST).</li><li>• Reorganizes the current 2022 standards to primarily focus on school bus specifications.</li><li>• Separates guidance and resource materials into standalone guidance documents (e.g., Human Resources References, First Aid and Medical Forms)</li><li>• Add a new section addressing electric school buses.</li><li>• Update technical and operational standards.</li><li>• Clarifies existing requirements and improves organization and consistency throughout the document.</li></ul> |

|                              |                                                                                                                                         |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| <b>Requested Decision(s)</b> | Action                                                                                                                                  |
| <b>Related Issue(s)</b>      |                                                                                                                                         |
| <b>Recommendation(s)</b>     | The OPI requests the Board of Public Education to proceed with the adoption of the revisions for the 2025 Montana School Bus Standards. |





## 2022 Montana School Bus Standards Revisions

The OPI has updated the 2022 Montana School Bus Standards to align with the National Congress on School Transportation (NCST) standards, which are revised every five years. Under 20-10-111, MCA Montana reviews and adopts these standards for student transportation. These revisions are being submitted to the Board of Public Education for review.

The following information provides a detailed summary of revisions including individual pages that reflect these revisions.

### General Updates:

**Title Page:** Update publication year to 2025

**Title Page:** Replacing the OPI logo with the Montana State Seal

**Title Page:** Updated the cover image

**Acknowledgments:** To be updated

**Table of Contents:** To be updated

### Introduction:

- o Updated language for clarity, consistency, and accuracy.
- o Revised terminology and references to align with current standards.
- o Refined wording throughout the Introduction.
- o Updated content to reflect current practices.

### Bus Rules Matrix

- o Removed the Bus Rules Matrix to eliminate redundant information and improve document organization.

### Bus Body and Chassis Systems:

- o Formatting updated throughout the section consistency and readability.
- o Applied formatting updates throughout the document.
- o Standardized formatting throughout the document.
- o Added Electric Vehicle (EV) requirements, including charging systems, high-voltage safety, vehicle identification, ignition systems, regenerative braking, DC-DC converters, and battery management system protections.

### Electric Vehicle Requirements:

- o Added new Electric Vehicle (EV) standards to establish requirements for electric school bus design, operation, and safety.
- o Established charging system requirements, including compatibility with CCS, NACS, and SAE J1772 charging standards, as well as Level II AC and DC fast charging capabilities.
- o Added requirements for high-voltage systems, including battery isolation, electrical protection, hazard labeling, and secure access to high-voltage components.
- o Established requirements for DC-DC converters, ignition interlocks, regenerative braking, battery management system protections, and automatic system shutdowns.

- o Added vehicle identification and battery disconnect labeling requirements to support emergency response and maintenance.

#### **First Aid Kit /Body Fluids Clean up Inspection:**

- o Separated the First Aid Kit and Body Fluid Clean-Up Kit inspection forms from the standards to improve readability and reduce document length.

#### **Mobile Data Device (Optional):**

- o Added standards for the optional use of Mobile Data Devices (MDDs), such as tablets or onboard electronic devices used for navigation, routing, communication, and other transportation-related functions.
- o Included requirements for safe mounting and placement to prevent obstruction of the driver's view and vehicle controls.
- o Required MDDs to be securely mounted to reduce safety hazards.
- o Limited MDD functionality while the bus is in motion to minimize driver distraction.

#### **Stop Arms:**

- o Renamed the section title from "Stop Signal Arm" to "Stop Arms."
- o Consolidated all extended stop arm requirements into the Stop Arms section for improved organization and easier reference.

### **Specially Equipped School Buses:**

- o Updated the section to align with the National Congress on School Transportation (NCST) standards.
- o Revised and reorganized language throughout the section to improve clarity and consistency while maintaining existing safety requirements.

### **Type E School Buses:**

- o Cleaned up language throughout the section to improve readability and consistency.

### **Alternative Fuels:**

- o Updated requirements for alternative fuel school buses, including CNG, LPG, biodiesel, and high-voltage battery-electric vehicles.
- o Added standards for high-voltage battery-electric buses.
- o Revised language for clarity and consistency.

### **Specification for School Bus Inspection:**

- o Retitled the section from Operations to Specification for School Bus Inspection to better reflect the section's focus on school bus inspection requirements.
- o Relocated the section to follow Alternative Fuels, improving the organization and flow of the standards.

- o Clarified inspection requirements and revised language for consistency and readability.

## State Administration:

- o Removed the State Administration section to keep the standards focused on school bus requirements and specifications.

## Bus Driver Qualifications:

- o Added the requirement that school transportation staff complete a fingerprint-based background check, in accordance with 20-3-323, MCA.

## Limiting the Use of Electronic Devices:

- o Clarified that school districts may not allow or require drivers to engage in texting while operating a school bus.
- o Removed detailed definitions to simplify the section while retaining the emergency exception for communicating with law enforcement or emergency services.

## Prohibition Against Using a Hand-Held Device:

- o Clarified the prohibition on using hand-held electronic devices while operating a school bus.
- o Added a prohibition on school districts allowing or requiring drivers to use electronic devices while driving.
- o Simplified the section by removing detailed definitions and retaining exceptions for mounted route devices, emergencies, and two-way radios.

## Prohibition Against Using Earphones:

- o Expanded the prohibition to include earphones, headphones, earbuds, and other Bluetooth devices while operating a school bus.
- o Removed detailed definitions to simplify the section.
- o Retained the exception allowing the use of these devices when communicating with law enforcement or emergency services.

## Drug and Alcohol Testing of Bus Drivers:

- o Removed outdated references to specific FMCSA testing percentages, training requirements, and employer responsibilities.
- o Simplified the section to focus on the federal drug and alcohol testing requirements applicable to school bus drivers.
- o Updated references for clarity and consistency.

## District Policy Guidelines:

- o Added requirements for home parking of school buses, including written authorization, annual review, driver check-in procedures, fitness for duty, compliance with testing requirements, and audit documentation.
- o Revised language throughout the section for clarity and consistency.

## Transportation Special Circumstances:

- o Updated the McKinney-Vento Homeless Assistance Act section to align with current federal guidance and requirements.
- o Revised the section based on recommendations from OPI Federal Grants Coordinator Marisa Britton Bostwick.

## Glossary of Terms and Definitions:

- o Updated the glossary to add new terms, revise definitions, and remove outdated language.

## National School Transportation Specification and Procedures:

- o Removed sections containing outdated guidance and supplemental reference material, as this information is more appropriately maintained at the district level.

## Human Resources Reference:

- o Removed forms, checklists, and supplemental resources from the Montana School Bus Standards.
- o Developed separate guidance documents so these resources remain available for school districts while keeping the standards focused on requirements.

## Reference Locations:

- o Removed reference links to prevent outdated or broken website links within the Montana School Bus Standards.

## INTRODUCTION

The Montana Board of Public Education, with the guidance of the Office of Public Instruction and the Montana Department of Justice, promulgates these *School Bus Standards*, ~~with the advice of the Montana Office of Public Instruction and the Montana Department of Justice,~~ in accordance with 20-10-111, MCA. The purpose of these School Bus Standards help is to promote ensure the safe, and efficient, and reliable transportation of students to and from school as well as to and from and on related school activities activity trips.

These ~~standards~~ are based on federal regulation requirements, the 2015 National School Transportation Specifications and Procedures, the specifications of the Society of Automobile Engineers, Montana Code Annotated (MCA), Montana Administrative Rules of Montana (ARM), and best practices outlined in the 2025 National School Transportation Specifications and Procedures.

These *School Bus Standards* apply to school buses and activity buses only and are ~~promulgated~~ guided with by the following guiding principles:

1. Ensure the construction and use of safe buses;
- ~~2. Be consistent with the objectives of safety, security, and efficiency;~~
- ~~3.2.~~ 2. Be consistent with Federal Motor Vehicle Safety Standards (FMVSS);
- ~~3. Be consistent~~ Align with the National Highway Traffic Safety Administration (NHTSA) Highway Safety Guideline ~~#17–Pupil Transportation Safety;~~
4. Promote safety, efficiency, and cost effectiveness;
5. Not unduly increase operation or production cost; and
6. Allow for state approval of ~~the use of~~ new technology and safety improvements. ~~consistent with safety, security, and efficiency.~~<sup>1</sup>

~~School buses are the most regulated motor vehicle on the road.<sup>2</sup> School buses are designed differently than other motor vehicles increasing safety through the use of high visibility yellow, flashing lights, stop arms, and manufacturing requirements.<sup>3</sup> The National Traffic and Motor Vehicle Safety Act requires the individual selling or leasing a new school bus to only sell or lease a vehicle that meets the Federal Motor Vehicle Safety Standards FMVSS. NHTSA defines a school bus as a vehicle with a capacity of 11 or more people, including the driving, that is sold or leased with the intent of transporting students to and from school or on activity trips.~~

~~It is appropriate to require higher levels of safety in transporting students to and from school, and school-related activities. Montana's School Bus Standards holds the highest level of safety and governs the requirements of the safest vehicle for transporting children—a school bus.~~

A school bus is the only primary authorized method of ~~transportation to~~ transporting children to and from school. Although ~~not recommended by~~ the Board of Public Education does not recommend the use of other vehicles,<sup>4</sup> ~~School districts have historically used motor coaches to transport children on for school-school-related trips. In 2021, the Montana Legislature authorized permitted school districts to use passenger vehicles meeting that meet the specific statutory requirements to transport for transporting children on school trips.~~

### NOTE:

1. The ~~National Highway Traffic Safety Administration NHTSA~~ regulates the manufacture and sale of new vehicles used to transport ~~preprimary~~ early childhood education, primary, or secondary ~~school~~ students to ~~or and~~ from school or related events, ~~u~~ Unless the vehicle complies with the FMVSSs prescribed for school busses or Multifunction School Activity Buses (MFSABs), it cannot be used for student transportation. A school in Any violation of this requirement may ~~be subject to result in~~ substantial civil penalties under the National Traffic and Motor Vehicle Safety Act.

---

<sup>1</sup> ~~These guiding principles are based on the National Congress on School Transportation's Guiding Principles~~

<https://nasdpts.org/Guiding-Principles>

<sup>2</sup> National Highway Traffic Safety Administration <https://www.nhtsa.gov/road-safety/school-bus-safety>

<sup>3</sup> National Highway Traffic Safety Administration <https://www.nhtsa.gov/road-safety/school-bus-safety>

2. ~~Local~~<sup>SS</sup>School ~~D~~<sup>d</sup>istricts must determine if the purchase of a new vehicle meets the federal requirements of a school bus and whether they may subject themselves to civil penalties.
3. ~~Local~~<sup>SS</sup>School ~~d~~<sup>D</sup>istricts must carefully review the transportation options available to them and make the best decision to transport children safely.

These *School Bus Standards*:

1. Apply to *school buses* transporting children to and from school and on activity trips;
2. Do *NOT* apply to any vehicle transporting children that is not a school bus, including ~~Multi-Function School- and Activity Buses~~<sup>MFSAB</sup>, Charter Buses, and passenger vehicles;

The Office of Public Instruction:

1. May assist school districts in understanding the *School Bus Standards*;
2. *CANNOT* provide legal advice, including
  - a. Who to hire as a school bus driver;
  - b. Whether a particular vehicle complies with the School Bus Standards; and
  - c. Whether using a motor coach or passenger vehicle to transport students complies with federal regulation.

Our ~~student's~~<sup>students'</sup> safety during transportation is of utmost importance and we are committed to collaborating with local school districts, schools, law enforcement, and others to ensure the safe transportation of every child to and from school and on activity trips.

*(The remainder of this page left intentionally blank)*



## MONTANA SCHOOL BUS TYPES



A **Type “A”** school bus is a van conversion or bus constructed utilizing a cutaway front-section vehicle with a left side driver’s door. The entrance door is behind the front wheels. The definition includes two classifications:

**Type A-1**, with a Gross Vehicle Weight Rating (GVWR) less than or equal to 10,000 pounds.



**Type A-2**, with a GVWR greater than 10,000 pounds.



A **Type “B”** school bus is constructed utilizing a stripped chassis. The entrance door is behind the front wheels. This definition includes two classifications: Type B-1, with a GVWR less than or equal to 10,000 pounds; and Type B-2, with a GVWR greater than 10,000 pounds



A **Type “C”** school bus is constructed utilizing a chassis with a hood and front fender assembly. The entrance door is behind the front wheels.



A **Type “D”** school bus is constructed utilizing a stripped chassis. The entrance door is ahead of the front wheels.



A **Type “E”** school bus is district-owned, is designed to carry 10 or fewer passengers, has an overall safety rating of five stars from the National Highway Traffic Ssafety Aadministration at the time of purchase, is insured in accordance with minimum coverage requirements set forth in 20-10-109, MCA, and is purchased after 7/1/2017.

## **BUS RULES MATRIX**

The following matrix is designed to be a guide to using the document as it relates to each school bus type. If an area listed in the document is not specific to the bus type, please refer to this matrix when determining what rules apply.

**Note:** *The mechanical and equipment standards are in effect for all school buses manufactured on or after official adopted date, unless specifically stated otherwise. All operational standards are in affect for all school buses as of the effective date of these standards, unless specifically stated otherwise*

| Section of Standards                 | Type-A   | Type-B   | Type-C   | Type-D   | Type-E   |
|--------------------------------------|----------|----------|----------|----------|----------|
| REPLACEMENT PARTS                    | YES      | YES      | YES      | YES      | YES      |
| AIR CLEANER                          | YES      | YES      | YES      | YES      | NA       |
| AIR CONDITIONING SYSTEMS (OPTIONAL)  | OPTIONAL | OPTIONAL | OPTIONAL | OPTIONAL | OPTIONAL |
| AISLE                                | YES      | YES      | YES      | YES      | NA       |
| AXLES                                | YES      | YES      | YES      | YES      | NA       |
| BACKUP WARNING ALARM                 | YES      | YES      | YES      | YES      | YES      |
| BRAKES                               | YES      | YES      | YES      | YES      | NA       |
| BUMPER                               | YES      | YES      | YES      | YES      | NA       |
| CEILING                              | YES      | YES      | YES      | YES      | NA       |
| CERTIFICATION                        | YES      | YES      | YES      | YES      | YES      |
| CHAINS/TIRE                          | YES      | YES      | YES      | YES      | NA       |
| COLOR                                | YES      | YES      | YES      | YES      | NA       |
| CONSTRUCTION                         | YES      | YES      | YES      | YES      | NA       |
| CROSSING CONTROL ARM                 | YES      | YES      | YES      | YES      | NA       |
| DEFROSTERS                           | YES      | YES      | YES      | YES      | YES      |
| DOORS                                | YES      | YES      | YES      | YES      | NA       |
| DRIVE SHAFT                          | YES      | YES      | YES      | YES      | NA       |
| ELECTRICAL SYSTEM                    | YES      | YES      | YES      | YES      | NA       |
| EMERGENCY EXITS                      | YES      | YES      | YES      | YES      | NA       |
| EMERGENCY EQUIPMENT                  | YES      | YES      | YES      | YES      | YES      |
| EXHAUST SYSTEM                       | YES      | YES      | YES      | YES      | NA       |
| FENDERS, FRONT                       | YES      | YES      | YES      | YES      | NA       |
| FLOORS                               | YES      | YES      | YES      | YES      | NA       |
| FRAME                                | YES      | YES      | YES      | YES      | NA       |
| FUEL SYSTEM                          | YES      | YES      | YES      | YES      | NA       |
| GOVERNOR                             | YES      | YES      | YES      | YES      | NA       |
| HANDRAILS                            | YES      | YES      | YES      | YES      | NA       |
| HEATING SYSTEM PROVISION             | YES      | YES      | YES      | YES      | NA       |
| HEATING AND AIR CONDITIONING SYSTEMS | YES      | YES      | YES      | YES      | YES      |
| HORN                                 | YES      | YES      | YES      | YES      | YES      |
| HINGES                               | YES      | YES      | YES      | YES      | NA       |
| IDENTIFICATION                       | YES      | YES      | YES      | YES      | NA       |
| INSIDE HEIGHT                        | YES      | YES      | YES      | YES      | NA       |
| INSTRUMENTS AND INSTRUMENT PANEL     | YES      | YES      | YES      | YES      | NA       |

| Section of Standards | Type-A | Type-B | Type-C | Type-D | Type-E |
|----------------------|--------|--------|--------|--------|--------|
| INSULATION           | YES    | YES    | YES    | YES    | NA     |
| INTERIOR             | YES    | YES    | YES    | YES    | NA     |

|                                       |          |          |          |          |     |
|---------------------------------------|----------|----------|----------|----------|-----|
| LAMPS AND SIGNALS                     | YES      | YES      | YES      | YES      | NA  |
| METAL TREATMENT                       | YES      | YES      | YES      | YES      | NA  |
| MIRRORS                               | YES      | YES      | YES      | YES      | NA  |
| MOUNTING                              | YES      | YES      | YES      | YES      | NA  |
| OIL FILTER                            | YES      | YES      | YES      | YES      | NA  |
| OPENINGS                              | YES      | YES      | YES      | YES      | NA  |
| OVERALL LENGTH                        | YES      | YES      | YES      | YES      | NA  |
| OVERALL WIDTH                         | YES      | YES      | YES      | YES      | NA  |
| PASSENGER LOAD                        | YES      | YES      | YES      | YES      | NA  |
| PUBLIC ADDRESS SYSTEM                 | YES      | YES      | YES      | YES      | YES |
| RETARDER SYSTEM (OPTIONAL EQUIPMENT)  | OPTIONAL | OPTIONAL | OPTIONAL | OPTIONAL | NA  |
| RETRO-REFLECTIVE MATERIAL             | YES      | YES      | YES      | YES      | NA  |
| RUB RAILS                             | YES      | YES      | YES      | YES      | NA  |
| SEATS AND RESTRAINING SYSTEM          |          |          |          |          |     |
| PASSENGER SEATING                     | YES      | YES      | YES      | YES      | YES |
| SEAT, LAP AND SHOULDER BELTS          | YES      | YES      | YES      | YES      | YES |
| SEAT—PRE SCHOOL AGE SEATING           | YES      | YES      | YES      | YES      | YES |
| DRIVER SEAT                           | YES      | YES      | YES      | YES      | YES |
| DRIVER RESTRAINT SYSTEM               | YES      | YES      | YES      | YES      | YES |
| SEAT BELT CUTTER                      | YES      | YES      | YES      | YES      | YES |
| SHOCK ABSORBERS                       | YES      | YES      | YES      | YES      | NA  |
| SIDE SKIRTS                           | YES      | YES      | YES      | YES      | NA  |
| STEERING GEAR                         | YES      | YES      | YES      | YES      | NA  |
| STEPS                                 | YES      | YES      | YES      | YES      | YES |
| STEP TREADS                           | YES      | YES      | YES      | YES      | NA  |
| STIRRUP STEPS                         | YES      | YES      | YES      | YES      | NA  |
| STOP SIGNAL ARM                       | YES      | YES      | YES      | YES      | NA  |
| STORAGE COMPARTMENT                   | YES      | YES      | YES      | YES      | NA  |
| SUN SHIELD                            | YES      | YES      | YES      | YES      | NA  |
| SUSPENSION SYSTEM                     | YES      | YES      | YES      | YES      | NA  |
| THROTTLE                              | YES      | YES      | YES      | YES      | NA  |
| TIRES AND RIMS                        | YES      | YES      | YES      | YES      | NA  |
| TOWING ATTACHMENT POINTS              | YES      | YES      | YES      | YES      | NA  |
| TRACTION ASSISTING DEVICES (OPTIONAL) | YES      | YES      | YES      | YES      | NA  |
| TRANSMISSION                          | YES      | YES      | YES      | YES      | NA  |
| TRASH CONTAINER AND HOLDING DEVICE    | YES      | YES      | YES      | YES      | NA  |
| TURNING RADIUS                        | YES      | YES      | YES      | YES      | NA  |
| UNDERCOATING                          | YES      | YES      | YES      | YES      | NA  |
| VENTILATION                           | YES      | YES      | YES      | YES      | NA  |
| WARNING STATEMENTS                    | YES      | YES      | YES      | YES      | NA  |
| WHEEL HOUSING                         | YES      | YES      | YES      | YES      | NA  |

| Section of Standards | Type-A | Type-B | Type-C | Type-D | Type-E |
|----------------------|--------|--------|--------|--------|--------|
| WINDOWS              | YES    | YES    | YES    | YES    | NA     |
| WINDSHIELD WASHERS   | YES    | YES    | YES    | YES    | NA     |
| WINDSHIELD WIPERS    | YES    | YES    | YES    | YES    | NA     |

|                                                                      |          |          |          |          |          |
|----------------------------------------------------------------------|----------|----------|----------|----------|----------|
| <b>SPECIALLY EQUIPPED SCHOOL BUSES SECTION</b>                       |          |          |          |          |          |
| AISLES                                                               | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | NA       |
| COMMUNICATIONS                                                       | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| GLAZING                                                              | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | NA       |
| IDENTIFICATION                                                       | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| PASSENGER CAPACITY RATING                                            | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| POWER LIFTS                                                          | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| REGULAR SERVICE ENTRANCE                                             | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | NA       |
| RESTRAINING DEVICES                                                  | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| SEATING ARRANGEMENTS                                                 | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| SECUREMENT/RESTRAINT SYSTEM FOR WHEELCHAIR/MOBILITY AID AND OCCUPANT | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| SPECIAL LIGHT                                                        | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | NA       |
| SPECIAL SERVICE ENTRANCE                                             | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | NA       |
| SPECIAL SERVICE ENTRY DOORS                                          | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | NA       |
| SUPPORT EQUIPMENT AND ACCESSORIES                                    | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| TECHNOLOGY AND EQUIPMENT, NEW                                        | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP | IF EQUIP |
| <b>TYPE E SCHOOL BUSES</b>                                           |          |          |          |          |          |
| <b>GENERAL VEHICLE REQUIREMENTS</b>                                  | NA       | NA       | NA       | NA       | YES      |
| <b>RECOMMENDED REQUIREMENTS</b>                                      | NA       | NA       | NA       | NA       | YES      |
| <b>OPERATIONAL REQUIREMENTS</b>                                      | NA       | NA       | NA       | NA       | YES      |
| ALTERNATIVE FUELS                                                    | NA       | NA       | NA       | NA       | YES      |
| <b>OPERATIONS</b>                                                    |          |          |          |          |          |
| <b>SCHOOL BUSES AND TRANSPORTATION</b>                               | YES      | YES      | YES      | YES      | YES      |
| SEMI-ANNUAL BUS INSPECTIONS                                          | YES      | YES      | YES      | YES      | YES      |
| SCHOOL TRAVEL CHOICES                                                | YES      | YES      | YES      | YES      | YES      |
| STATE ADMINISTRATION                                                 | YES      | YES      | YES      | YES      | YES      |
| USE OF BUS AUDIO/VIDEO MONITORING SYSTEMS                            | YES      | YES      | YES      | YES      | YES      |
| <b>BUS DRIVER QUALIFICATIONS</b>                                     |          |          |          |          |          |
| BUS DRIVER LICENSING                                                 | YES      | YES      | YES      | YES      | PARTIAL  |
| DRUG AND ALCOHOL TESTING OF BUS DRIVERS                              | YES      | YES      | YES      | YES      | YES      |
| DRIVER IN SERVICE TRAINING PROGRAM                                   | YES      | YES      | YES      | YES      | YES      |
| <b>DISTRICT POLICY GUIDELINES</b>                                    |          |          |          |          |          |
| ADVERTISING ON A SCHOOL BUS                                          | YES      | YES      | YES      | YES      | YES      |
| SCHOOL BUS STOPS                                                     | YES      | YES      | YES      | YES      | YES      |
| DESIGNATED STOPS                                                     | YES      | YES      | YES      | YES      | YES      |
| PROHIBITED SCHOOL BUS STOPS                                          | YES      | YES      | YES      | YES      | YES      |

| Section of Standards                                                 | Type-A | Type-B | Type-C | Type-D | Type-E |
|----------------------------------------------------------------------|--------|--------|--------|--------|--------|
| SPEED LIMITS                                                         | YES    | YES    | YES    | YES    | YES    |
| TRANSPORTATION SPECIAL CIRCUMSTANCES                                 |        |        |        |        |        |
| MCKINNEY-VENTO HOMELESS ASSISTANCE ACT OVERVIEW                      | YES    | YES    | YES    | YES    | YES    |
| EVERY STUDENT SUCCEEDS ACT OVERVIEW                                  | YES    | YES    | YES    | YES    | YES    |
| SEATING REQUIREMENTS                                                 |        |        |        |        |        |
| SCHOOL BUS EVACUATIONS                                               | YES    | YES    | YES    | YES    | YES    |
| EVACUATION PROCEDURES                                                | YES    | YES    | YES    | YES    | YES    |
| TRANSPORTATION FOR SCHOOL RELATED ACTIVITY FUNCTIONS                 |        |        |        |        |        |
| GENERAL REQUIREMENTS OF TRANSPORTATION FOR SCHOOL RELATED ACTIVITIES | YES    | YES    | YES    | YES    | YES    |
| PASSENGER VANS—ACTIVITY AND SCHOOL RELATED                           | YES    | YES    | YES    | YES    | YES    |
| TRAINING                                                             | YES    | YES    | YES    | YES    | YES    |

## INTRODUCTION TO SCHOOL BUS SPECIFICATIONS

The School Bus Standards outline Bus Body and Chassis Specifications, Specially Equipped School Bus Specifications, Specifications for School Bus Inspection, Alternative Fuel and other related standards. These standards establish the requirements that manufacturers, school districts, and maintenance personnel must follow to ensure safety and compliance with state and federal regulations.

For new vehicles, manufacturers are responsible for meeting all applicable standards at the time of production. Once in service, it becomes the responsibility of school districts and operators to maintain compliance through inspections, proper repairs, and the use of quality parts.

## BUS BODY AND CHASIS SYSTEMS

### REPLACEMENT PARTS

The ~~Standards for School Buses in Montana~~ School Bus Standards apply to all new school buses to be used to transport students in Montana. Although it is recommended that used school buses be re-equipped with parts and supplies that meet the construction standards as they are replaced through periodic maintenance and repair, it is not intended that the requirements of these standards preclude the use of replacement parts or supplies that do not meet these higher standards when said parts and supplies are not readily available for emergency and/or roadside repairs. Further, it is not intended that the use of such regular parts, because of the lack of readily availability, should incur increased liability to the operator or district should damages or risk occur because of the use or failure of that part or supply when such district or operator has acted in good faith in making the emergency and/or roadside repair(s). If emergency and/or roadside repairs are made with regular standard parts, or supplies, it is recommended that said parts or supplies be replaced by parts or supplies which meet or exceed the standards for school buses in Montana within 60 days. ARM 10.64.342.

### AIR CLEANER

1. ~~The engine intake A dry element air cleaner shall be provided. system shall be furnished and properly installed by the chassis manufacturer to meet engine manufacturer's specifications.~~
2. All diesel engine air filters shall include a latch-type restriction indicator that retains the maximum restriction developed during operation of the engine. The indicator should include a reset control so the indicator can be returned to zero when desired. The indicator should not reduce or replace the timing for

regular maintenance.

#### AIR CONDITIONING SYSTEMS (OPTIONAL)

The following specifications are applicable to all types of school buses that may be equipped with air conditioning. This section is divided into two parts. Part A covers performance specifications and Part B covers other requirements applicable to all buses.

##### 1. Performance Specifications

- a. The installed air conditioning system should cool the interior of the bus down to at least 80 degrees Fahrenheit, measured at a minimum of three points, located four feet above the floor at the longitudinal centerline of the bus. The three points shall be:
  - i. near the driver's location;
  - ii. at the midpoint of the body; and
  - iii. two feet forward of the emergency door, or, for Type D rear-engine buses, two feet forward of the end of the aisle.
- b. The test conditions under which the above performance must be achieved shall consist of:
  - i. placing the bus in a room (such as a paint booth) where ambient temperature can be maintained at 100 degrees Fahrenheit;
  - ii. heat soaking the bus at 100 degrees Fahrenheit with windows open for at least one hour; and
  - iii. closing windows, turning on the air conditioner with the engine running at the chassis manufacturer's recommended low idle speed, and cooling the interior of the bus to 80 degrees Fahrenheit or lower within a maximum of 30 minutes while maintaining 100 degrees Fahrenheit outside temperature.
- c. Alternately, and at the user's discretion, this test may be performed under actual summer conditions, which consist of temperatures above 85 degrees Fahrenheit, humidity above 50 percent with normal sun loading of the bus and the engine running at the engine manufacturer's recommended low idle speed. After a minimum of one hour of heat soaking, the system shall be turned on and must provide a minimum 20 degrees temperature drop in the 30-minute time limit.
- d. The manufacturer shall provide facilities for the user or user's representative to confirm that a pilot model of each bus design meets the above performance requirements.

##### 2. Other Requirements

- a. Evaporator cases, lines and ducting (as equipped) shall be designed in such a manner that all condensation is effectively drained to the exterior of the bus below the floor level under all conditions of vehicle movement and without leakage on any interior portion of bus.
- b. Any evaporator or ducting system shall be designed and installed to be free of injury-prone projections or sharp edges. Any ductwork shall be installed so that exposed edges face the front of the bus and do not present sharp edges.
- c. On specially equipped school buses, the evaporator and ducting (if used) shall be placed high enough that they will not obstruct occupant securement shoulder strap upper attachment points. This clearance shall be provided along the entire length of the passenger area on both sides of the bus interior to allow for potential retrofitting of new wheelchair positions and occupant securement devices throughout the bus.
- d. The body may be equipped with insulation, including sidewalls, roof, firewall, and rear, inside body bows and plywood or composite floor insulation to aid in heat dissipation and reflection.
- e. All glass (windshield, service and emergency doors, side and rear windows) may be equipped with maximum integral tinting allowed by federal, state, or ANSI standards for the respective locations, except that windows rear of the driver's compartment, if tinted shall have approximately 28 percent light transmission.
- f. Electrical generating capacity shall be provided to accommodate the additional electrical demands imposed by the air conditioning system.
- g. Roofs may be painted white to aid in heat dissipation.



- h. Air intake for any evaporator assembly (ies), except for front evaporator of Type A-1, shall be equipped with replaceable air filter(s) accessible without disassembly of evaporator case.

#### AISLE

All emergency [exit](#) doors shall be accessible by a 12-inch minimum aisle. The aisle shall [always](#) be unobstructed ~~always by any type of barrier, seat, wheelchair or tie-down~~, unless a flip seat is installed and occupied. The track of a track seating system is exempt from this requirement. A flip seat in the unoccupied (up) position shall not obstruct the 12-inch minimum aisle to any side emergency [exit](#) door.

#### AXLES

The front and rear axle and suspension systems shall have Gross Axle Weight Rating (GAWR) at ground commensurate with the respective front and rear weight loads of the bus loaded to the rated passenger capacity.

#### BACKUP WARNING ALARM

An automatic audible alarm shall be installed behind the rear axle and shall comply with the published Backup Alarm Standards [of Society of Automotive Engineers \(SAE\) J994B](#), providing a minimum of 112 dBA for rubber-tired vehicles required on buses ordered after the effective date.

#### BACK-UP CAMERA (OPTIONAL)

A back-up camera may be installed to view the area of restricted visibility to the rear of the bus. If installed:

1. The back-up camera shall only activate when the bus is in reverse.
2. The monitor to view the back-up camera video:
  - a. May be integrated into the interior rearview mirror, or
  - b. May be integrated as part of the dashboard.

#### BRAKES

##### 1. General Brakes

- a. The chassis brake system shall conform to the provisions of FMVSS No. 105, Hydraulic and Electric Brake Systems, No. 106, Brake Hoses, and No. 121, Air Brake Systems as applicable.
- b. All buses shall have either a parking pawl in the transmission or a park brake interlock that require the service brake to be applied to allow release of the parking brake.
- c. The anti-lock brake system (ABS, provided in accordance with FMVSS No. 105, or No. 121, shall provide wheel speed sensors for each front wheel and for each wheel on at least one rear axle. The system shall provide anti-lock braking performance for each wheel equipped with sensors. (Four-Channel System)
- d. All brake systems shall be designed to permit visual inspection of brake lining wear without removal of any chassis component(s).
- e. The brake lines, booster-assist lines, and control cables shall be protected from excessive heat, vibration and corrosion and shall be installed in a manner that prevents chafing.
- f. The parking brake system for either air or hydraulic service brake systems may be of a power-assisted design. The power parking brake actuator should be a push-pull device located on the instrument panel within seated reach of a 5th percentile female driver. As an option, the parking brake may be set by placing the automatic transmission shift control mechanism in the "park" position.
- g. The power-operated parking brake system may be interlocked to the engine key switch. Once the parking brake has been set and the ignition switch turned to the "off" position, the parking brake cannot be released until the key switch is turned back to the "on" position.

##### 2. Hydraulic Brakes

Buses using hydraulic-assist brakes shall meet requirements of FMVSS [No. 105](#).

##### 3. Air Brakes

- a. The air pressure supply system shall include a desiccant-type air dryer installed per the manufacturers' recommendations. The air pressure storage tank system may incorporate an automatic drain valve.
- b. The chassis manufacturer should provide a necessary outlet for air-operated systems installed by the body manufacturer. This outlet shall include a pressure protection valve.
- c. For air brake systems, a dual air pressure gauge shall be provided in the instrument panel capable of complying with CDL pre-trip inspection requirements.
- d. Air brake systems may include a system for anti-compounding of the service brakes and parking brakes.
- e. Air brakes shall have both a visible and audible warning device when the air pressure falls below the level where warnings are required under FMVSS No.121.

## BUMPER

### 1. Front Bumpers

- a. All school buses shall be equipped with a front bumper. The front bumper shall be furnished by the chassis manufacturer as part of the chassis on all types of chassis unless there is a specific arrangement between the chassis manufacturer and body manufacturer that the body manufacturer will furnish the front bumper.
- b. The front bumper shall be of pressed steel channel or equivalent material (except Type A buses having a GVWR of 14,500 pounds or less which may be [Original Equipment Manufacturer \(OEM\)](#) supplied) at least 3/16 inches thick and not less than eight inches wide (high). It shall extend beyond the forward-most part of the body, grille, hood, and fenders and shall extend to the outer edges of the fenders at the bumper's top line.
- c. The front bumper, except breakaway bumper ends, shall be of sufficient strength to permit pushing a vehicle of equal gross vehicle weight without permanent distortion to the bumper, chassis, or body.
- d. Tow eyes or hooks shall be furnished and attached so as not to project beyond the front bumper. Tow eyes or hooks attached to the frame chassis shall be furnished by the chassis manufacturer or by the body manufacturer. This installation shall be in accordance with the chassis manufacturer's standards. Note: Rear tow eyes are addressed in the Bus Body Specifications under Towing Attachment Points.
- e. The bumper shall be designed or reinforced so that it will not deform when the bus is lifted by a chain that is passed under the bumper (or through the bumper if holes are provided for this purpose) and attached to both tow eyes. To meet this standard, the bus shall be empty and positioned on a level, hard surface and both tow eyes shall share the load equally.
- f. Bumper Accessories (Grill Guards): Any addition to the front bumper such as grill guards shall not hinder or obstruct (FMVSS requirements) mirrors, signals, lights and/or license plates. The addition shall be painted flat black. The addition shall not be so substantial that it changes the [Gross Vehicle Weight Rating \(GVWR\)](#). The addition of a grill guard is prohibited on Type A buses.

### 2. Front Bumpers – Energy Absorbing

- a. On a Type "D" school bus, if the chassis manufacturer does not provide a bumper, it shall be provided by the body manufacturer. The bumper will conform to the standards in the chassis section.
- b. An optional energy-absorbing front bumper may be used, providing its design shall incorporate a self-restoring energy-absorbing system of sufficient strength to:
  - i. Push another vehicle of similar GVWR without permanent distortion to the bumper, chassis, or body; and
  - ii. Withstand repeated impacts without damage to the bumper, chassis, or body per the following performance standards:
    - 7.5 mph fixed-barrier impact (FMVSS cart and barrier test)
    - 4.0 mph corner impact at 30 degrees (Part 581, CFR Title 49)
    - 20.0 mph into parked passenger car (Type B, C, and D buses of 18,000 lbs. GVWR or more)
- c. The manufacturers of the energy-absorbing system shall provide evidence from an approved test facility (capable of performing the above FMVSS tests) that their product conforms to the above standard.

### 3. Rear Bumpers

- a. The bumper shall be pressed steel channel at least 3/16-inch-thick or equivalent strength material (except for Type A buses). Type A-1 buses bumper shall be a minimum of 8 inches wide (high) and Type A-2, B, C and D buses shall be a minimum of 9.5 inches wide (high). The bumper shall be of sufficient strength to permit being pushed by another vehicle without permanent distortion.
- b. The bumper shall be wrapped around back corners of the bus. It shall extend forward at least 12 inches, measured from the rear-most point of the body at the floor line and shall be flush mounted to body side or protected with an end panel.
- c. The bumper shall be attached to the chassis frame in such a manner that it may be easily removed. It shall be so braced as to withstand impact from a rear or side impact. It shall be so attached as to discourage hitching of rides.
- d. The bumper shall extend at least 1 inch beyond rear-most part of body surface measured at the floor line.
- e. The bottom of the rear bumper shall not be more than 30 inches above ground level.

### CEILING

See ~~INSULATION and INTERIOR~~. This specification requires inner lining on ceilings and walls. If the ceiling is constructed with lap joints, the forward panel shall be lapped by rear panel and exposed edges shall be beaded, hemmed, flanged or otherwise treated to minimize sharp edges. Buses may be equipped with a storage compartment for tools, tire chains and/or tow chains. (See BUS BODY AND BODY SPECIFICATIONS, Storage Compartment.)

### CERTIFICATION

1. Body manufacturer shall, upon request, certify to the state agency having pupil transportation jurisdiction that their product meets state standards on items not covered by certification issued under requirements of the National Traffic and Motor Vehicle Safety Act.
2. The chassis manufacturer will, upon request, certify to the state agency having pupil transportation jurisdiction that their product meets minimum standards on items not covered by certification issued under requirements of the National Traffic and Motor Vehicle Safety Act.

### CHAINS/TIRE

See WHEEL HOUSING.

### COLOR

1. The chassis, including wheels and front bumper, shall be black. The Bus body, body cowl, hood, and fenders shall be in National School Bus Yellow (NSBY). The flat top surface of the hood may be non-reflective black or NSBY. ~~(See APPENDIX B – NATIONAL SCHOOL TRANSPORTATION SPECIFICATION AND PROCEDURES.)~~
2. The body exterior paint trim, bumper and bumper accessories, lamp hoods, rub rails, and emergency door lettering and arrow shall be black. The full width of the rub rails shall be painted black.
3. Optionally the roof of the bus may be painted white extending down to the drip rails on the sides of the body except that front and rear roof caps shall remain NSBY.
4. ~~Multi-Function School Activity Buses (MFSABs)~~ shall be exempt from these color requirements.

### CONSTRUCTION

1. Side Intrusion Test: The bus body shall be constructed to withstand an intrusion force equal to the curb weight of the vehicle; but shall not exceed 20,000 pounds, whichever is less. Each vehicle shall meet this requirement when tested in accordance with the procedures set forth below.
  - a. The complete body structure, or a representative seven-body section mock up with seats installed, shall be load-tested at a location 24 inches plus or minus two inches above the floor line, with a maximum

- 10-inch diameter cylinder, 48 inches long, mounted in a horizontal plane.
- b. The cylinder shall be placed as close as practical to the mid-point of the tested structure, spanning two internal vertical structural members. The cylinder shall be statically loaded to the required force of curb weight or 20,000 pounds, whichever is less, in a horizontal plane with the load applied from the exterior toward the interior of the test structure. Once the minimum load has been applied, the penetration of the loading cylinder into the passenger compartment shall not exceed a maximum of 10 inches from its original point of contact. There can be no separation of lapped panels or construction joints. Punctures, tears or breaks in the external panels are acceptable but are not permitted on any adjacent interior panel.
  - c. Body companies shall certify compliance with this intrusion requirement, including test results, if requested.
2. Construction shall be reasonably dust-proof and watertight.

#### CROSSING CONTROL ARM

1. All school buses manufactured on/after January 1, 2010 may be equipped with a crossing control arm mounted on the right side of the front bumper. This arm, when opened, shall extend in a line parallel with the body side and positioned on a line with the right-side wheels.
2. All electrical components of the crossing control arm shall be potted and all exterior connections shall be weatherproofed.
3. The crossing control arm shall incorporate system connectors (electrical, vacuum, or air) at the gate and shall be easily removable to allow for towing of the bus.
4. The crossing control arm shall meet or exceed SAE Standard J1133.
5. The crossing control arm shall be constructed of noncorrosive or nonferrous material or treated in accordance with the body sheet metal standard (see METAL TREATMENT)
6. There shall be no sharp edges or projections that could cause hazard or injury to students.
7. The crossing control arm shall extend approximately 70 inches (measured from the bumper at the arm assembly attachment point) from the front bumper when in the extended position. The crossing control arm shall not extend past the end of the bumper when in the stowed position.
8. The crossing control arms shall extend simultaneously with the stop arm(s) by means of the stop arm controls.
9. An automatic recycling interrupt switch should be installed for temporary disabling of the crossing control arm.
10. The assembly shall include a device attached to the bumper near the end of the arm to automatically retain the arm while in the stowed position. That device shall not interfere with normal operations of the crossing control arm.

#### DEFROSTERS

1. Defrosting and defogging equipment shall direct a sufficient flow of heated air onto the windshield, the window to the left of the driver, and the glass in the viewing area directly to the right of the driver to eliminate frost, fog and snow.
2. The defrosting system shall conform to SAE standards J381 and J382.
3. The defroster and defogging system shall be capable of furnishing heated outside ambient air, except the part of the system furnishing additional air to the windshield; entrance door and step well may be of the recirculating air type.
4. Portable heaters shall not be used.

#### DOORS

1. A primary entrance door shall be in the driver's control, and designed to afford easy release and provide a positive latching device on manual operating doors to prevent accidental opening. When a hand lever is used, no part shall come together that will shear or crush fingers. Manual door controls shall not require

more than 25 pounds of force to operate at any point throughout the range of operation as tested on a 10 percent grade both uphill and downhill.

2. The primary entrance door shall be located on the right side of the bus, opposite and within direct view of the driver.
  - a. The entrance door shall have a minimum horizontal opening of 24 inches and a minimum vertical opening of 68 inches.
  - b. The entrance door shall be a split-type, outward opening type. (Split-type door includes any sectioned door, which divides and opens inward or outward.) If one section of a split-type door opens inward and the other opens outward, the front section shall open outward.
  - c. Lower, as well as, upper door panels shall be of approved safety glass with frost-free glazing. The bottom of each lower glass panel shall not be more than 10 inches from the top surface of the bottom step. The top of each upper glass panel when viewed from the interior shall not be more than three inches below the interior door control cover or header pad.
  - d. Vertical closing edges on split-type or folding-type entrance doors shall be equipped with flexible material to protect children's fingers.
  - e. There shall be no door to left of driver on Type B, C or D vehicles. All Type A vehicles may be equipped with chassis manufacturer's standard door.
  - f. All doors shall be equipped with padding at the top edge of each door opening. Padding shall be at least three inches wide and one inch thick and extend the full width of the door opening.
    - i. On power-operated entrance doors, the emergency release valve, switch or device to release the service door must be placed above or to the immediate left or right of the service door and clearly labeled. The emergency release valve, switch or device shall work in the absence of power.

#### DRIVE SHAFT

The drive shaft shall be protected by a metal guard or guards around the circumference of the drive shaft to reduce the possibility of whipping through the floor or dropping to the ground if broken.

#### ELECTRICAL SYSTEM

1. Battery
  - a. The storage battery shall have minimum cold cranking capacity rating equal to the cranking current required for 30 seconds at 0 degrees Fahrenheit (-17.80 C) and a minimum reserve capacity rating of 120 minutes at 25 amps. Higher capacities may be required depending upon optional equipment and local environmental conditions depending upon manufactures recommendations.
  - b. The manufacturer shall securely attach the battery on a slide-out or swing-out tray in a closed, vented compartment in the body skirt or chassis frame so that the battery is accessible for convenient servicing from the outside. When in the stored position, the tray shall be retained by a securing mechanism capable of holding the tray [with battery (ies)] in position when subjected to a 5g load from any direction. The battery compartment door or cover if separate from the tray shall be hinged at the front. It shall be secured by a positive operated latching system or other type fastener. The door may be an integral part of the battery slide tray. The door or cover must fit tightly to the body, and not present sharp edges or snagging points. Any chassis frame mounted batteries shall be located in a battery compartment on Type A buses.
  - c. All batteries are to be secured in a sliding tray except that van conversion or cutaway front-section chassis batteries may be secured in accordance with the manufacturer's standard configuration. In these cases, the final location of the battery and the appropriate cable lengths shall be per the SBMI Design Objectives Booklet, 1990 edition, or as mutually agreed upon by the chassis and body manufacturer. In all cases, however, the battery cable provided with the chassis shall have sufficient length to allow some slack.
  - d. Buses may be equipped with a battery shut-off switch. The switch is to be placed in a location not

readily accessible to the driver or passengers.

## 2. Alternator

- a. All Type A and Type B buses with a GVWR up to 15,000 lbs. GVWR shall have a minimum 130-ampere alternator. Buses equipped with an electrically powered wheelchair lift and/or air conditioning shall be equipped with the highest rated capacity available from the chassis OEM.
- b. All buses over 15,000 lbs. GVWR shall be equipped with a heavy-duty truck or bus-type alternator, having a minimum output rating of 160 200 amperes or higher and shall produce a minimum current output of 50 percent of the rating at engine idle speed.
- c. Buses not addressed in (a) above equipped with an electrically powered wheelchair lift and/or air conditioning, shall have a minimum alternator output of 240 amps and may be equipped with a device that monitors the electrical system voltage and advances the engine idle speed when the voltage drops to, or below, a pre-set level.
- d. A belt alternator drive shall handle the rated capacity of the alternator with no detrimental effect on other driven components. (See GLOSSARY OF TERMS AND DEFINITIONS).
- e. A direct/gear-drive alternator is permissible in lieu of belt drive.

## 3. Electrical Components

- a. a. Materials in all electrical components shall contain no mercury.

## 4. Wiring, Chassis

- a. All wiring shall conform to current applicable recommended practices of the Society of Automotive Engineers (SAE).
- b. All wiring shall use color and at least one other method of identification. The other method shall be either a number code or name code, and each chassis shall be delivered with a wiring diagram that illustrates the wiring of the chassis.
- c. Chassis manufacturer shall install a readily accessible terminal strip or plug on the body side of the cowl, or in an accessible location in the engine compartment of vehicles designed without a cowl. The strip or plug shall contain the following terminals for the body connections:
  - i. Main 100-amp body circuit;
  - ii. Tail-lamps;
  - iii. Right-turn signal;
  - iv. Left-turn signal;
  - v. Stop lamps;
  - vi. Backup lamps; and
  - vii. Instrument panel lights (rheostat controlled by dimmer switch).
  - viii. An appropriate identifying diagram (color and number coded) for electrical circuits shall be provided to the body manufacturer for distribution to the end user.
  - ix. Headlight system must be wired separately from the body-controlled solenoid.
  - x. A daytime running lamps system shall be provided.

## 5. Wiring, Body

- a. All wiring shall conform to current SAE Sstandards.
- b. All wiring shall have an amperage capacity exceeding the design load by at least 25%. All wiring splices are to be accessible and noted as splices on the wiring diagram.
- c. A body wiring diagram, sized to be easily read, shall be furnished with each bus body or affixed to an area convenient to the electrical accessory control panel.
- d. The body power wire shall be attached to the special terminal on the chassis.
- e. Each wire passing through metal openings shall be protected by a grommet.
- f. Wires not enclosed within the body shall be fastened securely at intervals of not more than 18 inches. All joints shall be soldered or joined by equally effective connectors, which shall be water- resistant and corrosion-resistant.
- g. Wiring shall be arranged in circuits, as required, with each circuit protected by a fuse or circuit breaker.



A system of color and number coding shall be used and an appropriate identifying diagram shall be provided to the end user along with the wiring diagram provided by the chassis manufacturer. The wiring diagrams shall be specific to the bus model supplied and include any changes to wiring made by the body manufacturer. Chassis wiring diagrams shall also be supplied to the end user. A system of color and number coding shall be used on buses. The following body interconnecting circuits shall be color-coded as noted:

| <u>FUNCTION</u>              | <u>COLOR</u> |
|------------------------------|--------------|
| Left Rear Directional Light  | Yellow       |
| Right Rear Directional Light | Dark Green   |
| Stoplights                   | Red          |
| Back-up Lights               | Blue         |
| Taillights                   | Brown        |
| Ground                       | White        |
| Ignition Feed, Primary Feed  | Black        |

- i. The color of cables shall correspond to SAE J 1128, Low-Tension Primary Cable.
- ii. Wiring shall be arranged in at least six regular circuits as follows:
  - Head, tail, stop (brake) clearance and instrument panel lamps;
  - Step well lamps (shall be actuated when service door is opened);
  - Dome lamps;
  - Ignition and emergency door signal;
  - Turn signal lamps; and
  - Alternately flashing signal lamps.
  - Any of the above combination circuits may be subdivided into additional independent circuits.
  - Heaters and defrosters shall be wired on an independent circuit.
  - When possible, all other electrical functions (such as sanders and electric-type windshield wipers) shall be provided with independent and properly protected circuits.
  - Each body circuit shall be coded by number or letter on a diagram of circuits and shall be attached to the body in a readily accessible location.
- h. Buses may be equipped with a 12-volt power port in the driver's area.
- i. There shall be a manual noise suppression switch installed in the control panel. The switch shall be labeled and alternately colored. This switch shall be an on/off type that deactivates body equipment that produces noise, including, at least, the AM/FM radio, heaters, air conditioners, fans and defrosters. This switch shall not deactivate safety systems, such as windshield wipers or lighting systems.
- j. The entire electrical system of the body shall be designed for the same voltage as the chassis on which the body is mounted.

## EMERGENCY EXITS

All installed emergency exits shall comply with the requirements of FMVSS No. 217.

1. Emergency door requirements
  - a. The exposed area of the upper panel of emergency doors shall have a minimum of 400 square inches of approved safety glazing.
  - b. If installed, all other glass panels on emergency doors shall be approved safety glazing.
  - c. There shall be no steps leading to an emergency door.
  - d. The emergency door(s) shall be equipped with padding at the top edge of each door opening. Padding shall be at least three inches wide and 1 inch thick, and extend the full width of the door opening.
  - e. There shall be no obstruction higher than 1/4 inch across the bottom of any emergency door opening. Fasteners used within the emergency exit opening shall be free of sharp edges or burrs.
  - f. The rear emergency window shall have an assisted lifting device that will aid in lifting and holding the rear emergency window open.

2. Roof hatches
  - a. Roof hatches shall be installed without the use of fasteners on the exterior of the bus.
  - b. The materials used in the construction of the exterior portion of the roof hatch lid shall be such type as to protect the lid from discoloration and degradation from the UV light.
3. Emergency exit requirements
  - a. Type A, B, C, and D vehicles shall be equipped with a total number of emergency exits as follows for the indicated capacities of vehicles.
    - i. 0 to 42 Passengers = 1 emergency exit per side and 1 roof hatch.
    - ii. 43 to 78 Passengers = 2 emergency exits per side and 2 roof hatches.
    - iii. 79 to 90 Passengers = 3 emergency exits per side and 2 roof hatches.
  - b. Side emergency exit windows when installed may be vertically hinged on the forward side of the window. No side emergency exit window will be located above the stop arm.
  - c. Each emergency exit above shall comply with FMVSS [No. 217](#). The emergency exits listed in 3 a above are in addition to the rear emergency door or rear emergency window.
  - d. In addition to the audible warning required on emergency doors by FMVSS [No. 217](#), additional emergency exits may also be equipped with an audible warning device.

#### ELECTRICAL VEHICLE CHARGING PORT

1. The high-voltage batteries shall be equipped with a system that allows the batteries to be charged via a connection to the local electrical utility grid. This connection shall be a Combined Charging System (CCS), North American Charging Standard (NACS), or SAE J1772, compatible with the charging equipment.
2. The charging receptacle/port shall be mounted/located in accordance with the manufacturer standards. The receptacle shall accommodate the minimum requirements for Level II AC charging and DC fast charging.

#### ELECTRICAL VEHICLE DC-DC CONVERTER

1. A DC-DC converter shall be provided and deliver a minimum of 200 amps at 12 VDC.
2. The converter system shall incorporate a Ground Fault Interrupt (GFI) that disconnects/isolates the high-voltage batteries in the event of a short circuit or water intrusion.

#### ELECTRICAL VEHICLE HIGH-VOLTAGE SYSTEM

High Voltage-Powered Vehicles: Buses utilizing a high voltage propulsion system (60 VDC or 30 VAC) shall comply with the following:

1. The propulsion power source (batteries, fuel cells, etc.) shall be located outside the passenger compartment.
2. The propulsion power source enclosure shall be constructed to conform to the power source manufacturer's requirements and recommendations.
3. Wire, cable, and conductor insulation in the High Voltage System shall provide adequate insulation for the voltage used and for ambient temperatures ranging from -15°F to 120°F. All high voltage wiring/cabling shall be covered with bright orange loom or otherwise labeled as HIGH VOLTAGE.
4. All high voltage circuits shall provide adequate and automatic protection against electrical overload caused by short circuits or other excessive current conditions using fuses, circuit breakers, and ground fault interruption.
5. Each door, cover, or other panel that affords immediate access to any high voltage area shall be plainly marked with a hazard warning label which shall read WARNING—HIGH VOLTAGE or DANGER—HIGH VOLTAGE. This label shall be in a highly conspicuous place.
6. All high voltage access areas shall be secured to deter unauthorized access.

#### ELECTRIC VEHICLE IDENTIFICATION LABEL

1. Each Electric Vehicle school bus shall be identified with a permanent, diamond-shaped label located on the

exterior vertical surface or near-vertical surface on the lower right rear of the school bus other than on the bumper of the vehicle.

2. The label shall be a minimum of 4.7 inches long x 3.0 inches high.
3. The marking in the label shall consist of a blue colored background, a border, and the letters "EV", one inch in height with the lightning bolt in the center.
4. In addition to the location on the right rear, labels shall be affixed to each side of the school bus, rear of the entrance door and beneath the driver's window.
5. Battery disconnect label:
  - a. A permanent label with black one-inch letters shall identify the location(s) of the battery disconnect switch or device.
  - b. Any instructions may be printed adjacent to the switch or device in letters ½ inch high.

#### ELECTRIC VEHICLE IGNITION SYSTEM

1. The ignition switch circuit shall be linked to the Battery Management System and shall prevent the driving of the vehicle while it is connected to an external battery charging source.
2. The high voltage system shall be designed so that when the ignition switch is off, the high voltage is disconnected.

#### ELECTRIC VEHICLE REGENERATIVE BRAKES

In addition to service brake specifications for combustion engine buses, Electric Vehicles shall be equipped with regenerative braking that utilizes the electric drive system in concert with the service brakes to slow the vehicle and return electrical energy to the battery system.

#### ELECTRIC VEHICLE SYSTEM PROTECTION

1. As part of the Battery Management System, Electric Vehicles shall be equipped with an automatic shutdown to protect system components from damage caused by malfunctions such as charging/discharging faults, battery overheating, electrical overheating, degraded battery health, etc.
2. Prior to automatic shutdown, a warning or maintenance indicator shall display in the driver's console to notify the driver of impending shutdown or the need for immediate maintenance and allow enough time to safely reposition and stop the bus. Gradual derating of propulsion shall occur prior to complete automatic shutdown

#### EMERGENCY EQUIPMENT

1. Fire Extinguisher
  - a. The bus shall be equipped with at least one five-pound or greater UL-approved pressurized, dry chemical fire extinguisher ~~complete with hose~~. The extinguisher shall be mounted (and secured) in a bracket, located in the driver's compartment (shall not be in a closed compartment) and readily accessible to the driver and passengers, unless in a Type E school bus.
  - b. ~~The extinguisher shall be mounted (and secured) in a bracket, located in the driver's compartment (shall not be in a closed compartment) and readily accessible to the driver and passengers with the exception of Type E schools buses.~~ Type E school buses must have a fire extinguisher available in a secured bracket and accessible by the driver. This may include the trunk of a vehicle.
  - ~~c. A pressure gauge shall be mounted on the extinguisher and be easily read without moving the extinguisher from its mounted position.~~
  - ~~d.c.~~ The fire extinguisher shall have a total rating of 2-A:10-BC or greater. The operating mechanism shall be sealed with a type of seal that will not interfere with the use of the fire extinguisher.
  - ~~e. A Halon extinguisher may be carried in addition to the dry chemical extinguisher.~~
2. First-Aid Kit
  - a. The bus shall have a removable moisture-proof and dust-proof first-aid kit in an accessible place in the driver's compartment. It shall be properly mounted and secured and identified as a first-aid kit.

b. Contents of first-aid kit shall follow state standards and shall include but is not limited to:

- i. 2 - 1" x 2.5 yards adhesive tape rolls
- ii. 24 - sterile gauze pads 3" x 3"
- iii. ~~10020~~ - 3/4" x 3" adhesive bandages
- iv. 8 - 2" bandage compress
- v. 10 - 3" bandage compress
- vi. 2 - 2" x 6' sterile gauze roller bandages
- vii. 2 - non-sterile triangular bandages approximately 40" x 36" x 54" with 2 safety pins
- viii. 3 - sterile gauze pads 36" x 36"
- ix. 2 - sterile eye pads
- x. 1 - rounded-end scissors
- xi. pair medical examination gloves
- xii. 1 - mouth-to-mouth airway

~~c. The Inspection Form must be completed and stored with the TR-13 form on the school bus.~~

~~c. School buses purchased on or before January 2027 shall only be required to include 20 - 3/4" x 3" adhesive bandages in the First-Aid Kit.~~

~~d. See Table 1 for inspection form~~

| <b>Table 1—FIRST AID KIT INSPECTION FORM</b>                      |              |                 |              |                 |              |                 |
|-------------------------------------------------------------------|--------------|-----------------|--------------|-----------------|--------------|-----------------|
| <b>First Aid Kit</b>                                              | <b>Year:</b> |                 | <b>Year:</b> |                 | <b>Year:</b> |                 |
|                                                                   | <b>Good</b>  | <b>Replaced</b> | <b>Good</b>  | <b>Replaced</b> | <b>Good</b>  | <b>Replaced</b> |
| <del>2 - 1" x 2.5 yards adhesive tape rolls</del>                 |              |                 |              |                 |              |                 |
| <del>24 - sterile gauze pads 3" x 3"</del>                        |              |                 |              |                 |              |                 |
| <del>20 - 3/4" x 3" adhesive bandages</del>                       |              |                 |              |                 |              |                 |
| <del>8 - 2" bandage compress</del>                                |              |                 |              |                 |              |                 |
| <del>10 - 3" bandage compress</del>                               |              |                 |              |                 |              |                 |
| <del>2 - 2" x 6' gauze roller bandages</del>                      |              |                 |              |                 |              |                 |
| <del>2 - non-sterile triangular bandages with 2 safety pins</del> |              |                 |              |                 |              |                 |
| <del>3 - sterile gauze pads 36" x 36"</del>                       |              |                 |              |                 |              |                 |
| <del>3 - sterile eye pads</del>                                   |              |                 |              |                 |              |                 |
| <del>1 - rounded-end scissors</del>                               |              |                 |              |                 |              |                 |
| <del>1 - pair medical examination gloves</del>                    |              |                 |              |                 |              |                 |
| <del>1 - mouth to mouth airway</del>                              |              |                 |              |                 |              |                 |
| <b>Inspected by:</b>                                              |              |                 |              |                 |              |                 |
| <b>School Transportation Supervisor</b>                           |              |                 |              |                 |              |                 |
| <b>Sign:</b>                                                      |              |                 |              |                 |              |                 |
| <b>Date:</b>                                                      |              |                 |              |                 |              |                 |

### 3. Body Fluid Clean-up Kit

a. Each bus shall have a removable and moisture-proof body fluid clean-up kit accessible to the driver. It shall be properly mounted and identified as a body fluid clean-up kit. This standard shall apply retroactively to all Montana school buses.

b. Contents of body fluid clean-up kit shall follow state standards and shall include but is not limited to:

- i. 2 - Sterile non-latex Gloves - 1 pr
- ii. 1 - Red Bio-hazard Waste Bag w/tie

- iii. 1 — Black/brown Plastic Bag w/tie
- iv. 1 - Liquid Treatment System – ¾ oz
- v. 2 - Disposable Microbial Towels
- vi. 2 - Antiseptic Microbial Wipe
- vii. 1 - Face Mask with Eye Shield
- viii. 1 - Pick up Scoop with Scraper
- ix. 1 - Surface Cleaning Wipe
- x. #10 Unit Poly White Storage Box
- xi. ~~See Table 2 for Inspection Form~~

c. ~~The A First-Aid Kit Inspection Form and Body Fluid Clean-up Kit Inspection Form~~ must be completed and stored with the TR-13 form on the school bus.

d. ~~See Table 2 for inspection form.~~

| <del>Table 2—BODY FLUIDS CLEAN-UP INSPECTION FORM</del> |                  |                     |                  |                     |                  |                     |
|---------------------------------------------------------|------------------|---------------------|------------------|---------------------|------------------|---------------------|
| <del>Body Fluid Clean-Up Kit</del>                      | <del>Year:</del> |                     | <del>Year:</del> |                     | <del>Year:</del> |                     |
|                                                         | <del>Good</del>  | <del>Replaced</del> | <del>Good</del>  | <del>Replaced</del> | <del>Good</del>  | <del>Replaced</del> |
| <del>2—sterile non-latex gloves—1 pair</del>            |                  |                     |                  |                     |                  |                     |
| <del>1—red bio-hazard waste bag w/tie</del>             |                  |                     |                  |                     |                  |                     |
| <del>1—black/brown plastic bag w/tie</del>              |                  |                     |                  |                     |                  |                     |
| <del>1—liquid treatment system—3/4 oz.</del>            |                  |                     |                  |                     |                  |                     |
| <del>2—disposable microbial wipe</del>                  |                  |                     |                  |                     |                  |                     |
| <del>1—face mask with eye shield</del>                  |                  |                     |                  |                     |                  |                     |
| <del>1—pick up scoop with scraper</del>                 |                  |                     |                  |                     |                  |                     |
| <del>1—surface cleaning wipe</del>                      |                  |                     |                  |                     |                  |                     |
|                                                         |                  |                     |                  |                     |                  |                     |
| <del>Inspected by:</del>                                |                  |                     |                  |                     |                  |                     |
| <del>School Transportation Supervisor</del>             |                  |                     |                  |                     |                  |                     |
| <del>Sign:</del>                                        |                  |                     |                  |                     |                  |                     |
| <del>Date:</del>                                        |                  |                     |                  |                     |                  |                     |

#### 4. Warning Devices

- a. Each school bus shall contain at least three (3) reflectorized triangle road warning devices mounted in an accessible place that meet requirements in FMVSS No. 125.
- b. Any of the emergency equipment may be mounted in an enclosed compartment, provided the compartment is labeled in not less than ~~one inch~~one-inch letters, identifying each piece of equipment contained therein.

#### EXHAUST SYSTEM (FOR INTERNAL COMBUSTION ENGINES ONLY)

- 1. The exhaust pipe, muffler, after treatment system and tailpipe shall be outside the bus body compartment and attached to the chassis so as not to damage any other chassis compartment. Entire system shall be free of leaks.
- 2. The tailpipe and after treatment system shall be constructed of a corrosion-resistant tubing material at least equal in strength and durability to 16-gauge steel tubing of equal diameter.
- 3. The tailpipe may be flush with, or shall not extend more than 2 inches beyond, the perimeter of the body for side-exit pipe or the bumper for the rear-exit pipe. The exhaust system shall be designed such that exhaust gas will not be trapped under the body of the bus.
- 4. The tailpipe shall exit to the left or right of the emergency exit door in the rear of the vehicle or to the left side of the bus in front of or behind the rear drive axle. The tailpipe may extend through the bumper. The

tailpipe exit location on all Types A-1 or B-1 buses may be in accordance to the manufacture's standards. The tailpipe shall not exit beneath any fuel filler location.

5. Exhaust system on a chassis shall be adequately insulated from the fuel system.
6. Muffler shall be constructed of corrosion-resistant material.
7. The exhaust system on vehicles equipped with a power lift unit may be routed to the left of the right frame rail to allow for the installation of a power lift unit on the right side of the vehicle.

#### FENDERS, FRONT

1. Total spread of outer edges of front fenders, measured at fender line, shall exceed total spread of front tires when front wheels are in straight-ahead position.
2. Front fenders shall be properly braced and shall not require attachment to any part of the body.

#### FLOORS

1. Floor in under-seat area, including tops of wheel housing, driver's compartment and toe board, shall be covered with rubber floor covering or equivalent, having a minimum overall thickness of .125 inch and a minimum slip coefficient of .75 or better. All materials must meet a calculated burn rate of 0.1 mm per minute or less as required by FMVSS No. 302, Flammability of Interior Materials. The driver's area and toe board area on all Type-A buses may be manufacturer's standard flooring and floor covering.
2. Floor covering in aisles shall be of aisle-type rubber or equivalent, wear-resistant, ribbed and a minimum slip coefficient of .75 or better. All materials must meet a calculated burn rate of 0.1 mm per minute or less as required by FMVSS No. 302, Flammability of Interior Materials. Minimum overall thickness shall be .187 inch measured from tops of ribs.
3. Floor covering must be permanently bonded to floor and must not crack when subjected to sudden changes in temperature. Bonding or adhesive material shall be waterproof and shall be a type recommended by the manufacturer of floor-covering material. All seams must be sealed with waterproof sealer.
4. On Type B, C and D buses a flush-mounted, screw-down plate that is secured and sealed shall be provided to access the diesel or gasoline fuel tank sending unit and/or fuel pump. This plate shall not be installed under flooring material.

#### FRAME

1. The frame (or equivalent) shall be of such design and strength characteristics as to correspond at least to standard practices for trucks of the same general load characteristics which are used for highway service.
2. Any secondary manufacturer that modifies the original chassis frame shall guarantee the performance of workmanship and materials resulting from such modification.
3. Frames shall not be modified to extend the wheelbase.
4. Holes in top or bottom flanges or side units of the frame, and welding to the frame, shall not be permitted except as provided or accepted by chassis manufacturer.
5. Frame lengths shall be established in accordance with design criteria for the complete vehicle.
6. There shall be no trailer hitches, ball or pin type, attached to buses.

#### FUEL SYSTEM (FOR INTERNAL COMBUSTION ENGINES ONLY)

1. Fuel tank or tanks having a minimum 25-gallon capacity shall be provided by the chassis manufacturer. The tank shall be filled and vented to the outside of the body, in a location where accidental fuel spillage will not drip or drain on any part of the exhaust system.
2. No portion of the fuel system, which is located outside of the engine compartment, except the filler tube, shall extend above the top of the chassis frame rail. Fuel lines shall be mounted to obtain maximum possible protection from the chassis frame.
3. Fuel filter with replaceable element shall be installed between the fuel tank and engine.
4. The fuel system shall comply with FMVSS No. 301 and all [Federal Motor Vehicle Safety Standards FMVSS](#) in



effect on the date of manufacture of the bus.

5. Fuel tank(s) may be mounted between the chassis frame rails or outboard of the frame rails on either the left or right side of the vehicle.
6. The actual draw capacity of each fuel tank shall be 83 percent of the tank capacity.
7. Installation of alternative fuel systems, including fuel tanks and piping from tank to engine, shall comply with all applicable fire codes and applicable Federal Motor Vehicle Safety Standards FMVSS in effect on the date of manufacture of the bus.
8. Installation of Liquefied Petroleum Gas (LPG) tanks shall comply with National Fire Protection Association (NFPA) 58, Liquefied Petroleum Gas Code.
9. Installation of Compressed Natural Gas (CNG) containers shall comply with FMVSS No. 304, Compressed Natural Gas Fuel Container Integrity.
10. The CNG Fuel System shall comply with FMVSS No. 303, Fuel System Integrity of Compressed Natural Gas Vehicles.
11. For after treatment systems that require Diesel Exhaust Fluid (DEF) to meet federally mandated emissions:
  - a. The composition of Diesel Exhaust Fluid (DEF) must comply with International Standard ISO 22241-1. Refer to engine manufacturer for any additional DEF requirements.
  - b. The DEF supply tank shall be designed to meet a minimum ratio of 3 diesel fills to 1 DEF fill.

#### GOVERNOR

When the engine is remotely located from the driver, the governor shall be set to limit engine speed to maximum revolutions per minute recommended by engine manufacturer, and a tachometer shall be installed so the driver while seated in a normal driving position may know the engine speed.

#### HANDRAILS

~~At least one handrail shall be installed~~A handrail shall be installed on the left and right sides of the stepwell. The handrails shall be a minimum of 1" diameter and be constructed from corrosion resistant material(s). The handrails~~(s)~~ shall assist passengers during entry or exit, and be designed to prevent entanglement, as evidenced by the passage-passing of the NHTSA string and nut test.

#### HEATING SYSTEM PROVISION (FOR INTERNAL COMBUSTION ENGINES ONLY)

1. The engine shall supply water having a temperature of at least 170 degrees Fahrenheit at a flow rate of 50 pounds per minute at the return end of 30 feet of one inch inside diameter automotive hot water heater hose. (SBMI Standard No. 001—Standard Code for Testing and Rating Automotive Bus Hot Water Heating and Ventilating Equipment)
2. Heater hose in the engine compartment and between the engine and the driver shutoff, or the first body heater, whichever comes first, shall be armored or reinforced hose such as Goodyear Hi Miler, or equivalent.

#### HEATING AND AIR CONDITIONING SYSTEMS

1. The heater shall be hot-water combustion type, electric heating element, or heat pump.
2. If only one heater is used, it shall be fresh-air or combination fresh-air and recirculating type.
3. If more than one heater is used, additional heaters may be recirculating air type.
4. The heating system shall maintain bus interior temperatures as specified in SAE test procedure J2233.
5. Auxiliary fuel-fired heating systems are permitted, provided they comply with the following:
  - a. Except for electronic-powered school buses, ~~T~~the auxiliary heating system fuel shall utilize the same type fuel as specified for the vehicle engine.
  - b. Heater(s) may be direct hot air or connected to the engine's coolant system.
  - c. Auxiliary heating system, when connected to the engine's coolant system, may be used to preheat the engine coolant or preheat and add supplementary heat to the bus's heating system.
  - d. Auxiliary heating systems must be installed pursuant to the manufacturer's recommendations and

shall not direct exhaust in such a manner that will endanger bus passengers and follow the existing guidelines of the exhaust system section of these standards.)

- e. Auxiliary heating systems, which operate on diesel fuel, shall operate on No. 1, No. 2 or blended diesel fuel without the need for system adjustment.
  - f. The auxiliary heating system shall be low voltage; and
  - g. Auxiliary heating systems shall comply with all applicable [Federal Motor Vehicle Safety Standards FMVSS](#), including FMVSS [No. 301](#), Fuel System Integrity, and all other applicable FMVSS's, as well as with SAEJ2233 test procedures.
- 6. All forced air heaters installed by body manufacturers shall bear a nameplate that indicates the heater rating in accordance with SBMI Standard No. 001 Standard Code for Testing and Rating Automotive Bus Hot Water Heating and Ventilating Equipment. The plate shall be affixed by the heater manufacturer and shall constitute certification that the heater performance is as shown on the plate.
  - 7. Heater hoses shall be adequately supported to guard against excessive wear due to vibration. The hoses shall not dangle or rub against the chassis or any sharp edges and shall not interfere with or restrict the operation of any engine function. Heater hoses shall conform to SAE Standard J20c, Coolant System Hoses. Heater lines, cores and elements on the interior of bus shall be shielded to prevent scalding or burning of the driver or passengers.
    - a. The heater hose in the engine compartment and between the engine and the driver shutoff, or the first body heater, whichever comes first, shall be armored or reinforced hose such as Goodyear Hi Miler, or equivalent.
  - 8. Each hot water system installed by a body manufacturer shall include one shut-off valve in the pressure line and one shut-off valve in the return line with both valves at the engine in an accessible location, except that on all Type A and B buses, the valves may be installed in another accessible location.
  - 9. All heaters of hot water type in the passenger compartment shall be equipped with a device, installed in the hot water pressure line, which regulates the water flow to all passenger heaters. The device shall be conveniently operated by the driver while seated. The driver and passenger heaters may operate independently of each other for maximum comfort.
  - 10. All combustion heaters shall follow current Federal Motor Carrier Safety Regulations.
  - 11. Accessible bleeder valves of hot water type systems, shall be installed in an appropriate place in the return lines of body company installed heaters to remove air from the heater lines.
  - 12. Access panels shall be provided to make heater motors, cores, elements, and fans readily accessible for service. Outside access panel may be provided for the driver's heater.

*Passenger compartment Air Conditioning (Optional) Specific requirements are listed in the National Standards.*

## HORN

Bus shall be equipped with horn or horns of standard make with each horn capable of producing a complex sound in bands of audio frequencies between 250 and 2,000 cycles per second and tested in accordance with SAE J-377, Horn-Forward Warning-Electric-Performance, Test, and Application.

## HINGES

Exposed metal emergency door, lift door, and service door hinges which do not have stainless steel, brass or nonmetallic hinge pins or other design that prevents corrosion or allows complete lubrication without disassembly, shall be designed to allow complete lubrication to be channeled to the center 75 percent of each hinge loop.

## IDENTIFICATION

- 1. Body shall bear words "SCHOOL BUS" in black letters at least 8 inches high on both front and rear of body or on signs attached thereto. Lettering shall be placed as high as possible without impairment of its visibility. Letters shall conform to "Series B" of Standard Alphabets for highway signs. "SCHOOL BUS" lettering shall have a reflective background, or as an option, may be illuminated by backlighting. (See

#### RETRO-REFLECTIVE MATERIAL.)

2. Lettering and numbering shall include:
  - a. The district or company name or owner of the bus shall be displayed at the beltline in 6-inch lettering and color shall be black.
  - b. The bus identification number shall be displayed on the sides, on the rear, and on the front in black.
3. Other lettering, numbering, or symbols, which may be displayed on the exterior of the bus, shall be limited to:
  - a. Bus identification number, minimum 12-inch high characters, on the top of the bus, in addition to required numbering on sides, rear, and front;
  - b. The location of the battery(ies) identified by the word "BATTERY" ~~, or "BATTERIES"~~ , or "12V BATTERIES", on the battery compartment door in 2-inch lettering;
  - c. Symbols or letters not to exceed 64 square inches of total display near the service door displaying information for identification by the students of the bus or route served;
  - d. Manufacturer, dealer or school identification or logos;
  - e. Symbols identifying the bus as equipped for or transporting students with special needs as noted in SPECIALLY EQUIPPED SCHOOL BUS SPECIFICATIONS;
  - f. Lettering on the rear of the bus relating to school bus flashing signal lamps or electronic warning sign. Lettering relating to railroad stop procedures, or wide turn information; and
  - g. Identification of fuel type in 1 inch lettering adjacent to the fuel filler opening.
4. Warning statements (see WARNING STATEMENTS) are also approved for school bus identification purposes.
5. Any type of advertising is prohibited (see ADVERTISING ON A SCHOOL BUS)

#### INSIDE HEIGHT

Inside body height shall be 72 inches or more, measured metal to metal, at any point on longitudinal centerline from front vertical bow to rear vertical bow. Inside body height of Type A-1 buses shall be 62 inches or more. Inside body height shall be 72 inches or more, measured metal to metal, at any point on longitudinal centerline from the front vertical bow to rear vertical bow. Inside body height of Type A-1 buses shall be 62 inches or more. This requirement does not apply to air conditioning equipment.

#### INSTRUMENTS AND INSTRUMENT PANEL

1. Chassis shall be equipped with the following instruments and gauges. (Telltale warning lamps in lieu of gauges are not acceptable, except as noted):
  - a. Speedometer;
  - b. Odometer, which will give accrued mileage (to seven digits), including tenths of miles, unless tenths of miles are registered on a trip odometer. Odometer must be readable without using a key;
  - c. Tachometer (Note: For Itypes B, C and D buses, a tachometer shall be installed so as to be visible to the driver while seated in a normal driving position.)
  - d. Voltmeter (An ammeter with graduated charge and discharge indications is permitted in lieu of a voltmeter; however, when used, the ammeter wiring must be compatible with the current flow of the system.
  - e. Oil pressure gauge;
  - f. Water temperature gauge;
  - g. Fuel gauge;
  - h. High beam headlight indicator;
  - i. Brake air pressure gauge (air brakes); brake indicator lamp (vacuum/hydraulic brakes), or brake indicator lamp (hydraulic/hydraulic);
  - j. Turn signal indicator; ~~and~~
  - k. Glow-plug or grid heater indicator light, where appropriate;
  - l. High-Voltage battery state of charge (electric bus only);

m. Motor Temp (electric bus only);

n. Battery available range in miles (electric bus only);

o. Battery discharge and regeneration rate (electric bus only); and

~~k-p.~~ Battery temperature (electric bus only).

2. All instruments shall be easily accessible for maintenance and repair.
3. Instruments and gauges shall be mounted on the instrument panel so that each is clearly visible to the driver while seated in a normal driving position.
4. Instrument and controls must be illuminated as required by FMVSS No. 101, Controls and Displays.
5. Multi-function gauges (MFG) are not recommended in Montana; however, if they are used they must meet the following criteria:
  - a. The driver must be able to manually select any displayable function of the gauge on a MFG, when desired.
  - b. When an out-of-limits condition that would be displayed on one or more functions of a MFG occurs, the MFG controller should automatically display this condition on the instrument cluster. This should be in the form of an illuminated telltale warning lamp as well as having the MFG automatically display the out-of-limits indications. Should two or more functions display on the MFG simultaneously, then the MFG should sequence automatically between those functions continuously until the condition(s) are corrected.
  - c. The use of a MFG does not relieve the need for audible warning devices, where required.

#### INSULATION

1. Ceiling and walls shall be insulated. If thermal insulation is specified, it shall be fire-resistant, UL approved, and approximately 1.5-inch-thick with minimum R-value of 5.5. The insulation shall be installed to prevent sagging.
2. Floor insulation shall be either 5 ply nominal 5/8-inch-thick plywood, or a material of equal or greater strength and insulation R value, and it shall equal or exceed properties of the exterior-type softwood plywood, C-D Grade as specified in standard issued by U.S. Department of Commerce. When plywood is used, all exposed edges shall be sealed. Type A buses may be equipped with nominal 1/2-inch-thick plywood or greater insulation R-value, sound abatement, deterioration-resistant and moisture-resistant properties.

#### INTERIOR

1. Interior of bus shall be free of all unnecessary projections, which include luggage racks and attendant handrails, to minimize the potential for injury. This standard requires inner lining on ceilings and walls. If ceiling is constructed to contain lapped joints, forward panel shall be lapped by rear panel and exposed edges shall be beaded, hemmed, flanged, or otherwise treated to minimize sharp edges. Buses may be equipped with a storage compartment for tools, tire chains, and/or tow chains. ~~(see The following section on extended stop arm becomes effective on July 1, 2022.~~

#### EXTENDED STOP ARM

1. When a school bus route includes a bus stop that requires a child to cross a roadway, the school bus must be equipped with an extended stop arm that partially obstructs the roadway.
2. ~~SA~~ school children may not cross a roadway to enter or exit from a school bus unless the roadway has been partially obstructed by the extended stop arm.
3. Extended Stop Arm must:
  - a. Be equipped with additional flashing red lights as specified in 61-9-402, MCA;
  - b. Be capable of extending a distance of at least 54 inches from the school bus; and
  - c. Be at a height of not less than 36 inches.
4. Extended Stop Arm should have an additional illuminated stop sign located at the furthest distance from the school bus.

## STORAGE COMPARTMENT

1. Interior overhead storage compartments may be provided if they meet the following criteria:
  - a. Head protection requirements of FMVSS [No. 222](#), School Bus Passenger Seating and Crash Protection, where applicable;
  - b. Be completely enclosed and equipped with latching doors. (Both the door and latch must be sufficient to withstand a force of 50 pounds applied at the inside center of the door);
  - c. Have all corners and edges rounded with a minimum radius of one inch or padded equivalent to door header padding;
  - d. Be attached to the bus sufficiently to withstand a force equal to twenty (20) times the maximum rated capacity of the compartment; and
  - e. Shall have no protrusions greater than 1/4 inch.
2. The driver's area forward of the foremost padded barriers will permit the mounting of required safety equipment and vehicle operation equipment.
3. Every school bus shall be constructed so that the noise level taken at the ear of the occupant nearest to the primary vehicle noise source shall not exceed 85 dBA when tested ~~per the procedure found in Appendix B.~~

## LAMPS AND SIGNALS

1. Interior lamps shall be provided which adequately illuminate aisle and step well. The step well light shall be illuminated by a service door operated switch, to illuminate only when headlights and clearance lights are on, and service door is open.
2. Body instrument panel lamps shall be controlled by an independent dimmer switch or may be controlled by the dimmer that operates the gauge lighting.
3. School bus alternately flashing signal lamps shall be provided, as described by law. MFSAB's are exempt from this requirement:
  - a. The school bus shall be equipped with at least two red lamps at the rear of vehicle and two red lamps at the front of the vehicle;
  - b. In addition to the four red lamps described above, four amber lamps shall be installed so that one amber lamp is located near each red signal lamp, at same level, but closer to vertical centerline of bus.
  - c. The system of red and amber signal lamps shall be wired so that amber lamps are energized manually, and red lamps are automatically energized (with amber lamps being automatically de- energized) when stop signal arms are extended or when bus service door is opened.
  - d. The above-mentioned activation sequence shall be sequential and include a master switch. An amber pilot light and a red pilot light shall be installed adjacent to the driver controls for the flashing signal lamp to indicate to the driver which lamp system is activated;
  - e. The area around the lens of each alternately flashing signal lamp and extending outward approximately three inches to the sides and top and a minimum one inch to the bottom, shall be black in color on the body or roof area against which the signal lamp is seen (from distance of 500 feet along axis of vehicle). Visors or hoods, black in color, with a minimum depth of 4 inches may be provided;
  - f. Red lamps shall flash at any time the stop signal arm is extended;
  - g. All flashers for alternately flashing red and amber signal lamps shall be enclosed in the body in a readily accessible location;
  - h. LED lamps can be used, however, if more than 1/3 of the LED lights go out, the light will be deemed inoperable, and the bus must be taken out of service until repairs have been completed; Additional red lights may be installed at the rear of the vehicle and at the front of the vehicle as follows:
    - i. Mounted at a height of at least 36 inches and not more than 72 inches from the ground;
    - ii. Be automatically energized in the same manner as the original red lights;
    - iii. Must flash in synchronization with the top red lights; and
    - iv. Must match the red color of the top red lights;

- v. Must be LED lights;
  - vi. May be a round, rectangle, or oblong shape;
  - vii. Cannot be a strobe light; and
  - viii. Cannot be light strip.
4. Turn signal and stop/tail lamps
- a. Bus body shall be equipped with amber rear turn signal lamps that are at least 7 inches in diameter or if a shape other than round, a minimum 38 square inches of illuminated area and meet FMVSS No. 108, Lamps, Reflective Devices, and Associated Equipment. These signal lamps must be connected to the chassis hazard-warning switch to cause simultaneous flashing of turn signal lamps when needed as vehicular traffic hazard warning. Turn signal lamps are to be placed as wide apart as practical and their centerline shall be approximately 12 inches below the rear window.
  - b. Buses shall be equipped with amber side-mounted turn signal lamps. The turn signal lamp on the left side shall be mounted rearward of the stop signal arm and the turn signal lamp on the right side shall be mounted rearward of the service door.
  - c. Signal lamps on Type B, C, and D buses shall include a left and right-side mounted turn signal lamp. They shall be located midway from the front axle and the rear of the bus and approximately twelve (12) inches from the bottom of the side windows. This lamp will be a standard manufacturer's design for this purpose and will have an amber color lens.
  - d. Buses shall be equipped with four combination red stop/tail lamps:
    - i. Two combination lamps with a minimum diameter of seven inches, or if a shape other than round, a minimum 38 square inches of illuminated area shall be mounted on the rear of the bus just inside the turn signal lamps.
    - ii. Two combination lamps with a minimum diameter of four inches, or if a shape other than round, a minimum 12 square inches of illuminated area shall be placed on the rear of the body between the beltline and the floor line. The rear license plate lamp may be combined with one lower tail lamp. Stop lamps shall be activated by the service brakes and shall emit a steady light when illuminated.
  - e. On buses equipped with a monitor for the front and rear lamps of the school bus, the monitor shall be mounted in full view of the driver. If the full circuit current passes through the monitor, each circuit shall be protected by a fuse or circuit breaker against any short circuit or intermittent shorts.
5. White flashing strobe lamp
- a. A mandatory white flashing strobe lamp shall be installed on the roof of a school bus, not closer than 12 inches or more than 6 feet, from the rear of the roof edge, clearly visible 50 feet or more from the rear of the bus. However, if the bus is equipped with a roof hatch, or other roof mounted equipment, falling within the above-mentioned measurements, the strobe lamp may be located directly behind the roof hatch.
  - b. The lamp shall have a single clear lens emitting light 360 degrees around its vertical axis meeting the requirements of SAE J845. It may not extend above the roof more than maximum legal height.
  - c. A manual switch and a pilot light shall be included to indicate when light is in operation.
  - d. When there is a home to school, school to home route, a strobe light shall be wired to activate with the amber alternately flashing signal lamps, continuing through the full loading or unloading cycle, with an override switch to allow activation of the strobe at any time for use in adverse conditions, effecting visibility, such as:
    - i. Snow
    - ii. Blizzards
    - iii. Rain
    - iv. Storms
    - v. Flooding
    - vi. Fog
    - vii. Smoke



- viii. Dust
- ix. Wind;

Note: Multi-Functional School Activity Bus (MFSAB) is are exempt from these requirements

6. Backup Lamps
  - a. Bus body shall be equipped with two white rear backup lamp signals that are at least four inches in diameter or, if a shape other than round, a minimum of 12 square inches of illuminated area and shall meet FMVSS No. 108. If backup lamps are placed on the same horizontal line as the brake lamps and turn signal lamps, they shall be to the inside.
7. Daytime Running Lamps (DRL) - A daytime running lamp(s) system shall be provided.
8. Outside Landing Light (Optional Equipment)
  - a. An optional outside landing light may be mounted near the entrance door to allow greater visibility when loading students in the dark.
    - i. This light shall be white and wired to activate when the entrance door is opened. A switch located near the driver would allow the driver to shut the light off during daylight hours.
    - ii. The outside landing light shall be a skirt-mounted exterior landing light.
    - iii. Upper portion of the light may be shielded to cast the light downward only.

#### METAL TREATMENT

1. All metal used in construction of bus body shall be zinc-coated or aluminum-coated or treated by equivalent process before the bus is constructed. Included are such items as structural members, inside and outside panels, door panels and floor sills. Excluded are such items as door handles, grab handles, interior decorative parts and other interior plated parts.
2. All metal parts that will be painted shall be, in addition to above requirements, chemically cleaned, etched, zinc-phosphate-coated and zinc-chromate or epoxy primed or conditioned by equivalent process. This includes, but is not limited to, such items as crossing control arm and stop arm.
3. In providing for these requirements, attention shall be given to lapped surfaces, welded connections of structural members, cut edges, punched or drilled hole areas in sheet metal, closed or boxed sections, unvented or un-drained areas and surfaces subjected to abrasion during vehicle operation.
4. As evidence that above requirements have been met, samples of materials and sections used in construction of the bus body shall be subjected to a cyclic corrosion testing as outlined in SAE J1563.

#### MIRRORS

1. Interior mirror shall be either clear view laminated glass or clear view glass bonded to a backing which retains the glass in the event of breakage. The mirror shall have rounded corners and protected edges. All Type A buses shall have a minimum of a 6-inch x 16-inch mirror and Type B,C, and D buses shall have a minimum of a 6-inch x 30-inch mirror.
2. Each school bus shall be equipped with exterior mirrors meeting the requirements of FMVSS No. 111, Rearview Mirrors. The right side rear view mirror shall not be obscured by the un-wiped portion of the windshield. Mirrors shall be easily adjustable, but shall be rigidly braced to reduce vibration. Bumper accessories may not obstruct driver's vision as required by FMVSS No. 111.
3. Heated external mirrors may be used.
4. Remote controlled external rear view mirrors may be used.

#### MOBILE DATA DEVICE (OPTIONAL)

1. If equipped, the Mobile Data Device (MDD) shall be mounted in an area that shall not block the driver's field of view through the windshield. The MDD shall not block the view of/or access to any gauges, mirrors, indicator lights, or safety controls.
2. The MDD shall be securely mounted as not to be a snagging hazard in the student-loading area of the service door.
3. Audio and/or visual turn-by-turn instructions from the MDD system are allowed while the bus is being

operated. Audible directions shall not use the speakers within the passenger compartment.

4. While the bus is in motion, audio and visual instructions on the MDD may remain functional, but operational and tactile functions shall be disabled.

#### MOUNTING

1. The chassis frame shall support rear body cross member. The bus body shall be attached to the chassis frame at each main floor sill, except where the chassis components interfere, in such manner as to prevent shifting or separation of the body from the chassis under severe operating conditions.
2. Insulators shall be placed at all contact points between body and chassis frame on Type A-2, B, C, and D buses, and shall be secured by a positive means to the chassis frame or body that it will prevent shifting, separation, or displacement of the insulators under severe operating conditions.

#### OIL FILTER

An oil filter with a replaceable element shall be provided and connected by flexible oil lines if not a built-in or an engine-mounted design. The oil filter shall have a capacity in accordance with the engine manufacturer's recommendation.

#### OPENINGS

All openings in the floorboard or firewall between chassis and passenger compartment, such as for gearshift selector and parking brake lever, shall be sealed.

#### OVERALL LENGTH

Overall length of bus shall not exceed 45 feet, excluding accessories.

#### OVERALL WIDTH

Overall width of bus shall not exceed 102 inches, excluding accessories.

#### PASSENGER LOAD

1. Actual Gross Vehicle Weight (GVW) is the sum of the chassis weight, plus the body weight, plus the driver's weight, plus total seated pupil weight.
  - a. For purposes of calculation, the driver's weight is 150 pounds.
  - b. For purposes of calculation, the pupil weight is 120 pounds per pupil.
2. Actual ~~Gross Vehicle Weight (GVW)~~ shall not exceed the chassis manufacturer's ~~Gross Vehicle Weight Rating~~GVWR for the chassis, nor shall the actual weight carried on any axle exceed the chassis manufacturer's GAWR.

#### PUBLIC ADDRESS SYSTEM

1. Buses may be equipped with an AM/FM/audio and/or public address system having interior and exterior speakers.
2. No internal speakers, other than the driver's communication system, may be installed within four feet of the driver's seat back in its rearmost upright position.

#### RETARDER SYSTEM (OPTIONAL EQUIPMENT)

A retarder system, if used, shall maintain the speed of the fully loaded school bus at 19.0 mph or 30 km/hr. on a 7 percent grade for 3.6 miles or 6 km.

#### RETRO-REFLECTIVE MATERIAL

1. Front and/or rear bumper may be marked diagonally 45 degrees down to centerline of pavement with 2 1/4-inch-wide strips of non-contrasting reflective material.
2. Rear of bus body shall be marked with strips of Retro-reflective NSBY material to outline the perimeter of

the back of the bus using material, which conforms with the requirements of FMVSS [No. 131](#), School Bus Pedestrian Safety Devices, Table 1. The perimeter marking of rear emergency exits per FMVSS No. 217, Bus Emergency Exits and Window Retention and Release and/or the use of retro- reflective “SCHOOL BUS” signs partially accomplish the objective of this requirement. To complete the perimeter marking of the back of the bus, strips of Retro reflective NSBY material, a minimum of 1” and a maximum of 2” in width shall be applied horizontally above the rear windows and above the rear bumper extending from the rear emergency exit perimeter marking outward to the left and right rear corners of the bus. Vertical strips shall be applied at the corners connecting these horizontal strips.

3. “SCHOOL BUS” signs, if not of lighted design, shall be marked with retro-reflective NSBY material comprising background for lettering of the front and/or rear “SCHOOL BUS” signs.
4. Sides of bus body shall be marked with retro-reflective NSBY material at least 1 3/4 inches in width, extending the length of the bus body and located (vertically) between the floor line and the beltline.
5. Signs, if used, placed on the rear of the bus relating to school bus flashing signal lamps or railroad stop procedures shall be of retro-reflective material which conforms with the requirements of FMVSS [No. 131](#), School Bus Pedestrian Safety Devices, Table 1 specified in No. 2 in this section.

#### RUB RAILS

1. There shall be one rub rail located on each side of bus approximately at seat cushion level which shall extend from the rear side of entrance door completely around bus body (except emergency door or any maintenance access door) to point of curvature near outside cowl on left side.
2. There shall be one additional rub rail located approximately 10 inches or less above the floor line. The rub rail shall cover the same longitudinal span as upper rub rail, except at wheel housing, and it shall extend only to longitudinal tangent of the right and left rear corners.
3. Rub rails shall be attached at each body post and all other upright structural members.
4. Rub rails shall be four inches or more in width in their finished form, shall be of 16-gauge steel or suitable material of equivalent strength, and shall be constructed in corrugated or ribbed fashion.
5. Rub rails shall be applied outside body or outside body posts. Pressed-in or Snap-On rub rails do not satisfy this requirement. For Type A-2 vehicles using chassis manufacturer’s body, or for Type A-1,B, C and D buses using rear luggage or rear engine compartment, rub rails need not extend around rear comers.
6. There shall be a rub rail or equivalent bracing located horizontally at the bottom edge of the body side skirts.

#### SEATS AND RESTRAINING SYSTEM

##### PASSENGER SEATING

1. School bus design capacities shall be in accordance with 49 CFR, Part 571.3 Definitions, and, FMVSS No. 222, School Bus Passenger Seating and Crash Protection.
2. All seats shall have a minimum depth of 15 inches and must comply with all requirements of FMVSS No. 222. All seat backs shall be a minimum of 24 inches from the seating reference point School bus design capacities shall be in accordance with 49 CFR, Part 571.3 and FMVSS No. 222. In addition to the fastener that forms the pivot for each seat retaining clip, a secondary fastener may be used in each clip to prevent the clip from rotating and releasing the seat cushion unintentionally.
3. All restraining barriers and passenger seats shall be constructed with materials that enable them to meet the criteria contained in the School Bus Seats Upholstery Fire Block Test, or ASTM E2574/E2574M – 12a Standard Test Method for Fire Testing of School Bus Seat Assemblies.
4. Each set leg shall be secured to the floor by bolts, washers to meet performance requirements of FMVSS No. 222. Flange-head nuts may be used in lieu of nuts and washers. All seat frames attached to the seat rail shall be fastened with 2 or more bolts, washers and nuts, or with flange-head nuts. Seats may be track-mounted in conformance with FMVSS [No. 222.7](#). If track seating is installed, the manufacturer shall supply minimum and maximum seat spacing dimensions (applicable to the bus) which comply with FMVSS No. 222. This information shall be on a label permanently affixed to the bus.

5. All school buses (including Type A) shall be equipped with restraining barriers conforming to FMVSS [No. 222](#).
6. A flip-up seat may be installed at any side emergency door if it conforms to FMVSS [No. 222](#), and aisle clearance requirements of FMVSS [No. 217](#), Bus Emergency Exits and Window Retention and Release. The flip seat shall be free of sharp projections on the underside of the seat bottom. The underside of the flip-up seat bottoms shall be padded or contoured to reduce the possibility of snagged clothing or injury during use. Flip seats shall be constructed to prevent passenger limbs from becoming entrapped between the seat back and the seat cushion when in upright position. The seat cushion shall be designed to rise to a vertical position automatically when not occupied.

#### SEAT – LAP AND SHOULDER BELTS FOR STUDENT SEATING

1. Any new school bus that is put into service after the effective date of this new standard may be ordered with a lap and shoulder belt system. The seat and lap ~~and~~ shoulder belting system shall meet the requirement of FMVSS [No. 222](#), Compartmentalization for the protection of students that may not be restrained. This seat and seat anchorage must meet or exceed all government safety standards
2. Used buses may not be retrofitted to include lap ~~and~~ shoulder belts unless the bus was built "seat belt ready" or with removable restraints by the school bus manufacturer.
3. Lap belts shall not be installed on passenger seats in large school buses (over 10,000 pounds GVWR); ~~except in conjunction with child safety restraint systems that comply with the requirements of FMVSS No. 213, Child Restraint Systems.~~
4. Adhering with the requirements listed above, three-point lap ~~and~~ shoulder seat belts may be installed in large school buses (over 10,000 pounds GVWR).
5. If a school bus is equipped [with](#) lap and shoulder belts for students in accordance with FMVSS No 222, then a child being transported in a seat with lap ~~and~~ shoulder belt must be properly restrained with a lap ~~and~~ shoulder belt.

#### SEAT – PRE-SCHOOL AGE SEATING

1. Passenger seats designed to accommodate a child or infant carrier seat shall comply with FMVSS No. 225, Child Restraint Anchorage Systems. These seats shall follow NHRSA's "Guideline for the Safe Transportation of Pre-school Age Children in School Buses." ~~" "~~
2. If a school bus is equipped with child restraint anchorage systems in accordance with FMVSS No 225, then any child who is under 6 years of age and weighing less than 60 pounds and is being transported in a seat with a child restraint anchorage systems must be properly restrained in a child safety restraint.
3. Generally, school buses are exempt from the requirement for a child under 6 years of age and weighing less than 60 pounds to be properly restrained in an appropriate child safety restraint. See 61-9-420 and 61-9-421, MCA.

#### DRIVER SEAT

The driver's seat supplied by the body manufacturer shall be a high back seat. The seat back shall be adjustable to 15 degrees minimum, without requiring the use of tools. The seat shall be equipped with a head restraint to accommodate a 5th percentile female to a 95th percentile adult male, as defined in FMVSS No. 208, Occupant Crash Protection.

Type A buses may utilize the standard driver's seat provided by the chassis manufacturer.

#### DRIVER RESTRAINT SYSTEM

A Type 2 lap ~~and~~ shoulder belt shall be provided for the driver. On buses where the driver's seat and upper anchorage for the shoulder belt are both attached to the body structure, a driver's seat with an integrated Type 2 lap ~~and~~ shoulder belt may be substituted. On buses where the driver's seat and upper anchorage for the shoulder belt are separately attached to both the body and chassis structures (i.e., one attached to the

chassis and the other attached to the body) a driver's seat with an integrated Type 2 lap and /shoulder belt should be used.

The assembly shall be equipped with an Emergency Locking Retractor (ELR) for the continuous belt system. On all buses except Type A equipped with standard chassis manufacturer's driver's seat, the lap portion of the belt shall be guided or anchored to prevent the driver from sliding sideways under the belt system. The lap and /shoulder belt shall be designed to allow for easy adjustment to fit properly and effectively protect drivers varying from 5th percentile female to 95th percentile male. The belt shall be of a high visibility contrasting color.

#### SEAT BELT CUTTER

Each bus shall be equipped with a durable webbing cutter having a full width handgrip and a protected, replaceable or non-corrodible blade. The required belt cutter shall be mounted in a location accessible to the seated driver in an easily detachable manner regardless of the condition of the bus

#### SHOCK ABSORBERS

The bus shall be equipped with double-action shock absorbers compatible with manufacturer's rated axle capacity at each wheel location.

#### SIDE SKIRTS

The bus body side skirts between the front and rear axles shall extend down to within 2 inches plus or minus, of the horizontal line from the center of the front spindle to the center of the rear axle. The manufacturer may offer optional side skirt lengths that extend lower than this requirement. This measurement shall apply to a new unloaded school bus located on a flat, level surface.

#### STEERING GEAR

1. The steering gear shall be approved by the chassis manufacturer and designed to ensure safe and accurate performance when the vehicle is operated with maximum load and at maximum speed.
2. If external adjustments are required, steering mechanism shall be accessible to adjust.
3. No changes shall be made in the steering apparatus, which are not approved by the chassis manufacturer.
4. There shall be a clearance of at least two inches between the steering wheel and cowl, instrument panel, windshield, or any other surface.
5. Power steering is required and shall be of the integral type with integral valves.
6. The steering system shall be designed to provide a means for lubrication of all wear-points, if wear- points are not permanently lubricated

#### STEPS

1. The first step at the service door shall be not less than 10 inches and not more than 14~~16~~ inches from the ground when measured from the top surface of the step to the ground, based on standard chassis specifications, except that on Type D vehicles, the first step at the entrance door shall be 12 inches to 16 inches from the ground. On chassis modifications, which may result in increased ground clearance (such as four-wheel drive) an auxiliary step may be provided to compensate for the increase in ground-to-first-step clearance. The auxiliary step is not required to be closed.
2. Step risers shall not exceed a height of 10 inches. Exception is when plywood is used on a steel floor or step, the riser height may be increased by the thickness of the plywood.
3. Steps shall be enclosed to prevent accumulation of ice and snow.
4. Steps shall not protrude beyond the side bodyline.

#### STEP TREADS

1. All steps, including floor line platform area, shall be covered with an elastomer floor covering having a minimum overall thickness of 0.187 inch. Any design that provides equal or greater traction is acceptable.

2. The step covering shall be permanently bonded to a durable backing material that is resistant to corrosion.
3. Steps, including the floor line platform area, shall have a 1 ½ inch nosing that contrasts in color by at least 70% measured in accordance with the contrasting color specification in 36 CFR, Part 1192, ADA, Accessibility Guidelines for Transportation Vehicles.
4. Step treads shall have the following characteristics:
  - a. Abrasion resistance: Step tread material weight loss shall not exceed 1.10 percent, as tested under ASTM D-4060, Standard Test Method for Abrasion Resistance of Organic Coatings by the Taber Abraser, (DS-17 Wheel, 1000 gram, 1000 cycle);
  - b. Weathering resistance: Step treads shall not break, crack, or check after ozone exposure (7 days at 50 phm at 40 degrees C); and Weatherometer exposure (ASTMD-750, Standard Test Method for Rubber Deterioration in Carbon-Arc Weathering Apparatus, 7 days); and
  - c. Flame resistance: Step treads shall have a calculated burn rate of .01 mm per minute or less using the test methods, procedures and formulas listed in FMVSS No. 302, Flammability of Interior Materials.
  - d. A spray on application type material that meets the requirements of items a through c above may be used in lieu of Number 1 A. The material shall be applied not only to the interior surfaces of the service door step treads but the exterior as well if not covered by undercoating.

#### STIRRUP STEPS

Unless the windshield and lamps are not easily accessible from the ground, there may be at least one folding stirrup step or recessed foothold and suitably located handles on each side of the front of the body for easy accessibility for cleaning. Steps are permitted in or on the front bumper, in lieu of the stirrup steps, if the windshield and lamps are easily accessible for cleaning from that position.

#### STOP ARMS

##### STOP SIGNAL ARM

1. The stop signal arm(s) shall comply with the requirements of FMVSS [No. 131](#), School Bus Pedestrian Safety Devices. The stop signal arm is a required retrofit of all school buses, effective July 1, 1987. (Reference section on lamps and signals 3.b. (4).) MFSABs are exempt from these requirements.
2. Any newly manufactured bus under 40 feet in length may have an optional stop signal arm mounted to the rear of the bus.
3. Any newly manufactured bus over 40 feet in length shall have an additional stop signal arm mounted to the rear of the bus.
4. Stop Signal Arms may be equipped with a camera system(s).

~~The following section on extended stop arm becomes effective on July 1, 2022.~~

##### EXTENDED STOP ARM

5. When a school bus route includes a bus stop that requires a child to cross a roadway, the school bus must be equipped with an extended stop arm that partially obstructs the roadway.
6. ~~SA~~-school children may not cross a roadway to enter or exit from a school bus unless the roadway has been partially obstructed by the extended stop arm.
7. Extended Stop Arm must:
  - a. Be equipped with additional flashing red lights as specified in 61-9-402, MCA;
  - b. Be capable of extending a distance of at least 54 inches from the school bus; and
  - c. Be at a height of not less than 36 inches.
8. Extended Stop Arm should have an additional illuminated stop sign located at the furthest distance from the school bus.

#### STORAGE COMPARTMENT

A storage container for tools, tire chains, and/or tow chains may be located either inside or outside the passenger compartment. If inside, it shall have a cover (seat cushion may not serve this purpose) capable of being securely latched and fastened to the floor, convenient to either the service or emergency door. Luggage



storage compartments accessible from the outside shall be lockable.

#### SUN SHIELD

1. Interior adjustable transparent sun shield not less than ~~6~~<sup>six</sup> inch x 30 inch for Type B, C, and D vehicles, with a finished edge, shall be installed in a position convenient for use by driver.
2. On all Type A buses, the sun shield shall be installed by the chassis Manufacturer.

#### SUSPENSION SYSTEM

1. The capacity of springs or suspension assemblies shall be commensurate with the chassis manufacturer's GVWR.
2. Rear leaf springs shall be of a progressive rate or multi-stage design. Front leaf springs shall have a stationary eye at one end and shall be protected by a wrapped leaf, in addition to the main leaf.

#### THROTTLE

The force required to operate the throttle shall not exceed 16 pounds throughout the full range of accelerator pedal travel.

#### TIRES AND RIMS

1. Rims of the proper size and tires of the proper size with a load rating commensurate with chassis manufacturer's gross vehicle weight rating shall be provided. The use of multi-piece rims and/or tube-type tires shall not be permitted on any school bus ordered after December 31, 1995.
2. Dual rear tires shall be provided on Type A-2, Type B, Type C, and Type D school buses.
3. All tires on a bus shall be of the same size, and the load range of the tires shall meet or exceed the GVWR as required by FMVSS No. 120, Tire Selection and Rims for Vehicles other than Passenger Car.
4. If the vehicle is equipped with a spare tire and rim assembly, it shall be the same size as those mounted on the bus.
5. If a tire carrier is required, it shall be suitably mounted in an accessible location outside the passenger compartment.
6. Tread depth 4/32 inches on front and 2/32 inches on rear will be minimum. Retreads are allowed on rear wheels only.

#### TOWING ATTACHMENT POINTS

Front and/or rear towing devices (i.e. tow hooks, tow eyes, or other designated towing attachment points) shall be furnished to assist in the retrieval of buses that are stuck and/or for towing buses when a wrecker with a "wheel lift" or an "axle lift" is not available or cannot be applied to the towed vehicle. Towing devices shall be attached to the chassis frame by either the chassis or body manufacturer in accordance with the chassis manufacturer's specifications.

Each towing device shall have a strength rating of ~~13,000~~ 13,500 pounds each, for a combined rating of 27,000 pounds with the force applied in the rearward direction, parallel to the ground, and parallel to the longitudinal axis of the chassis frame rail. For pulling and lifting purposes, tow hooks are meant to be used simultaneously. For pulling, angularity applied to the tow hooks will decrease the capacities of the tow hooks.

The towing devices shall be mounted such that they do not project forward of the front or rearward of the rear bumper.

**Note:** (Type A buses are exempt from this requirement for front tow hooks or eyes due to built-in crush zones.)

#### TRACTION ASSISTING DEVICES (OPTIONAL)

1. Where required or used, sanders shall:

- a. Be of hopper cartridge-valve type;
  - b. Have metal hopper with all interior surfaces treated to prevent condensation of moisture;
  - c. Be of at least 100-pound (grit) capacity;
  - d. Have a cover on filler opening of the hopper, which screws into place, sealing unit airtight;
  - e. Have discharge tubes extending under the fender wheel housing to the front of each rear wheel;
  - f. Have no-clogging discharge tubes with slush-proof, non-freezing rubber nozzles;
  - g. Be operated by an electric switch with pilot light mounted on the instrument panel located to be exclusively controlled by the driver;
  - h. Be equipped with a gauge to indicate that the hopper has reached the one-quarter level (and needs to be refilled); and
  - i. Be designed to prevent freezing of all activation components and moving parts.
2. Automatic traction chains may be installed.

#### TRANSMISSION (FOR INTERNAL COMBUSTION ENGINES ONLY)

1. Automatic transmissions shall have no fewer than three forward speeds and one reverse speed. The mechanical shift selector shall provide a detent between each gear position when the gear selector quadrant and shift selector are not steering column mounted.
2. Automatic transmissions shall have a transmission shifter interlock controlled by the application of the service brake to prohibit accidental engagement of the transmission.

#### TRASH CONTAINER AND HOLDING DEVICE

Where requested or used, the trash container shall be secured by a holding device that is designed to prevent movement and to allow easy removal and replacement; and it shall be installed in an accessible location in the driver's compartment, not obstructing passenger use of the entrance door.

#### TURNING RADIUS

1. A chassis with a wheelbase of 264 inches or less shall have a right and left turning radius of not more than 42.5 feet, curb-to-curb measurement.
2. A chassis with a wheelbase of 265 inches or more shall have a right and left turning radius of not more than 44.5 feet, curb-to-curb measurement.

#### UNDERCOATING

1. Entire underside of bus body, including floor sections, cross member and below floor line side panels, shall be coated with rust-proofing compound for which compound manufacturer has issued notarized certification of compliance to the bus body builder that compound meets or exceeds all performance requirements of SAE J1959.
2. Undercoating material shall be applied with suitable airless or conventional spray equipment to the undercoating material manufacturer recommended film thickness and shall show no evidence of voids in cured film.
3. The undercoating material shall not cover any exhaust components of the chassis.

#### VENTILATION

1. Mandatory auxiliary fans shall meet the following requirements:
  - a. Two auxiliary fans are required and shall be placed in a location where they can be adjusted for maximum effectiveness and do not obstruct the driver's vision or interfere with the safe operation of necessary equipment.
  - b. Fans shall be a nominal six-inch (nominal) diameter; and
  - c. Fan blades shall be enclosed in a protective cage.
  - d. Each fan shall be controlled by a separate switch.
2. The bus body shall be equipped with a suitably controlled ventilating system of sufficient capacity to

maintain proper quantity of air under operating conditions, without having to open windows except in extremely warm weather.

3. Static-type non-closeable exhaust ventilation shall be installed in low-pressure area of roof.
4. Roof hatches designed to provide ventilation, regardless of the exterior weather conditions, may be provided.

#### WARNING STATEMENTS

Buses may have one or both warning statements listed in a & b below to the rear of the bus. These statements shall be located either between the upper and lower glass panes on the rear emergency exit door, or equivalent location if rear door is absent, and /or below the rear tail/stop lights on the right side. These statements apply whether the bus is loaded or unloaded.

1. "This Bus Stops at All R.R. (or Railroad) Crossings." (An equivalent message may be substituted, not to exceed total number of letters and spaces of original.)
2. "STOP-Illegal to Pass When Overhead Red Lights Are Flashing." (An equivalent message may be substituted, not to exceed total number of letters and spaces of original.)
3. The lettering shall conform to "series B" of Standard Alphabets for highway signs, shall be black, and shall be sized so the message will fit the available space, but not to exceed two inches.

#### WHEEL HOUSING

1. The wheel housing opening shall allow for easy tire removal and service.
2. The wheel housing shall be attached to floor sheets in such a manner as to prevent any dust, water or fumes from entering the body. Wheel housing shall be constructed of at least 16-gauge steel.
3. The inside height of the wheel housing above the floor line shall not exceed 12 inches.
4. The wheel housing shall provide clearance for installation and use of tire chains on single and dual (if so equipped) power-driving wheels.
5. No part of the raised wheel housing shall extend into the emergency door opening.

#### WINDOWS

1. Each full side window, other than emergency exits designated to comply with FMVSS [No. 217](#), Bus Emergency Exits and Window Retention and Release, each side window shall provide an unobstructed emergency opening of at least nine inches (but not more than 13 inches high) and at least 22 inches wide, obtained by lowering the window. One side window on each side of the bus may be less than 22 inches wide.
2. Optional tinted and/or frost-free glazing may be installed in all doors, windows, and windshields consistent with federal, state, and local regulations. For improved visibility, frost-free glazing shall be installed in the driver's window (excluding Type A). Optional frost-free glazing may be installed in the first two windows to the rear of the entry door and/or the first window behind the driver.
3. See door section for entrance door glazing requirements.

#### WINDSHIELD WASHERS

A windshield washer system shall be provided.

#### WINDSHIELD WIPERS

1. A windshield wiping system, two-speed or variable speed, with an intermittent feature, shall be provided and shall be operated by a single switch.
2. The wipers shall be operated by one or more air or electric motors of sufficient power to operate wipers. If one motor is used, the wipers shall work in tandem to give full sweep of windshield. The wiper system shall meet the requirements of FMVSS No. 104, Windshield Wiping and Washing Systems.

#### SPECIALLY EQUIPPED SCHOOL BUSES

## INTRODUCTION

The specifications in this section are intended to be supplementary to specifications in the Body and Chassis section. In general, specially equipped buses shall meet all the requirements of the preceding sections plus those listed in this section. It is recognized by the entire industry that the field of special transportation is characterized by varied needs for individual cases and by a rapidly emerging technology for meeting those needs.

## DEFINITION

A specially equipped school bus is any school bus, which is designed, equipped, and/or modified to accommodate students with special transportation needs.

## GENERAL REQUIREMENTS

1. School buses designed for transporting students with special transportation needs shall comply with Montana School Bus Standards, National School Transportation Specifications ~~and~~ Procedures and with the Federal Vehicle Safety Standards and with ~~Federal Motor Vehicle Safety Standards (FMVSS)~~ applicable to their ~~Gross Vehicle Weight Rating (GVWR)~~ category.
2. Any school bus to be used for the transportation of children who utilize a wheelchair or other mobile positioning device, or who require life support equipment that prohibits use of the regular service entrance, shall be equipped with a power lift.

## AISLES

All school buses equipped with a power lift shall provide a minimum 30-inch pathway leading from any wheelchair/mobility aid position to at least one 30" wide emergency exit door. A wheelchair securement position shall never be located directly in front of (blocking) a power lift door location. ~~It is understood that, when provided, the lift service door is considered an emergency exit.~~

## COMMUNICATIONS

~~All school buses which are used to transport individuals with disabilities should be equipped with a two-way electronic voice communication system that can be used at any point in the vehicle's route. Where no such service exists, vehicles would be exempt.~~

## GLAZING

Tinted glazing may be installed in all doors, windows, and windshields consistent with federal, state, and local regulations.

## IDENTIFICATION

Specially equipped school buses shall display below the window line the International Symbol of Accessibility. Such emblems shall be white on blue background, shall not exceed 12 square inches in size, and shall be of a high-intensity, Retro-reflective material meeting Federal Highway Administration (FHWA) FP-85 Standard Specifications for Construction of Roads and Bridges on Federal Highway Projects.

## PASSENGER CAPACITY RATING

In determining the passenger capacity of a school bus for purposes other than actual passenger load (e.g., vehicle classification, or various billing/reimbursement models), any location in a school bus intended for securement of an occupied wheelchair/mobility aid during vehicle operations may be regarded as four designated seating positions. Similarly, each lift area may be regarded as four designated seating positions.

## POWER LIFTS

1. ~~The P~~power lift shall be located on the right side of the bus body.
2. Exception: The lift may be located on the left side of the bus if, and only if, the bus is only used to deliver

students to the left side of one-way streets.

3. Vehicle lift and installation

- a. General: Vehicle lifts and installations shall comply with the requirements set forth in FMVSS [No. 403](#), Platform Lift Systems for Motor Vehicles, and FMVSS [No. 404](#), Platform Lift Installations in Motor Vehicles.
- b. Design load: The design load of the lift shall be at least 800 pounds. Working parts, such as cables, pulleys, and shafts, which can be expected to wear, and upon which the lift depends for support of the load, shall have a safety factor of at least six (6), based on the ultimate strength of the material. Non-working parts, such as platform, frame, and attachment hardware that would not be expected to wear, shall have a safety factor of at least three (3), based on the ultimate strength of the material.
- ~~b.c. Lift capacity: The lifting mechanism and platform shall be capable of operating effectively with a wheelchair and occupant mass of at least 800 pounds.~~
- ~~c.d. Controls Requirements: Controls shall enable the operator to activate the lift mechanism from either inside or outside the bus. See 49 CFR 571.403, S6.7, Control systems. The controls should be interlocked with the vehicle brakes, transmission, or door, or shall provide other appropriate mechanisms or systems to ensure the vehicle cannot be moved when the lift is not stowed and so the lift cannot be deployed unless the interlocks or systems are engaged. The lift shall deploy to all levels (i.e., ground, curb, and intermediate positions) normally encountered in the operating environment. Where provided, each control for deploying, lowering, raising, and stowing the lift and lowering the roll-off barrier shall be of a momentary contact type requiring continuous manual pressure by the operator and shall not allow improper lift sequencing when the lift platform is occupied. The controls shall allow reversal of the lift operation sequence, such as raising or lowering a platform that is part way down, without allowing an occupied platform to fold or retract into the stowed position.~~
  - ~~i. Exception—Where the lift is designed to deploy with its long dimension parallel to the vehicle axis and which pivots into or out of the vehicle while occupied (i.e., “rotary lift”), the requirements of this paragraph prohibiting the lift from being stowed while occupied shall not apply if the stowed position is within the passenger compartment and the lift is intended to be stowed while occupied.~~
- ~~d.e. Emergency operation:— The lift shall incorporate an emergency method of deploying, lowering to ground level with a lift occupant, and raising and stowing the empty lift if the power to the lift fails. See 49 CFR 571.403, S6.9, Backup operation. No emergency method, manual or otherwise, shall be capable of being operated in a manner that could be hazardous to the lift occupant or to the operator when operated per manufacturer’s instructions and shall not permit the platform to be stowed or folded when occupied, unless the lift is a rotary lift and is intended to be stowed while occupied. No manual emergency operation shall require more than two (2) minutes to lower an occupied wheelchair to ground level.~~
- ~~e.f. Power or equipment failure:— Platforms stowed in a vertical position, and deployed platforms when occupied, shall have provisions to prevent their deploying, falling, or folding any faster than 12 inches per second or their dropping of an occupant in the event of a single failure of any load carrying component. See 49 CFR 571.403, S6.2.2, Maximum platform velocity. Platform barriers: See 49 CFR 571.403, S6.4.7, Wheelchair retention.~~
  - ~~i. Platform barriers— The lift platform shall be equipped with barriers to prevent any of the wheels of a wheelchair or mobility aid from rolling off the platform during its operation. A movable barrier or inherent design feature shall prevent a wheelchair or mobility aid from rolling off the edge closest to the vehicle until the platform is in its fully raised position. Each side of the lift platform that extends beyond the vehicle in its raised position shall have a barrier a minimum 1.5 inches high. Such barriers shall not interfere with maneuvering into or out of the aisle. The loading-edge barrier (outer barrier), which functions as a loading ramp when the lift is at ground level, shall be sufficient when raised or closed, or a supplementary system shall be provided, to prevent a power wheelchair or mobility aid from riding over or defeating it. The outer barrier of the lift shall automatically raise or close, or a supplementary system shall automatically engage, and remain~~

raised, closed, or engaged always that the platform is more than 3 inches above the roadway or sidewalk and the platform is occupied. Alternatively, a barrier or system may be raised, lowered, opened, closed, engaged, or disengaged by the lift operator, provided an interlock or inherent design feature prevents the lift from rising unless the barrier is raised or closed or the supplementary system is engaged.

~~f.g.~~ Platform surface:— See 49 CFR 571.403, S6.4.2, S6.4.3, Platform requirements. See also “Wheelchair or Mobility Aid Envelope” figure at the end of this subsection. The platform surface shall be free of any protrusions over 1/4 inch high and shall be slip resistant. The platform shall have a minimum clear width of 28.5 inches at the platform, a minimum clear width of 30 inches measured from two inches above the platform surface to 30 inches above the surface of the platform, and a minimum clear length of 48 inches measured from two inches above the surface of the platform to 30 inches above the surface of the platform.

~~g.h.~~ Platform gaps and entrance ramps:— See 49 CFR 571.403, S6.4.4, Gaps, transitions and openings. Any openings between the platform surface and the raised barriers shall not exceed 5/8 inch in width. When the platform is at vehicle floor height with the inner barrier (if applicable) down or retracted, gaps between the forward lift platform edge and the vehicle floor shall not exceed 1/2 inch horizontally and 5/8 inch vertically. Platforms on semi-automatic lifts may have a hand hold not exceeding 1.5 inches by 4.5 inches located between the edge barriers.

~~h.i.~~ Platform deflection:— See 49 CFR 571.403, S6.4.5, Platform deflection. The lift platform (not including the entrance ramp) shall not deflect more than 3 degrees (exclusive of vehicle roll or pitch) in any direction between its unloaded position and its position when loaded with 600 pounds applied through a 26-inch by 26-inch test pallet at the centroid of the platform.

~~i.j.~~ Platform movement:— See 49 CFR 571.403, S6.2.3, Maximum platform acceleration. No part of the platform shall move at a rate exceeding 6 inches per second during lowering and lifting an occupant, and shall not exceed 12 inches per second during deploying or stowing. This requirement does not apply to the deployment or stowage cycles of lifts that are manually deployed or stowed. The maximum platform horizontal and vertical acceleration when occupied shall be 0.3 g.

~~4.k.~~ Boarding direction:— The lift shall permit both inboard and outboard facing of wheelchair and mobility aid users.

~~5.~~ Use by standees—Lifts shall accommodate persons using walkers, crutches, canes or braces, or who otherwise have difficulty using steps. The platform may be marked to indicate a preferred standing position.

~~6.l.~~ Handrails:— See 49 CFR 571.403, S6.4.9, Handrails. Platforms on lifts shall be equipped with handrails on two sides, which move in tandem with the lift, and which shall be graspable and provide support to standees throughout the entire lift operation. Handrails shall have a usable component at least 8 inches long with the lowest portion a minimum 30 inches above the platform and the highest portion a maximum 38 inches above the platform. The handrails shall withstand a force of 100 pounds concentrated at any point on the handrail without permanent deformation of the rail or its supporting structure. The handrail shall have a cross-sectional diameter between 1 1/4 inches and 1 1/2 inches or shall provide an equivalent grasping surface, and have eased edges with corner radii of not less than 1/8 inch.

~~a.~~ Handrails shall be placed to provide a minimum 1 1/2-inch knuckle clearance from the nearest adjacent surface. Handrails shall not interfere with wheelchair or mobility aid maneuverability when entering or leaving the vehicle.

~~7.m.~~ Circuit breaker:— A resettable circuit breaker shall be installed between power source and lift motor if electrical power is used. It shall be located as close to the power source as possible, but not within the passenger/driver compartment.

~~8.n.~~ Excessive pressure:— See 49 CFR 571.403, S6.8, Jacking prevention. Lift design shall prevent excessive pressure that could damage the lift system when the platform is fully lowered or raised, or that could jack the vehicle.



- ~~9.4.~~ Documentation:— The following information shall be provided with each vehicle equipped with a lift:
- A phone number where information can be obtained about installation, repair, and parts. (Detailed written instructions and a parts list shall be available upon request.)
  - Detailed instructions regarding use of the lift ~~and shall be~~ readily visible when the lift door is open, including a diagram showing the proper placement and positioning of wheelchair/mobility aids on lift.
- ~~10.5.~~ Training materials:— The lift manufacturer shall make available training materials to ensure the proper use and maintenance of the lift. These may include instructional videos, classroom curriculum, system test results, or other related materials.
- ~~11.6.~~ Identification and certification:— Each lift shall be permanently and legibly marked or incorporate a non-removable label or tag which states that it conforms to all applicable requirements of the current National Standards for School Buses. In addition, the lift manufacturer, or an authorized representative, upon request of the original titled purchaser, shall provide a notarized Certificate of Conformance, either original or photocopied, which states that the lift system meets all the applicable requirements of the current National School Transportation Specifications and Procedures.

#### REGULAR SERVICE ENTRANCE

On power-lift equipped vehicles, the step shall be the full width of the step well, excluding the thickness of doors in open position.

~~In addition to the HANDRAIL required in the HANDRAILS section, an additional handrail may be provided on all SPECIALLY EQUIPPED SCHOOL BUSES. This rail shall be located on the opposite side of the entrance door from the rail required in the BUS BODY AND CHASSIS section and shall meet the same requirements for handrails.~~

#### RESTRAINING DEVICES

- ~~1.~~ On power lift-equipped ~~vehicle~~ school buses with a GVWR of 10,000 pounds or more, seat frames may be equipped with attachments points to which belt assemblies can be attached for use with child safety restraint systems (CSRSs) that comply with FMVSS No. 213, Child Restraint System. ~~or devices to which belts, restraining harnesses or other devices may be attached. Attachment framework or anchorage devices, if installed, shall conform to~~ Any belt assembly anchorage shall comply with FMVSS No. 210, Seat Belt Assembly Anchorages.
- ~~1.2.~~ Alternatively, a child restraint anchorage system that complies with FMVSS No. 225, Child Restraint Anchorage Systems, may be installed.
- ~~2.3.~~ Seat belt assemblies, if installed, shall conform to FMVSS No. 209, Seat Belt Assemblies.
- ~~3.4.~~ Child restraint systems, which are used to facilitate the transportation of children who, in other modes of transportation would be required to use a child, infant, or booster seat, shall conform to FMVSS No. 213.

#### SEATING ARRANGEMENTS

Flexibility in seat spacing to accommodate special devices shall be permitted to meet passenger requirements. All seating shall be forward-facing.

~~This seating arrangement provision shall apply to all new specially equipped school buses, any older buses modified or retrofitted to carry wheelchairs/mobile seating device(s), and any older specially equipped buses whose wheelchair/mobile seating device positions are retrofitted or modified, after August 15, 1993. This provision shall apply retroactively to all specially equipped school buses after August 15, 1998.~~

#### SECUREMENT/RESTRAINT SYSTEM FOR WHEELCHAIR/MOBILITY AID AND OCCUPANT

For purposes of understanding the various aspects and components of this section, the term securement and tie down and the phrases securement system or tie down system is used exclusively about the device that anchors the wheelchair to the vehicle. The term wheelchair tie down and occupant restraint system (WTORS) is used to refer to the total system used that secures and restrains both the wheelchair and the wheelchair occupant. Add national

1. ~~WTORS general requirements:~~

- ~~a. The Wheelchair/Mobility Aid Securement and Occupant Restraint System shall be designed, installed, and operated to accommodate passengers in a forward-facing orientation within the bus and shall comply with all applicable requirements of FMVSS 222, School Bus Passenger Seating and Crash Protection, and SAE J2249, Wheelchair Tie down and Occupant Restraint Systems for use in Motor Vehicles. Gurney type devices shall be secured parallel to the side of each bus.~~
- ~~b. The WTORS, including the anchorage track, floor plates, pockets, or other anchorages shall be provided by the same manufacturer, or be certified to be compatible by manufacturers of all equipment/systems used.~~
- ~~c. When a wheelchair/mobility aid securement device and an occupant restraint share a common anchorage, including occupant restraint designs that attach the occupant restraint to the securement device or the wheelchair/mobility aid, the anchorage shall withstand the loads of both the securement device and occupant restraint applied simultaneously, in accordance with FMVSS 222.~~
- ~~d. When a wheelchair/mobility aid securement device (webbing or strap assembly) is shared with an occupant restraint, the wheelchair/ mobility aid securement device (webbing or strap assembly) shall withstand a force twice the amount as specified in 4.4(a) of FMVSS 209.~~
- ~~e. The bus body floor and sidewall structures where the securement and restraint system anchorages are attached shall have equal or greater strength than the load requirements of the system(s) being installed.~~
- ~~f. The occupant restraint system shall be designed to be attached to the bus body either directly or in combination with the wheelchair/mobility aid securement system, by a method, which prohibits the transfer of weight or force from the wheelchair/mobility aid to the occupant in the event of an impact.~~
- ~~g. When an occupied wheelchair/mobility aid is secured in accordance with the manufacturer's instructions, the securement and restraint system shall limit the movement of the occupied wheelchair/mobility aid to no more than two inches in any direction under normal driving conditions.~~
- ~~h. The securement and restraint system shall incorporate an identification scheme, which will allow for the easy identification of the various components and their functions. It shall consist of one of the following, or combination thereof:~~
  - ~~i. The wheelchair/mobility aid securement (webbing or strap assemblies) and the occupant restraint belt assemblies shall be of contrasting color or color shade.~~
  - ~~ii. The wheelchair/mobility aid securement device (webbing or strap assemblies) and occupant restraint belt assemblies shall be clearly marked to indicate the proper wheelchair orientation in the vehicle, and the name and location for each device or belt assembly, i.e., front, rear, lap belt, shoulder belt, etc.~~
- ~~i. All attachment or coupling devices designed to be connected or disconnected frequently shall be accessible and operable without the use of tools or other mechanical assistance.~~
- ~~j. All securement and restraint system hardware and components shall be free of sharp or jagged areas and shall be of a non-corrosive material or treated to resist corrosion in accordance with section 4.3(a) of FMVSS 209.~~
- ~~k. The securement and restraint system shall be located and installed such that when an occupied wheelchair/mobility aid is secured, it does not block access to the lift door.~~
- ~~l. A device for securement and restraint storage system shall be provided. When the system is not in use, the system shall be kept in a securely contained storage device. The storage container shall allow for clean storage, and shall provide reasonable protection from vandalism, and shall enable the system to be readily accessed for use.~~
- ~~m. The entire securement and restraint system, including the storage device, shall meet the flammability standards established in FMVSS302.~~
- ~~n. Each securement device (webbing or strap assembly) and restraint belt assembly shall be permanently and legibly marked or incorporate a non-removable label or tag which states that it conforms to all applicable FMVSS requirements, as well as, the current National Standards for School Buses. In~~

addition, the system manufacturer, or an authorized representative, upon request by the original titled purchaser, shall provide a notarized Certificate of Conformance, either original or photocopied, which states that the wheelchair/mobility aid securement and occupant restraint system meets all the requirements as specified in FMVSS 222 and the current National School Transportation Specifications and Procedures.

~~o. The following information shall be provided with each vehicle equipped with a securement and restraint system:~~

~~i. A phone number where information can be obtained about installation, repair, and parts. (Detailed written instructions and a parts list shall be available upon request.)~~

~~ii. Detailed instructions regarding use, including a diagram showing the proper placement of the wheelchair/mobility aids and positioning of securement devices and occupant restraints, including correct belt angles.~~

~~p. The system manufacturer shall make available training materials to ensure the proper use and maintenance of the wheelchair/mobility aid securement and occupant restraint system. These may include instructional videos, classroom curriculum, system test results, or other related materials.~~

## ~~2. Wheelchair/mobility Aid Securement System~~

~~a. Each securement system location shall consist of a minimum of four anchorage points. A minimum of two anchorage points shall be in front of the wheelchair/mobility aid and a minimum of two anchorage points shall be in the rear. The securement anchorages shall be attached to the floor of the vehicle and shall not interfere with passenger movement or present any hazardous condition.~~

~~b. Each securement system location shall have a minimum clear floor area of 30 inches x 48 inches. Additional floor area may be required for some applications. Consultation between the user and the manufacturer is recommended to ensure adequate area is provided.~~

~~c. The securement system shall secure common wheelchair/mobility aids and shall be able to be attached easily by a person having average dexterity and who is familiar with the system and wheelchair/mobility aid.~~

~~d. As installed, each securement anchorage shall withstand a minimum force of 3,000 pounds (13,344 Newton's) when applied as specified in FMVSS 222. When more than one securement device share a common anchorage, the anchorage shall withstand the force indicated above, multiplied by the number of securement devices sharing that anchorage.~~

~~e. Each securement device, if incorporating webbing or a strap assembly, shall comply with the requirements for Type 1 safety belt systems, in accordance with sections 4.2, 4.3, and 4.4(a) of FMVSS 209.~~

~~f. The securement system shall secure the wheelchair/mobility aid in such a manner that the attachments or coupling hardware will not become detached when any wheelchair/mobility aid component deforms, when one or more tires deflate, and without intentional operation of a release mechanism (e.g., a spring clip on a securement hook).~~

~~g. Each securement device (webbing or strap assembly) shall withstand a minimum force of 2,500 pounds when tested in accordance with FMVSS 209.~~

~~h. Each securement device (webbing or strap assembly) shall provide a means of adjustment, of manufacturer's design, to remove slack from the device or assembly.~~

## ~~3. Occupant Restraint System~~

~~a. A Type 2A occupant restraint system, which meets all applicable requirements of FMVSSs 209 and 210, shall provide for restraint of the occupant.~~

~~b. The occupant restraint system shall be made of materials, which do not stain, soil, or tear an occupant's clothing, and which are resistant to water damage and fraying.~~

~~c. Each restraint system location shall have not less than one anchorage, of manufacturer's design, for the upper end of the upper torso restraint.~~

~~i. The anchorage for each occupant's upper torso restraint shall withstand a minimum force of~~

1,500 pounds (6,672 Newton's) when applied as specified in FMVSS

222. (See 49 CFR 571.222, S5.4.3, S5.4.4). If the upper torso belt anchorage is higher than 44", measured from the vehicle floor, an adjustment device as part of the occupant restraint system shall be supplied.

d. Each wheelchair/mobility aid location shall have not less than two floor anchorages for the occupant pelvic and the connected upper torso restraint:

i. Each floor anchorage shall withstand a minimum force of 3,000 pounds (13,344 Newton's) when applied as specified in FMVSS 222.

ii. When more than one occupant restraint shares a common anchorage, the anchorage shall withstand a minimum force of 3,000 pounds (13,344 Newton's) multiplied by the number of occupant restraints sharing the common anchorage in accordance with FMVSS 222.

e. Each floor and wall anchorage which secures the occupant restraint to the vehicle and which is not permanently attached, shall be of a "positive latch" design, and shall not allow for any accidental disconnection.

#### 4. Dynamic Testing

a. The wheelchair/mobility aid securement and occupant restraint system shall be subjected to, and successfully pass, a dynamic sled test at a minimum impact speed/deceleration of 30 mph/20g's.

b. The dynamic test shall be performed by experienced personnel using an impact simulator with proven ability to provide reliable, accurate, test results that can be replicated.

c. The dynamic test shall be performed in accordance with the procedures set forth in Appendix A of SAE J2249 "Test for Frontal Impact Crash Worthiness."

d. The wheelchair/mobility aid used for testing purposes shall be a rigid, reusable surrogate wheelchair that complies with the requirements of Appendix D of SAE J2249 "Specification for Surrogate Wheelchair."

e. The dynamic test shall be performed using system assemblies, components and attaching hardware that are identical to the final installation in type, configuration and positioning. The body structure at the anchorage points may be simulated for the sled test.

f. When tested, the wheelchair/mobility aid securement and occupant restraint system shall pass the criteria specified in Section 6.2 of SAE J2249 "Performance Requirements of Frontal Sled Impact Test." Following is an abridged summary of the criteria:

i. Retain the test dummy in the test wheelchair and on the test sled with the test wheelchair in an upright position;

ii. Does not show any fragmentation or complete separation of any load carrying part;

iii. Does not allow the horizontal excursions of the test dummy and the test wheelchair to exceed specified limits;

iv. Prevent the test wheelchair from imposing forward loads on the test dummy; and

v. Allow removal of the test dummy and the test wheelchair, after the test, without the use of tools.

#### 1. WTORS — general requirements:

a. A WTORS installed in specially-equipped school buses shall be designed, and operated for use with forward-facing wheelchair-seated passengers and shall comply with all applicable requirements of FMVSS No. 222, School Bus Passenger Seating and Crash Protection, and SAE J2249, Wheelchair Tiedown and Occupant Restraint Systems for Use in Motor Vehicles. An ANSI/RESNA WC18-compliant WTORS may be specified when transporting a wheelchair that is fully compliant with WC19 (2012), which includes a crash tested wheelchair anchored pelvic belt;

Note: Floor anchors must provide adjustability when transporting all types and sizes of wheelchairs.

b. Wheelchair securement positions shall be located such that wheelchairs and their occupants do not block access to the lift door or exits;

c. A device for storage of the WTORS shall be provided. When the system is not in use, the storage device shall allow for clean storage of the system, shall keep the system securely contained within the passenger compartment, shall provide reasonable protection from vandalism, and shall enable the

- system to be readily accessed for use;
- d. The WTORS, including the storage device, shall meet the flammability standards established in FMVSS No. 302, Flammability of Interior Materials;
  - e. The following information shall be provided with each vehicle equipped with a securement and restraint system:
    - i. A phone number where information can be obtained about installation, repair, and parts. (Detailed written instructions and a parts list shall be available upon request.);
    - ii. Detailed instructions regarding use, including a diagram showing the proper placement of the wheelchair/mobility aids and positioning of securement devices and occupant restraints, including correct belt angles;
  - f. The WTORS manufacturer shall make training materials available to ensure the proper use and maintenance of the WTORS. These may include instructional videos, classroom curriculum, system test results, or other related materials;
2. Wheelchair Securement/Tiedown: (See 49 CFR 571.222, S5.4.1, S5.4.2.) Each wheelchair position in a specially equipped school bus shall have a minimum clear floor area of 30 inches laterally by 48 inches longitudinally. Additional floor area may be required for some wheelchairs. Consultation between the user and the manufacturer is recommended to ensure that adequate area is provided;
  3. Occupant restraint system: (See 49 CFR 571.222, S5.4.3, S5.4.4.) If the upper torso belt anchorage is higher than 44 inches measured from the vehicle floor, an adjustment device, as part of the occupant restraint system, shall be supplied.

#### SPECIAL LIGHT

Doorways in which lifts are installed shall ~~have for use during lift operation a special light providing a be~~ equipped with a special interior light that is located above the lift and provides a minimum of two foot-candles of illumination measured on the floor of the bus immediately adjacent to the lift ~~during lift operation and on the lift when deployed at the vehicle floor level.~~

#### SPECIAL SERVICE ENTRANCE

1. Power lift-equipped bodies shall have a special service entrance to accommodate the power lift.  
**Exception:** If the lift is designed to operate within the regular service entrance, and is capable of stowing such that the regular service entrance is not blocked in any way, and that persons entering or exiting the bus are not impeded in any way, a special service entrance shall not be required.
2. The special service entrance and door shall be located on the right side of the bus and shall be designed so as not to obstruct the regular service entrance.  
**Exception:** A special service entrance and door may be located on the left side of the bus if, and only if, the bus is used primarily to deliver students to the left side of one way streets and its use is limited to that function.
3. The opening may extend below the floor through the bottom of the body skirt. If such an opening is used, reinforcements shall be installed at the front and rear of the floor opening to support the floor and give the same strength as other floor openings.
4. A drip molding shall be installed above the opening to effectively divert water from entrance.
5. Door posts and headers from entrance shall be reinforced sufficiently to provide support and strength equivalent to the area of the side of the bus not used for special service entrance.

#### SPECIAL SERVICE ENTRY DOORS

1. A single door or double doors may be used for the special service entrance.
2. A single door shall be hinged to the forward side of the entrance unless doing so would obstruct the regular service entrance. If, due to the above condition, the door is hinged to the rearward side of the doorway, the door shall utilize a safety mechanism, which will also prevent the door from swinging open should the primary door latch fail to operate properly. If double doors are used the system shall be

designed to prevent the door(s) from being blown open by the wind resistance created by the forward motion of the bus, and/or incorporate a safety mechanism to provide secondary protection should the primary latching mechanism(s) fail.

3. All doors shall have positive fastening devices to hold doors in the open position.
4. All doors shall be weather sealed.
5. When manually-operated dual doors are provided, the rear door shall have at least a one-point fastening device to the header. The forward-mounted door shall have at least three one-point fastening devices. One shall be to the header, one to the floor line of the body, and the other shall be into the rear door. The door and hinge mechanism shall be of a strength that is greater than or equivalent to the emergency exit door.
6. Door materials, panels and structural strength shall be equivalent to the conventional service and emergency doors. Color, rub rail extensions, lettering and other exterior features shall match adjacent sections of the body.
7. Each door shall have windows set in rubber, which are visually similar in size and location to adjacent non-door windows. Glazing shall be of same type and tinting (if applicable) as standard fixed glass in other body locations.
8. Door(s) shall be equipped with a device that will actuate an audible or flashing signal located in the driver's compartment when door(s) is not securely closed and ignition is in "on" position.
9. A switch shall be installed so that the lifting mechanism will not operate when the lift platform door(s) is closed.
10. Special service entrance doors shall be equipped with padding at the top edge of the door opening. Padding shall be at least three inches wide and one inch thick and extend the full width of the door opening.

#### SUPPORT EQUIPMENT AND ACCESSORIES

1. Each bus which is set up to accommodate wheelchair/mobility aids or other assistive or restraint devices which utilize belts, shall contain at least one belt cutter properly secured in a location within reach of the driver while belted into his/her driver's seat. The belt cutter shall meet the requirements listed in the Bus Body and Chassis section.
2. Each special equipped school bus that is set up to accommodate wheelchairs or other assistive restraint devices ~~should~~ shall be equipped with an emergency evacuation device that is certified and tested to withstand at least a 300-pound load when used as an emergency stretcher or drag. This evacuation device shall be properly secured to the bus in a location to be determined by the purchaser.
3. Special equipment or supplies that are used on the bus for mobility assistance, health support, or safety purposes shall meet any local, federal, or engineering standards which may apply, including proper identification. Equipment which may be used for these purposes includes, but is not limited to:
  - a. Wheelchairs and other mobile seating devices;
  - b. Crutches, walkers, canes, and other ambulating devices; and
  - c. Medical support equipment. This may include respiratory devices such as oxygen bottles (which should be no larger than 22 cubic feet for liquid oxygen and 38 cubic feet for compressed gas), or ventilators. (If transporting oxygen, refer to AMD Standard 003.) Tanks and valves shall be located and positioned to protect them from direct sunlight, bus heater vents, or other heat sources. Other equipment may include intravenous and fluid drainage apparatus.
4. All portable equipment and special accessory items, including the equipment listed above, shall be secured at the mounting location to withstand a pulling force of five times the weight of the item, or shall be retained in an enclosed, latched compartment. The compartment shall be capable of withstanding forces applied to its interior equal to five times the weight of its contents without failure to the box's integrity and securement to the bus.

**Exception:** If these standards provide specific requirements for securement of an equipment type, the specific standard shall prevail (i.e., wheelchairs).



## TECHNOLOGY AND EQUIPMENT, NEW

It is the intent of these ~~standards~~ School Bus Standards to accommodate new technologies and equipment that will better facilitate the transportation of students with special needs. When a new technology, piece of equipment, or component is desired to be applied ~~for use in specially-equipped vehicles to the school bus, and it meets the following criteria~~, it may be acceptable ~~if~~:

1. ~~It~~ The technology, equipment, or component ~~shall~~ does not compromise the effectiveness or integrity of any major safety system, unless it completely replaces the system. (Examples of safety systems include, but are not limited to, compartmentalization, the eight light warning lights system, emergency exits, and the uncluttered, approved yellow color scheme.)
2. ~~It shall~~ The technology, equipment, or component does not diminish the safe environment of the interior of the bus.
3. ~~It shall~~ The technology, equipment, or component does not create additional risk to students who are boarding or exiting the bus or are in or near the school bus loading zone.
4. ~~It shall~~ The technology, equipment, or component does not create undue additional activity and/or responsibility for the driver.
5. ~~It shall~~ The technology, equipment, or component generally increases efficiency and/or safety of the bus, or generally provides for a safer or more pleasant experience for the occupants and pedestrians near the bus, or generally assists the driver or makes his/her many tasks easier to perform.

## TYPE "E" SCHOOL BUSES

### INTRODUCTION

~~As of July 1<sup>st</sup>, 2017, schools are allowed to purchase a Type E vehicle as defined by 20-10-101, MCA.~~ The following general vehicle requirements, recommended guidelines, and operational guidelines apply only to Itype E school buses.

### GENERAL VEHICLE REQUIREMENTS

These requirements apply only to school bus Itype E.

1. The school bus must be purchased on or after July 1, 2017.
2. Before a Itype E school bus is purchased, the school is required to complete a cost analysis of a traditional Itype A—D school bus versus the Itype E school bus before acquiring this bus type. This cost analysis must be on file for review.
3. The vehicle purchased must meet the Five Star ~~National Highway Traffic Safety Administration (NHTSA)~~ rating, please visit [NHTSA](#).
4. The vehicle does not have to be new assuming all the conditions listed in MCA and the School Bus Standards are met.
5. The manufacturer's rated capacity of this vehicle, which shall be determined only by the ~~original equipment manufacturer (OEM)~~ on the date of manufacture, shall not exceed **ten** persons including the driver.
6. The vehicle is required to have a backup alarm.
7. The capacity rating may not be changed or modified.
8. Alteration of this vehicle, following manufacture by the OEM, is prohibited, with the exception of a backup alarm. This includes, but is not limited to, the addition or removal of seats, ramps, wheelchair securement devices and power lifts.
9. Wheelchair accessible Itype E school buses must be manufactured to transport wheelchairs and have a Five Star NHTSA rating.
10. The only alteration exception allowed is when OEM options or other manufacturer's accessories not in violation of these standards are installed by the original manufacturer.
11. The vehicle shall not carry more passengers than there are seat belts as installed by the manufacturer.
12. The vehicle shall not be painted the color known as national school bus glossy yellow.
13. The vehicle shall not be equipped with a stop arm or flashing warning signal lamps.

14. The vehicle must have four doors.
15. The vehicle must meet structural integrity as determined by the school Board of Trustees.
16. Trailer hitches are allowed on Type E vehicles in accordance with the manufacturer's rated towing capacity. When the vehicle is used as a Type E school bus, students are not allowed to be transported in the vehicle when the vehicle is being used to tow.
17. The vehicle is required to have a back-up camera and event data recorder (EDR) device if newly purchased.
18. Any window tinting must comply with state laws.
19. Any storage systems must be properly tied down.

## RECOMMENDED GUIDELINES

The following guidelines are recommended procedures for Itype E school buses only.

1. Review vehicle before purchase and have proof vehicle is accident free by a vendor who uses National Motor vehicle title information system. This recommendation is in place for school district staff ensure there is no structural damage to the vehicle due to an accident.
2. It is highly recommended to purchase a vehicle that is white.
3. It is highly recommended to purchase a vehicle with the following features: automatic crash notification system, pedestrian auto braking system, forward collision warning system, lane departure warning system, and blind spot detection.

## OPERATIONAL REQUIREMENTS

The following requirements apply to Itype E school buses only.

1. This vehicle must load and unload students off the traveled portion of the roadway and students shall not load or unload the vehicle using the door facing traffic. Students shall not walk around the front or rear of the vehicle or open the vehicle's driver side rear passenger door to load or unload.
2. Prohibited bus stops should follow the same restrictions as list in PROHIBITED SCHOOL BUS STOPS.
3. The vehicle, while transporting students to and from school, shall display three signs, one sign visible to the rear and one sign on each side of the vehicle, with the words "SCHOOL BUS." The sign shall be national school bus glossy yellow with reflective black letters and a minimum of 4 inches high and does not have to be on the same line vertically. The sign shall be a type that can be removed, dismantled, or covered when the vehicle is not transporting pupils to and from school.
4. Compliance with all Montana laws regarding vehicle seatbelt and restraint is required.
5. This vehicle Itype E will not stop at railroads as this will create more confusion to the general public.
6. It is highly recommended all Itype E school buses have staff trained on how to install child restraint system by a safety seat certified technician. Technicians available across the state can be found at [NHTSA Child Passenger Seat Inspections](#) found at [NHTSA Car Seats](#).
7. All driver requirements apply to school bus drivers of the Itype E school bus with the exception of requiring a Commercial Driver's License (CDL) with endorsements. A standard Montana driver's license is acceptable. All other rules, including drug and alcohol testing, apply. See BUS DRIVER QUALIFICATIONS.

## ALTERNATIVE FUELS

### INTRODUCTION

This standard is designed to be used as an overview of the alternative fuels being utilized for school transportation. The standard is not designed to replace current applicable federal, state, manufacturing or safety standards that may exceed requirements within this standard. There will be advancements in engineering and improvements in equipment fabrication methods and operating practices that differ from those specifically called for in this standard. Such deviations or improvements may provide safety and may meet the intent of and be compatible with this standard. Entities wishing to purchase alternative fuel school buses should use this section only as a starting point. More detailed specifications, including specific design and performance criteria and safety standards, should be researched by prospective purchasers of alternative fuel school buses.

## GENERAL REQUIREMENTS

Alternative fuel school buses shall meet the following requirements:

1. Chassis shall meet all standards previously mentioned in Bus Chassis Standards;
2. Chassis shall meet all applicable FMVSS standards;
3. Fuel system integrity shall allow zero (0) leakage when impacted by a mobile barrier in accordance with test conditions specified in FMVSS No. 301 or FMVSS No. 303, as applicable;
4. ~~Original Equipment Manufacturers (OEMs)~~ and conversion systems using ~~Compressed Natural Gas (CNG)~~ shall comply with NFPA Standard 52-2013, "Compressed Natural Gas Vehicular Fuel Systems". Fuel systems using ~~liquefied petroleum gas (LPG)~~ shall comply with the NFPA Standard 58-2014 "Liquefied Petroleum Gases Engine Fuel Systems" in effect at the time of installation.
5. Fuel tank(s) for vehicles of less than 54 passenger capacity powered by LPG or CNG shall have a minimum 40-gallon capacity. Fuel tank(s) for vehicles of 54 or more passenger capacity powered by LPG or CNG shall have a minimum 60-gallon capacity.
6. Natural gas-powered buses may be equipped with an interior/exterior gas detection system. All natural gas-powered buses may be equipped with a fire detection and suppression system;
7. All materials and assemblies used to transfer or store alternative fuels shall be installed outside the passenger/driver compartment;
8. All Type C and D buses using alternative fuel shall meet the same base requirements of BUS CHASSIS STANDARDS for power and grad ability, i.e., at least one published net horsepower per each 185 pounds of GVWR;
9. The total weight shall not exceed the GVWR when loaded to the rated capacity;
10. The manufacturer supplying the alternative fuel equipment must provide the owner and operator with adequate training and certification in fueling procedures, scheduled maintenance, troubleshooting, and repair of alternative fuel equipment;
11. All fueling equipment shall be designed specifically for fueling motor vehicles and shall be certified by the manufacturer as meeting all applicable federal, state and industry standards;
12. All on-board fuel supply containers shall meet all appropriate requirements of the ASME code, the DOT regulations, or applicable FMVSS and NFPA Standards;
13. All fuel supply containers shall be securely mounted to withstand a static force of eight times their weight in any direction;
14. All safety devices that may discharge to the atmosphere shall be vented to the outside of the vehicle. The discharge line from the safety relief valve on all school buses shall be in a manner appropriate to the characteristics of the alternative fuel. Discharge lines shall not pass through the passenger compartment;
15. CNG buses shall have a positive quick acting (1/4 turn) shut-off control valve shall be installed in the gaseous fuel supply lines as close to the fuel supply containers as possible. The controls for this valve shall be placed in a location easily operable from the exterior of the vehicle. The location of the valve control shall be clearly marked on the exterior surface of the bus; ~~and~~
16. A grounding system shall be required for grounding of the fuel system during maintenance related venting.
17. Fuel systems identified as compatible with bio-diesel must be provided with components compatible with Bio-Diesel/biodiesel conforming to the specifications of ASTM 6751, Biodiesel Standards;-
- 17.18. High-Voltage-Battery-Electric-Powered Vehicles: Buses utilizing a high-voltage propulsion system (more than 48 nominal volts) shall meet FMVSS and all Society of Automotive Engineers (SAE) standards at the time of manufacture. Additionally:
  - a. The propulsion power source (batteries, fuel cells, etc.) shall be located outside the passenger compartment;
  - b. The propulsion power source enclosure shall be constructed to conform to the power source manufacturer's requirements and recommendations;
  - c. Charging connection point shall be outside the passenger compartment;
  - d. While charging, the transmission/propulsion system shall be rendered inoperable;

- e. There shall be a disconnect switch to shut off the high-voltage components; and
- f. Battery packs shall be appropriately heated and cooled.

## **OPERATIONSSPECIFICATION FOR SCHOOL BUS INSPECTION**

### **INTRODUCTION**

~~The success of any school transportation operation depends largely on the performance and degree of dedication displayed by those involved. These recommendations and requirements are designed to assist state agencies, school and Head-start administrators and private operators in understanding their pupil transportation programs and developing applicable policies, including those for transporting students with special needs.~~

~~The school bus is an extension of the classroom and as such, the ride to school should be safe and efficient in an atmosphere conducive to learning readiness. Open and honest communication between all stakeholders is vital for the success of the transportation program. Transportation is critical to the education process, and the school bus is the safest form of transportation. Therefore, transportation to and from school on a school bus shall be offered to all eligible students. In eligible situations, individual transportation contracts for vehicles that are not school buses can be approved.~~

~~Districts or the governing body responsible for pupil transportation shall have an eligibility policy, which takes safety into account, addressing distances from school for different age groups. If transportation eligibility is maximized, the result will be more students on buses, and therefore, safer access to students' educational opportunities. The sole criterion used to establish transportation eligibility should not be only the distance between a student's home address and the student's school of attendance; rather, travel to and from school must consider various criteria. Safety must be the primary concern, and criteria should consider the ages of students and potentially hazardous situations, such as roadway and walk pathway conditions, speed limits, railroad crossings, lighting conditions, etc. The criteria should also consider students' levels of maturity, grade levels, cognitive and physical abilities. Similar criteria should be used in establishing maximum distances between a student's home and the assigned bus stop per district guidelines.~~

### **SEMI-ANNUAL BUS INSPECTIONS**

1. The Highway Patrol shall perform the semiannual inspection of school buses, one of which shall be at least 30 days prior to the beginning of the school term, and re-inspect the buses, if necessary, before the beginning of the school term. The second inspection shall be performed-conducted by January 31.
2. The Highway Patrol's inspection shall determine if the school buses meet the minimum standards for school buses as adopted by the Board of Public Education.
3. Only school buses that pass inspection may be used to transport students and only school buses that pass inspection will receive state and county transportation reimbursement. A school bus that fails to pass inspection shall not transport students on routes and will not be eligible for state and county reimbursement until the bus is re-inspected and approved by the inspecting officer.

NOTE: The school district is responsible for contacting the Montana Highway Patrol for bus inspections. Nothing in this rule precludes the Montana Highway Patrol from inspecting school buses at other times as the Highway Patrol sees fit.

4. Buses that are placed in operation after the school semester has begun must be inspected and approved by the Montana Highway Patrol before the vehicle is operated on the established route.

### **STATE ADMINISTRATION**

#### **1.—Superintendent of Public Instruction**

- a. ~~The Superintendent of Public Instruction shall provide leadership and guidance as defined in MCA-20-10-112.~~

#### **2.—State Pupil Transportation Director**

- a. ~~The state pupil transportation director's specific duties may include, but are not limited to:~~
  - i. ~~Assisting in the implementation, interpretation and understanding of pupil transportation laws, regulations and policies;~~

- ii. ~~Supervising the preparation of manuals, handbooks and information for distribution to local transportation personnel and private operators;~~
- iii. ~~Providing assistance and direction to local school administrators on request;~~
- iv. ~~Assisting local personnel in planning and conducting pupil safety education programs;~~
- v. ~~Requiring and maintaining appropriate reports and records;~~
- vi. ~~Assisting/consulting with groups involved in pupil transportation safety;~~
- vii. ~~Representing the interests of the pupil transportation industry;~~
- viii. ~~Working cooperatively with school transportation associations, school districts, parents and private contractors to promote school bus safety and efficiency; and~~
- ix. ~~Managing the state's Pupil Transportation Program, which includes planning, budgeting and forecasting requirements for the operation.~~

~~The state Director of Pupil Transportation should be an active member of regional and national organizations and should participate in activities that promote student transportation safety.~~

#### USE OF BUS AUDIO/VIDEO MONITORING SYSTEMS

School systems should promulgate, communicate and enforce policies and procedures to be followed when using on-board audio/video monitoring systems. ~~The Audio/video camera monitoring~~ on a school bus shall be used only as an aid to monitor and record student and driver behavior. It should not replace the discipline policy, the authority of the driver, or the responsibility of the school officials.

The basic safe riding rules must prevail and the consequences of misconduct must be carried out. All students and drivers shall be notified that they are subject to being recorded on the school bus at any time. Notification to parents of all students shall be made by the school district. Prior to actual ~~taping recording~~, parents and students shall be advised that violation of acceptable student conduct is prohibited by state and school district student disciplinary code and will result in appropriate consequences as defined in policy. ~~The actual taping shall be audio and video.~~

Ongoing notification regarding videotaping audio/video recording must occur, addressing the continued need for personal awareness of safety issues. This communication is particularly important to warn against a false sense of security, especially when cameras are moved between buses. Newsletters, student handouts, and notices posted in the bus should be considered.

If audio/video cameras monitoring systems are to be used for monitoring drivers, school systems should promulgate, communicate and enforce policies and procedures to be followed when using on-board audio/video monitoring systems. The drivers must be notified as to the extent of their use and for what purpose they will be used. Cameras should be scheduled on a rotation basis so as not to select only certain buses, unless the school is able to monitor all school bus activity without requiring a rotation plan. Based on the number of incidents of misconduct or the seriousness of these reports, recording of a bus route may be done more frequently. The transportation supervisor may decide if more frequent monitoring is needed. Such additional monitoring is meant to supplement the written disciplinary reports by the bus driver, not take the place of reports.

After videotaping has been conducted, the recordings are to be stored at a secure location for a period designated by the local school district, unless a specific recording is being used in an ongoing action. The transportation supervisor or designee shall periodically review the recordings randomly selected to ensure proper pupil conduct. If no incidents are reported within a period defined by local policy, the recording will be recycled. If incidents are reported, or if incidents are viewed during random selection, the recordings are to be kept until final resolution and time for any appeals. Recordings must be dated and have the bus number and driver's name to ensure proper identification. A log shall be maintained on the use of the video camera.

When action is taken because of information obtained from the recording, the driver, supervisor, school administrator, student, and parents or guardians will be contacted. A meeting of the aforementioned parties may be necessary to achieve a resolution of the problem. The recording may be used as evidence in that meeting. All requests for review shall be made in writing. Each district must designate, by policy, persons allowed to review the recording.

#### SCHOOL DISTRICT BOARD AND ADMINISTRATION

The School District's Board and Administrative duties shall include but are not limited to:

1. Understanding and implementing pupil transportation laws, regulations, and policies;
2. Planning and conducting pupil safety education programs as needed;
3. Maintaining adequate records and filing appropriate reports; and,
4. Working to promote school bus safety and efficiencies, including planning and conducting a school bus driver training program.

#### BUS DRIVER QUALIFICATIONS

A driver of a school bus is qualified to drive a school bus if the driver:

1. is not less than 18 years of age;
2. is of good moral character;
3. is the holder of a commercial driver's license;
4. has filed with the district a satisfactory medical examination report, on a form approved by the United States Department of Transportation, signed by any physician licensed in the United States or, if acceptable to an insurance carrier, any licensed physician;
5. has completed a basic first aid and CPR course, and holds a valid basic first aid and CPR certificate from an authorized instructor. The issuance of the certificate is governed by rules established by the Superintendent of the Office of Public Instruction, if the rules may suspend this requirement for a reasonable period if there has been an inadequate opportunity for securing the basic first aid course and certificate.
- ~~5-6.~~ has completed a fingerprint-based background check, as required in 20-3-323, MCA. This requirement applies to any transportation staff who may be responsible for, or alone with, students during routes or activity trips and is designed to help ensure student safety and reduce liability for school districts.
- ~~6-7.~~ has complied with any other qualifications established by the Board of Public Education; and
- ~~7-8.~~ has filed with the County Superintendent a certificate from the Trustees of the district for which the school bus is to be driven, certifying compliance with the driver qualifications enumerated

Bus Drivers are also required to the following:

1. Have a minimum of five years of licensed driving experience;
2. no record of criminal offenses indicating they may be dangerous to children, as evidenced by a criminal background check provided to and approved by the school district prior to initial employment;
3. a safe driving record, which may not have evidence of any of the following:
  - a. more than one moving traffic violation within any 12-month period of the preceding 36 months;
  - b. any conviction for driving under the influence of alcohol or drugs within the preceding 36 months; or
  - c. a conviction resulting in mandatory revocation or suspension of a driver's license in the previous five years.

#### BUS DRIVER LICENSING

1. A Commercial Driver's License (CDL) with an School Bus "S" and Passenger "P" endorsement is required when a person who drives a school bus, or who transports ~~pre-primary~~ early childhood education, primary, or secondary school students for school-related activity trips, field trips, and operating on an approved route, in a commercial motor vehicle. The "S" endorsement shall be required for any school bus, including



16 passengers and less, and 16 passengers and more.

2. Drivers of school bus Itype E are not required to have a CDL license or endorsement. All other requirements set forth in this section are applicable to all school bus drivers.

## LIMITING THE USE OF ELECTRONIC DEVICES

### PROHIBITION AGAINST TEXTING

1. No driver shall engage in texting while driving a school bus.
2. ~~Motor carriers. No motor carrier~~ No school district shall allow or require its drivers to engage in texting while driving a school bus.

#### ~~b) Definitions.~~

~~(1) Texting means manually entering into, or reading from, an electronic device.~~

~~(2) Texting includes short message services, e-mailing, instant messaging, a command or request to access a web page, or engaging in any other form of electronic text retrieval or entry, for present or future communication; or~~

~~• Reaching for a hand-held device requiring the bus driver to maneuver so they are no longer in a seated position and restrained by a seat belt~~

~~(2) Driving means operating a commercial motor vehicle, including while temporarily stationary because of traffic, a traffic control device, or other momentary delays. Driving does not include operating a commercial motor vehicle when the driver has moved the vehicle to the side of, or off, a highway and has halted in a location where the vehicle can safely remain stationary.~~

3. Emergency exception. Texting while driving is permissible by drivers of a commercial motor vehicle when necessary to communicate with law enforcement officials or other emergency services.

### PROHIBITION AGAINST USING A HAND-HELD DEVICE

1. ~~(a)~~1. No driver shall use a hand-held device while driving a school bus.
2. 2. ~~School Districts.~~ No school district shall allow or require its drivers to use an electronic device while driving a school bus.

#### ~~(b) Definitions.~~

~~(1) The use of a hand-held device means:~~

~~• using at least one hand to hold a device to use the device. For example, holding a mobile phone or tablet; or~~

~~• Reaching for a hand-held device requiring the bus driver to maneuver so they are no longer in a seated position, restrained by a seat belt~~

~~(2) Driving means operating a commercial motor vehicle, including while temporarily stationary because of traffic, a traffic control device, or other momentary delays. Driving does not include operating a commercial motor vehicle when the driver has moved the vehicle to the side of, or off, a highway and has halted in a location where the vehicle can safely remain stationary.~~

3. Exceptions:
  - a. Route Device. It is permissible to use a tablet or other device to provide a route map for the school bus driver. The tablet or other device must be secured and not hand-held. The driver may not enter information or select more than one button while driving a school bus.
  - b. Emergency. Using a hand-held mobile device is permissible by a school bus driver when necessary to communicate with law enforcement officials or other emergency services.
  - c. Two-way radio. Using a two-way radio device is permissible by a school bus driver when necessary.

### PROHIBITION AGAINST USING EARPHONES

1. ~~(a)~~ No driver shall listen to music, podcast, radio, or other recorded or transmitted music or texts ~~speech~~ while driving a school bus using earphones-, headphones, ear buds, or other bluetooth devices.

#### ~~(b) Definitions.~~

~~(1) Earphones include headphones, ear buds, or other blue tooth device.~~

~~(2)(1) Driving means operating a commercial motor vehicle, including while temporarily stationary because of traffic, a traffic control device, or other momentary delays. Driving does not include operating a commercial motor vehicle when the driver has moved the vehicle to the side of, or off, a highway and has halted in a location where the vehicle can safely remain stationary.~~

~~(3)(2) Emergency exception: Using an earphone is permissible by a school bus driver when necessary to communicate with law enforcement officials or other emergency services.~~

#### DRUG AND ALCOHOL TESTING OF BUS DRIVERS

The 1991 Federal Omnibus Transportation Employee Testing Act (~~FMCSA~~) imposes several requirements on employers of safety sensitive employees. A variety of drug and alcohol tests are required: ~~pre-employment, reasonable suspicion, post-accident, random, return to duty, and follow-up.~~

~~Per FMCSA an employer must do annual random tests of safety sensitive employees at least 25 percent must be tested for alcohol and 50 percent for drugs.~~

~~Testing must meet the standards set by the Federal Department of Health and Human Services. Employees must be provided information on alcohol and drug misuse and the testing requirements.~~

~~Supervisory employees must receive additional training on recognizing substance abuse. The FMCSA rules define what alcohol related conduct is prohibited while performing safety sensitive functions. Please visit [FMCSA](#).~~

~~Employers are responsible for the testing programs. (If a district contracts for its transportation the contractor, not the district, may be the employer. This possibility should be discussed with the contractor and the district's legal counsel.) Testing responsibilities can be met using district employees, contracting for services, or joining a consortium.~~

~~A school bus driver is defined as any who drives district owned, contractor owned, home to school/school to home and all other activity trips. All school bus drivers shall comply with the Federal regulations regarding drug and alcohol testing.~~

#### RAILROAD PROCEDURES

1. A school bus with or without passengers, before crossing at grade any track or tracks of a railroad, shall stop the vehicle as close as practicable but the door not less than 15 feet and no more than 50 feet from the nearest rail of the railroad.
2. While stopped the driver shall open the front door and driver's side window of a school bus, and shall listen and look in both directions along the track for an approaching train or other on-track equipment and for signals indicating the approach of a train or other on-track equipment and may not proceed until the driver can do so safely.
3. Before proceeding past the grade crossing, the driver shall close the front door.
4. The driver may cross only in a gear of the vehicle that requires no changing gears while traversing the crossing. The driver may not shift gears while crossing the track or tracks.
5. A stop need not be made at:
  - a. A streetcar crossing, or railroad tracks used exclusively for industrial switching purposes, within a business district
  - b. A railroad grade crossing when a police officer or crossing flagman directs traffic to proceed.
  - c. A railroad grade crossing controlled by a functioning highway traffic signal transmitting a green indication which, under local law, permits the commercial motor vehicle to proceed across the railroad tracks without slowing or stopping.
  - d. An abandoned railroad grade crossing which is marked with a sign indicating that the rail line is abandoned.
  - e. An industrial or spur line railroad grade crossing marked with a sign reading "Exempt." Such "Exempt"

signs shall be erected only by or with the consent of the appropriate State or local authority.

## DRIVER INSERVICE TRAINING PROGRAM

### Introduction

1. School bus transportation is an integral part of today's educational system. The school bus driver is expected to present a strong role model for children, as well as represent the school district before the public. If the school bus driver is professional and knowledgeable, he will encourage social responsibility among the students. The driver is also able to promote public confidence in the school transportation program. A quality driver training program is critical to the success of a school transportation program.
2. Training Program
  - a. A School Bus Driver Training Program exists to provide cost-effective, quality training that promotes student safety and reduces school bus accidents. The commitment to provide school bus drivers who are safe, competent and well trained should be the goal of every school district. To achieve that goal, each district shall develop and implement a driver-training program that meets the needs of the school district and provides appropriate training to accomplish the goal. The plan shall, upon request, be available for inspection by the Office of Public Instruction. A district approved training program shall include:
    - i. A continuing education program for school bus drivers shall be provided and include at least 15 hours of in-service training annually, which shall include but is not limited to:
      - Pre- and post-trip inspection training and refresher;
      - Passenger boarding and de-boarding procedures;
      - Driving skills;
      - Defensive driving (Montana DR.I.V.E. is encouraged);
      - Railroad safety;
      - Passenger management;
      - Safety and emergency procedures;
      - Special needs sensitivity and awareness;
      - Student safety;
      - Human trafficking awareness training, as required in 20-7-1316, MCA;
      - Rules, policies and procedures affecting student transportation;
      - Mirror usage;
      - Drug and alcohol awareness; and
      - Montana Association for Pupil Transportation (MAPT) Conference or equivalent training is encouraged. (See OPI Pupil Transportation Website for listings at the following site: [www.opi.mt.gov/PupilTransportation/Trainings](http://www.opi.mt.gov/PupilTransportation/Trainings)).
    - ii. A newly hired driver's training program may include but is not limited to:
      - A continuing education program (listed above);
      - The essentials of a crash prevention program, including the uniform school bus crash reporting criteria;
      - A system to communicate procedures between administrators and parents, and between administrators and the school bus company or drivers, including student discipline procedure and compliance;
      - Emergency procedures and/or contingency plans to be followed in the event of a crash, unexpected school closing or unforeseen route change; and
      - The appropriate use of special lighting and signaling equipment. (Refer to Driver In-Service Training.)
  - b. The opportunity to participate in workshops, conferences (MAPT is encouraged) and meetings where drivers can work with and learn from a group of their peers;
  - c. Prior to transporting students with disabilities, the driver shall receive appropriate training in compliance with Individuals with Disabilities Education Act (IDEA) and proper use of adaptive

- equipment; and
- d. Drivers shall receive drug and alcohol education as required in the Omnibus Transportation Employee Testing Act of 1991 located online at [US DOT](#).

#### DISTRICT POLICY GUIDELINES

1. The responsible state agency and the local school district should have clear and concise policies and guidelines for the operation of their pupil transportation programs. These are important for two reasons:
    - a. Policies and guidelines have the effect of law when laws or regulations do not specifically address a situation; and
    - b. Policies and guidelines serve as the rulebook for persons charged with the administration of transportation services within the district.
  2. Once established, these policies and guidelines become the basis for development of operating procedures. This allows decisions about operational details to be made at the administrative level rather than by the school board. These policies and guidelines should be precise and in writing and should cover the following topics:
    - a. Procedures for determining eligibility for transportation;
    - b. A description of all types of transportation provided;
    - c. The days on which service will be available;
    - d. Essential routing constraints, such as walking distances and age/grade of pupils for whom the district will provide transportation;
    - e. The extent of special transportation service;
    - f. The essentials of a crash prevention program, including the uniform school bus crash reporting criteria;
    - g. A system to communicate procedures between administrators and parents, and between administrators and the Bus Company or drivers, including student discipline procedures and compliance;
    - h. Emergency procedures and/or contingency plans to be followed in the event of a crash, unexpected school closing or unforeseen route change; and
    - i. Use of special lighting and signaling equipment as indicated below:
      - i. Use of alternately flashing amber lights to warn motorists that the bus is preparing to stop to take on or discharge students;
      - ii. Use of alternately flashing red lights to inform motorists that the bus is stopped on the roadway to take on or discharge passengers
      - iii. Use of four-way (hazard) flashers when approaching, stopping and crossing at a railway crossing. Do not use the overhead amber lights at a railroad crossing;
      - iv. Operating stop arms in conjunction with the flashing red signal lamps;
      - v. Use of white flashing strobe light to increase the visibility of the school bus on the roadway during adverse visibility conditions; ~~and~~
      - vi. Use of crossing control arms, where directed to encourage children to cross properly in front of school buses; and
      - vii. Driving hours shall be regulated, and documented. All School districts and contractors shall not be exempt from regulations based on the Federal Motor Carrier Safety Regulation 49 CFR 395.3 (15 hours on duty of which no more than 10 hours are driving time; 8 hours continuous off-duty prior to a long trip; no more than 60 hours driving in a week). (This information will be audited.)
- ~~vii-j.~~ Home Parking of School Buses policies and procedures, including but not limited to:
- i. Clear written authorization and annual review of home parking privileges;
  - ii. Documented pre-route check-in protocol;
  - iii. Fitness for duty expectations;
  - iv. Compliance with random suspicion testing requirements; and
  - v. Documentated procedures supporting audit readiness and liability protection.

## ADVERTISING ON A SCHOOL BUS

### Potential Safety Concerns

Advertising on the interior or exterior of a school bus to catch the attention of passing motorists (since that is precisely what advertising is designed to do), runs the inherent risk that passing motorist will focus their attention on the advertising and not notice, for example, that the school bus has stopped, or turned on its flashing lamps, or allowed the students to de-board or board the bus. The potential increase to driver distraction, a known cause of motor vehicle accidents, presents a significant safety issue around school buses that cannot be ignored.

Therefore, any type of advertisement on a school bus shall be prohibited.

## SCHOOL BUS STOPS

### DESIGNATED STOPS

#### School Bus Route Approval

The board of trustees of a school district and the county transportation committee shall approve all school bus routes.

#### School Bus Stops Requiring A Child To Cross a Roadway

The board of trustees of a school district shall approve all school bus stops requiring a child to cross a roadway.

#### Bus Stop Requirements

1. Buses shall stop at designated stops on the approved route only.
2. The school bus driver shall actuate the amber flashing lights approximately 150 feet in cities and approximately 500 feet in other areas before the bus stop to load and unload students on the highway or street. (MCA 61-8-351)
3. The school bus driver shall actuate the red flashing light system only when the school bus is stopped on the highway or street.  
EXCEPTION:
  - a. The board of trustees of a school district may adopt a policy prohibiting the operation of amber or red lights when a school bus is about to stop or stopped to receive or discharge children and the receipt or discharge does not involve street crossing by the children. The lights may not be operated in violation of that policy.
  - b. If a school bus is stopped outside of the roadway and the school bus will receive or discharge children in a location outside the roadway, the school bus may not actuate the flashing red lights as long as the school children do not enter the roadway.  
~~61-8-102(2)(v) states “‘roadway’ means the portion of a highway that is improved, designed, or ordinarily used for vehicular travel, including the paved shoulder.”~~
4. The school bus driver shall not actuate the red flashing light system until the vehicle has come to a complete stop, the transmission is placed in neutral, and the parking brake set.
5. The school bus driver shall not deactivate the flashing light system until the students are seated appropriately, the school bus driver engages the transmission and releases the emergency brake.

## PROHIBITED SCHOOL BUS STOPS

A school bus stop shall not be designated at the following locations:

1. Within 200 ft. of the nearest rail of any railroad crossing or grade, except at railroad stations or on highways that parallel the railroad tracks;
2. The left-hand side of any highway; or
3. On a divided or multiple-lane highway where passengers must cross the highway to board or after exiting the bus, unless traffic is controlled by a traffic officer or official traffic control signal. For the purposes of this subsection, a multiple-lane highway is defined as any highway having two or more lanes of travel in

each direction.

## SPEED LIMITS

Speed limits are an important tool for promoting safety on streets and highways. Driving over the posted speed limit, driving too fast for conditions, or failing to obey special speed limit zones can result in a Montana speeding ticket, points on the driver's license, and even a license suspension or revocation for repeat offenders. All posted speed limits shall be followed without exception.

It is the responsibility of all employees, drivers, and management to assure that the speed limit is adhered to always.

No driver shall drive a school bus at a speed greater than is reasonable or prudent having due regard for weather, visibility, the traffic on, and surface and width of, the highway. In no event, shall a speed endanger the safety of students or property.

## TRANSPORTATION SPECIAL CIRCUMSTANCES

### MCKINNEY- VENTO HOMELESS ASSISTANCE ACT OVERVIEW

The following provides information on how the McKinney – Vento Homeless Assistance Act, Title IX, Part A of the Every Student Succeeds Act, relates to pupil transportation and describes transportation choices and requirements.

### REQUIREMENTS OF THE MCKINNEY-VENTO HOMELESS ASSISTANCE ACT

Local Education Agencies (LEAs) are required to provide students experiencing homelessness with transportation to and from their school of origin at a parent or guardian's request. For an unaccompanied youth, the request may come from the LEA's homeless liaison if the youth is not an adult. Homeless students are subject to the same time and distance limitations as their normally housed peers. However, exceptions should be considered for students living closer to the school than those normally offered transportation if there are safety or health concerns. Exceptions should also be considered for a student outside the distance or time limit dependent on the student's age/grade level and completion of graduation requirements.

### TRANSPORTATION FOR THE HOMELESS IN RELATION TO DISTANCE

Every LEA has a homeless liaison who should, in coordination with the student's family, make the determination of whether the transportation of the student is in the student's best interest. Cost of transportation cannot be used when determining a student's best interest. In accordance with Montana Code, travel time more than 60 miles or one hour, or other circumstances that result in extremely unusual travel demands, may all result in appropriate denial of transportation to the school of origin. Parents may file a formal dispute with the LEA if they disagree with the transportation services offered or when the time and distance limitation impacts the school placement decision.

~~Every LEA has a homeless liaison who should make the determination of whether the transportation of the student is in the student's best interest. Cost of transportation cannot be used when determining a student's best interest. In accordance with Montana Code, travel time more than 60 miles or one hour, or other circumstances that result in extremely unusual travel demands, may all result in appropriate denial of transportation to the school of origin. Parents may file a formal dispute with the LEA if they disagree with the transportation services offered or when the time and distance limitation impacts the school placement decision.~~

### OTHER CONSIDERATIONS REGARDING HOMELESS TRANSPORTATION

Providing sensitivity training to bus drivers and arranging bus stops to keep student's living situations confidential is important in being able to assist these students through this difficult time in their lives with as little disruption as possible. Schools should be aware of hotels/motels, churches, shelters, or other locations



where homeless families and children tend to find temporary housing. Homeless unaccompanied youths who are relying on multiple families for care may need access to multiple bus routes. Developing close ties between school district homeless liaisons, school staff, and pupil transportation staff will help make this process work smoothly.

A school district may be required to provide transportation if a student moves across state lines to secure housing. In such case, a shared transportation arrangement may be utilized, such as meeting the student at the state line, as requirements and reimbursements are based on in-state transportation.

#### SCHOOL DISTRICT RESPONSIBILITIES FOR TRANSPORTATION COSTS WHEN A HOMELESS STUDENT REQUIRES TRANSPORTATION ACROSS DISTRICT BOUNDARIES

When a homeless student requires transportation to the school of origin, and that school is outside the current school district, the two school districts involved should collaborate to determine which district is going to assume responsibility for transportation and for how the cost is to be shared. If there is no agreement between the two school districts, the responsibility and cost for transportation shall be shared equally.

#### LENGTH OF TIME TRANSPORTATION NEEDS TO BE PROVIDED AFTER A HOMELESS STUDENT HAS MOVED INTO PERMANENT HOUSING

Students can stay in their school of origin the entire time they are homeless, and until the end of any academic year in which they move into permanent housing. It is important to note that an episode of homelessness may span multiple school years. Students who are homeless are eligible to remain in the feeder pattern of their original school for the duration of homelessness. Access to transportation services continues until the end of the school year in which the child was determined to be homeless.

#### MODE OF TRANSPORTATION

There is no requirement that provided transportation be of any specific mode (school buses are not necessarily required). Transportation must be safe and appropriate for the individual student's situation and age. Modes may include school bus, transit passes, gas vouchers or reimbursement for parents or youths with cars, contracts with taxi companies (driver background checks are required), and contracts with Medicaid transportation brokers (driver background checks are required). In the case of students living in a shelter, the district may contract with the shelter to provide transportation. If law changes, the standards will follow the new law.

#### EVERY STUDENT SUCCEEDS ACT OVERVIEW

The following provides information on how the Title I A Foster Care provisions of the Every Student Succeeds Act relate to pupil transportation and describes transportation choices and requirements. These requirements apply to students under the care and supervision of state child welfare agencies and tribal child welfare agencies. Local Education Agencies (LEAs) working with tribal child welfare agencies must have meaningful consultation with tribal governments

#### REQUIREMENTS OF THE TITLE I A FOSTER CARE PROVISIONS

LEAs are required to provide students in foster care placements with transportation to and from their school of origin at the request of the social worker or guardian. Students in foster care are subject to the same time and distance limitations as their peers. However, exceptions should be considered for students living closer to the school than those normally offered transportation if there are safety or health concerns. Exceptions should also be considered for a student outside the distance or time limit dependent on the student's age/grade level and completion of graduation requirements.

#### TRANSPORTATION FOR STUDENTS IN FOSTER CARE IN RELATION TO DISTANCE

Every LEA should identify a foster care point of contact who will assist with the determination of whether the

transportation of the student is in the student's best interest. Cost of transportation cannot be used when determining a student's best interest. In accordance with Montana Code, travel time in excess of 60 miles or one hour, or other circumstances that result in extremely unusual travel demands, may all result in appropriate denial of transportation to the school of origin. The social worker or guardian may file a formal dispute with the LEA in the event of a disagreement with the transportation services offered or when the time and distance limitation impacts the school placement decision.

#### OTHER CONSIDERATIONS REGARDING FOSTER CARE TRANSPORTATION

Providing sensitivity training to bus drivers and arranging bus stops to keep student's living situations confidential is important in being able to assist these students through this difficult time in their lives with as little disruption as possible. Schools should be aware of group homes within the community that offer congregate care and position bus stop locations in such a way as to protect student privacy. Close ties and collaboration between the school district foster care point of contact, pupil transportation staff, social workers and guardians are strongly encouraged and will help make this process work smoothly for the student.

#### SCHOOL DISTRICT RESPONSIBILITIES FOR TRANSPORTATION COSTS WHEN A STUDENT IN FOSTER CARE REQUIRES TRANSPORTATION ACROSS DISTRICT BOUNDARIES

When a student in foster care requires transportation to the school of origin, and that school is outside the current school district, the two school districts involved should collaborate with the social worker to determine which district is going to assume responsibility for transportation and for how the cost is to be shared. If the transportation needs meet the reimbursement requirements for state and county reimbursement, the school of origin can bill the state and county for the costs allowed in statute and ARM. LEAs, in collaboration with child welfare agencies, should provide school of origin transportation to students in foster care that is age- and developmentally appropriate. ~~Currently, the US Department of Education has not issued final regulations or guidance related to the responsibility for the cost of transportation.~~

#### LENGTH OF TIME TRANSPORTATION IS TO BE PROVIDED TO A STUDENT IN FOSTER CARE

Students can stay in their school of origin the entire time they are in any type of foster care placement including group home, foster home, or foster care with a relative. It is important to note that the placement of a student in foster care may span multiple school years. Students who are in foster care are eligible to remain in the feeder pattern of their school of origin for the duration of their foster care placement. Access to transportation services continues as long as the student is in any type of foster care placement.

#### MODE OF TRANSPORTATION

There is no requirement that provided transportation be of any specific mode (school buses are not necessarily required). Transportation must be safe and appropriate for the individual student's situation and age. Modes may include school bus, transit passes, gas vouchers or reimbursement for guardians, contracts with taxi companies (driver background checks are required), and contracts with Medicaid transportation brokers (driver background checks are required). In the case of students living in a group home, the district may contract with the group home to provide transportation.

If law changes, the standards will follow the new law.

#### SEATING REQUIREMENTS

1. Montana schools must follow Highway Safety Guideline #17, "Pupil Transportation Safety," as issued by the National Highway Traffic Safety Administration NHTSA, states:
  - a. Standing while school buses and school-charter buses are in motion shall not be permitted. Routing and seating plans should be coordinated to eliminate passengers standing when a school bus or school-charter bus is in motion; and
  - b. Due to variations in sizes of children of different ages, states and school districts should exercise

judgment in deciding how many students are actually transported in a school bus or school- charter bus.

2. School buses provide the safest form of pupil transportation. An integral part of providing “safe” transportation in a school bus is that the passengers must be properly seated. From a safety perspective, a person who is either standing or improperly seated in a school bus is not afforded the benefits of the safety protection designed into the vehicle and is in increased jeopardy of injury in the event of a crash or extreme sudden driving maneuver.
  - a. Additionally, there must be sufficient space on the school bus seat for each passenger’s body to be completely within the seat compartment. In the event of a crash or sudden driving maneuver, students that are not properly seated within the seat compartment may not benefit from the passenger crash protection systems built into the school bus under federal and state regulations.
  - b. In practice, school buses transport students of various sizes, typically from preschool students to 12th graders. While a 39-inch seat may safely accommodate three primary school-aged children, it may not safely accommodate the same number of older children. Since the size of growing children varies, the number of pupils that can safely occupy a school bus seat also changes. Consequently, the “in-use” capacity of a school bus varies depending on the size of the pupils transported. The use of a child safety seat for an infant or toddler, or of special equipment needed for a child with disabilities may further impact the “in-use” capacity of a school bus.
3. It is important to consider the size of the passengers on each school bus route when determining the “in-use” capacity of a school bus. It is recognized that at certain times, for example, at the beginning of a school year, it may not be possible to know exactly how many students will arrive at school bus stops on a route. For that reason, there may be instances where overcrowding exists temporarily on some school buses. In such situations, efforts should be made to provide safe seating to all school bus passengers in a timely and efficient manner, so that during regular operations all passengers are safely seated.

## **SCHOOL BUS EVACUATIONS**

School bus evacuations must be conducted at least twice per school year and must include all students whether they ride to and from school or not.

The first evacuation must be held within the first two weeks of school.

The second evacuation must be within the first week of the second semester.

All students must practice the evacuation drills since they may ride an activity bus sometime during the school year.

All evacuation drills should be conducted in the same way each time so the students will know exactly what to expect. Students need to know what it looks like, what it sounds like and what it feels like so there are no surprises during a real emergency.

The driver should always be prepared to help the students.

## **EVACUATION PROCEEDURES**

Be Prepared and Plan Ahead. When possible, assign two responsible, older student assistants to each emergency exit. Teach them how to assist the other students off the bus. Assign another student assistant to lead the students to a “safe place” after evacuation. However, you must recognize that there may not be older, responsible students on the bus at the time of the emergency. Therefore, emergency evacuation procedures must be explained to all students. This includes ensuring that they know the location of and operation of the various emergency exits, and the importance of listening to and following all instructions given by you.

Some tips to determine a safe place:

1. A safe place for the students will be at least 100 feet off the road in the direction of oncoming traffic. This will keep them from being hit by debris if another vehicle collides with the bus.

2. Lead students upwind of the bus if fire is present.
3. Lead students at a 45-degree angle away from the train and in the direction of any oncoming train.
4. Lead students upwind of the bus at least 300 feet if there is a risk from spilled hazardous materials.
5. If the bus is in the direct path of a sighted tornado and evacuation is ordered, escort students to a nearby ditch or culvert if shelter in a building is not readily available, and direct them to lie face down, hands covering their head. They should be far enough away so the bus cannot topple on them.
6. Avoid areas that are subject to flash floods.

#### General Procedures.

1. Determine if evacuation is in the best interest of safety.
2. Determine the best type of evacuation:
  - a. Front, rear or side door evacuation, or some combination of doors.
  - b. Roof or window evacuation.
3. Secure the bus by:
  - a. Placing transmission in Park, or if there is no shift point, in Neutral.
  - b. Setting parking brakes.
  - c. Shutting off the engine.
  - d. Removing ignition key.
  - e. Activating hazard-warning lamps.
4. If time allows, notify dispatch office of evacuation location, conditions, and type of assistance needed.
5. Dangle radio microphone or telephone out of driver's window for later use, if operable.
6. If no radio, or radio is inoperable, use a cell phone, dispatch a passing motorist or area resident to call for help. As a last resort, dispatch two older, responsible students to go for help.
7. Order the evacuation.
8. Evacuate students from the bus.
9. Do not move a student who may have suffered a neck or spinal injury unless his or her life is in immediate danger.
10. Special procedures must be used to move neck spinal injury victims to prevent further injury.
11. Direct a student assistant to lead students to the nearest safe place.
12. Walk through the bus to ensure no students remain on the bus. Retrieve emergency equipment.
13. Join waiting students. Account for all students and check for their safety.
14. Protect the scene.
15. Set out emergency warning devices as necessary and appropriate.
16. Prepare information for emergency responders.
17. Provide first aid as necessary.

#### **TRANSPORTATION FOR SCHOOL RELATED ACTIVITY FUNCTIONS**

Each school system ~~or Head Start agency~~ providing activity bus operations should have comprehensive policies and guidelines which delegate responsibility for this function to the supervisor of student transportation. To provide safe and efficient activity transportation, lines of responsibility and authority need to be defined and personnel involved must understand their respective responsibilities.

In the interest of providing the safest means of transportation available, students should be transported to school ~~or Head Start~~-sponsored activities in school buses or allowable alternate vehicles that meet state and federal standards, unless circumstances require an alternate mode of transportation as defined in regulation.

These school ~~or Head Start~~-related activity trips may include field trips that are extensions of the instructional program, athletic trips, ~~vocational and trade~~ career and technical education training, volunteer activities and recreational outings, such as dances, picnics and overnight camping trips.

## **BUS USE FOR SCHOOL ACTIVITY TRIPS**

### Pre-service driver training

In addition to successfully completing all pre-service training provided by their employer, school activity bus drivers shall complete at least a state-required course of instruction.

### In-service driver training

All school activity bus drivers shall receive the state-required 15 hours of in-service training annually and shall be required to maintain current first aid and CPR certifications.

### Hours of service

Driver shall comply with the provisions of CFR 49, Part 395.5.

### Specially equipped bus

School activity buses may be designed or modified in accordance with Federal Standards or the Americans with Disabilities Act requirements to transport passengers seated in wheelchairs.

### Vehicle condition

It shall be unlawful for the driver to drive a school activity bus that is not in safe operating condition or is not equipped, as required by all provisions of law. The driver is responsible for pre-trip inspection, ensuring the vehicle's condition.

### Pre-trip inspection

Prior to operation, the driver shall inspect each school activity bus to ascertain that it is in safe condition, it is equipped, as required by all provisions of law, and all equipment is in good working order. The inspection shall include, but is not limited to, the following items:

All required emergency equipment, as well as, first aid and body fluid cleanup kit(s), fire extinguisher(s), reflectors;

1. All gauges, indicators and warning devices;
2. Horn(s);
3. Driver's seat and seat belts;
4. All doors, door emergency releases, overhead hatches and windows;
5. All seats, handrails and modesty panels;
6. Interior and exterior lighting systems;
7. All heating, cooling and ventilating systems;
8. All glass and mirrors, including adjustment of mirrors;
9. Windshield wipers and washers;
10. All tires, wheels, rims and lug nuts;
11. Wheelchair restraints, tie downs and loading devices (such as ramps and lifts);
12. Brake system
13. Air compressor governor cut-in and cut-out pressures;
14. Static pressure for air loss;
15. Applied brake pressure loss;
16. Low air pressure warning devices;

### Emergency stopping systems

1. Parking brake;
2. Antiskid device (if equipped);
3. Low vacuum warning device(s); and
4. Brake pedal for brake adjustment.

**Note:** Draining reservoirs in dual air systems is not required.)

### Daily report

At the completion of the driver's work or tour of duty, each driver shall submit a daily documented report to the employer indicating the condition of the vehicle and noting any defects found. Whether discovered by or reported to the driver, all vehicle defects and deficiencies likely to affect safe operation or cause mechanical breakdown of the school activity bus shall be listed, and a negative report shall indicate that no such conditions are present.

### Repairs

The driver shall not make any repairs of the bus or its equipment except necessary emergency repairs on the road.

## GENERAL REQUIREMENTS OF TRANSPORTATION FOR SCHOOL RELATED ACTIVITIES

These trips range from a few miles to those extending over several days and covering large distances. The following items need to be considered when developing criteria for activity trip transportation:

1. Policies and guidelines, including:
  - a. Purpose of trip (instructional, athletic, students'/spectators' recreation, etc.);
  - b. Funding source (district or individual school funds, individual charge, parent group, etc.); and
  - c. Administrative approval (the person(s) having authority to approve the trip and commit funds).
2. A priority guideline should be developed for trip scheduling, addressing situations when all requests cannot be accommodated.
  - a. Advance notification should allow adequate time for the approval process and for making driver and vehicle arrangements.
  - b. Methods of travel may include district- or agency-owned or contracted bus, commercial carrier or local transit equipment, air, boat, rail or combination of the above, private or school passenger automobile, when required by special or unique needs.
  - c. A trip request form should include all necessary information for trip arrangements, special equipment, payroll, reimbursement and other local needs.
  - d. Adult chaperones should be required on all activity trips. Responsibilities include passenger control, with the driver having final authority.
  - e. Discipline and emergency medical procedures should require a trip release for each student to be signed by parents and should include procedures concerning difficult or severe behavioral and medical problems and emergency policies and contacts.
3. Communication is essential. Drivers, students, chaperones and parents should be made aware of applicable rules and regulations. Parents should have destination information, mode of transportation, names of chaperones, meal stop information, expected departure and return times, appropriate dress and what the students should bring with them. A signed authorization for student participation from the parent or guardian is important. A detailed itinerary for all persons involved may be advisable. Identification of proper response to special medical problems in the event of an emergency en-route is necessary.
4. Luggage accommodations, if applicable, must be included. A procedure for transporting luggage or equipment prohibited in the passenger compartment by state law and/or local regulations is necessary. Loose luggage or equipment which could cause injury or block passageways should never be transported in the passenger compartment. In no event shall emergency exits be blocked by loose luggage, band equipment, backpacks, ski equipment, etc.
5. Policies should detail whether or not out-of-state trips are permitted and, if so, any applicable restrictions. Regulations for states to be visited should be reviewed prior to the trip.
6. All school buses shall be inspected by the Montana Highway Patrol semi-annually (TR-13 Form). The first semiannual inspection must be passed no more than 30 days prior to the beginning of the first semester. The second semiannual inspection must be passed no later than January 31. Only school buses that pass inspection may be used to transport students and only school buses that pass



inspection will receive state and county transportation reimbursement. A school bus that fails to pass inspection will not be eligible for state and county reimbursement until the bus is re-inspected and approved by the inspecting officer. The school district is responsible for contacting the Montana Highway Patrol for bus inspections. Nothing in this rule precludes the Montana Highway Patrol from inspecting school buses at other times as the highway patrol sees fit. Buses that are placed in operation after the school semester has begun must be inspected and approved by the Montana Highway Patrol before the vehicle is operated on the established route.

NOTE: A completed copy of the Bus Inspections (TR-13 Form) must be kept on the school bus for the current fiscal year, a copy kept with the school district, and a copy will be sent to the Montana Highway Patrol Office.

7. Road and weather checks should be made by the designated person. School transportation personnel from other school districts, state patrols, highway divisions and auto clubs are generally cooperative in supplying road information. If warranted, the weather bureau should also be contacted. A planned route and any contingent route for trips should be determined prior to initiation of the trip.
8. Contingency plans require policies and procedures that detail persons who have authority to make decisions if the unexpected happens during a trip. Impassable roads, crashes or mechanical breakdowns are examples. Drivers and chaperones should have access to that authority's phone number. It is also advisable to obtain phone numbers of transportation personnel in various communities and school districts where activity vehicles regularly travel.
  - a. Provisions should include plans for staying overnight if conditions do not permit a safe trip home. It is advisable to develop a mutual aid directory for contact within athletic league boundaries which could aid in the event of mechanical emergencies. Drivers should be trained in procedures and regulations relating to trip crashes.
9. Driving hours shall be regulated, and documented. All Sschool districts agencies shall not be exempt from regulations based on the Federal Motor Carrier Safety Regulation 49 CFR 395.5 (15 hours on duty of which no more than 10 hours are driving time; 8 hours continuous off-duty prior to a long trip; no more than 60 hours driving in a week).
10. Driver selection and assignment criteria are necessary to avoid conflict and confusion. The criteria should include a driver's knowledge, skill, experience and familiarity with activity trip vehicles. The area to be traveled should also be a consideration. Drivers should be notified at least three days in advance of the trip date. Drivers who drive only activity trips should be tested periodically for driving ability and vehicle familiarity. They should hold the same license and certification as regular school bus drivers.
11. Passenger manifests (a list of all passengers being transported) shall be kept on board the bus with driver access when necessary and left with proper authorities at the school or institution. In the event of an emergency, the passenger manifest and/or seating chart, shall be made available upon request by the investigating officer/emergency personnel.
12. Evacuation instruction, including an emergency evacuation drill, or at least verbal instructions, should be given by the driver before each trip. (See INSTRUCTIONS FOR CONDUCTING EMERGENCY EXIT DRILLS.)
13. Commercial Driver's License (CDL) with an School Bus "S" and Passenger "P" endorsement is required when a person who drives a school bus, or who transports pre-primary early childhood education, primary, or secondary school students for school-related activity trips, field trips, and operating on an approved route, in a commercial motor vehicle. The "S" endorsement shall be required for any school bus, including 16 passengers and less, and 16 passengers and more.

\*\*\*There shall be no exceptions to this rule. \*\*\*\*\*
14. Vehicle and equipment:
  - b.a. A tool kit containing items such as a flashlight, pliers, screwdrivers, de-icer, extra chain tighteners, etc., and additional equipment for an extended trip, as may be recommended by transportation personal personnel at the destination;
  - e.b. Fuel, bridge tolls, parking fees and personal needs;
  - d.c. Emergency telephone numbers and other information; and

~~e.d.~~ Maps or Global Positioning Systems (GPS), as appropriate.

~~f.e.~~ Inspection requirements should be the same as for regular route buses, and a detailed check should be made prior to activity trips. A completed copy of the inspection shall remain on the bus for the current Fiscal Year.

~~g.f.~~ School buses shall be prohibited from towing another bus, trailer or any vehicle when students are on board the bus.

## TRAINING

1. Specialized training should be provided for activity trip drivers. Training should include, but not be limited to, the following:
  - a. State laws and applicable policies and rules;
  - b. Familiarity with the activity trip vehicle and its components;
  - c. Drivers are prohibited by law to talk or text on a cellular or portable device (including hands free Bluetooth devices) while operating a commercial vehicle.
  - d. Familiarity with local and state trip requirements;
  - e. Discipline procedures on trips;
  - f. Driving under adverse conditions (night driving, slippery roads or unfamiliar mountainous driving);
  - g. Maps, destination locations and parking areas;
  - h. Parking location, if other than the student destination; and
  - i. Provisions for bus security at the destination.
2. Specialized training should be provided for all trip chaperones and include at least the following:
  - a. all regulation related to student rider behavior;
  - b. the specific roles and responsibilities of a chaperone both on and off the vehicle as defined by applicable regulations and policies;
  - c. the communication expectations between chaperone and driver; and
  - d. emergency procedures, including evacuations.

## APPENDIX A - GLOSSARY

### INTRODUCTION

This glossary was developed with three purposes in mind:

1. To provide easy access to the definition of terms used or referenced within the document;
2. To consolidate, in one resource, the acronyms, abbreviations and standard terms commonly used in the industry; ~~and~~
3. To promote consistency throughout the industry by providing standard definitions or preferred usages for terms that may be used differently in different parts of the country; ~~and-~~
4. The glossary is not intended to be definitive. There are and will be terms that are excluded and definitions that differ from regional usages. It is an attempt to reflect the language of pupil transportation which, like all language, is ever-changing.

### GLOSSARY OF TERMS AND DEFINITIONS

~~**ARB:** The abbreviation for the (California) Air Resources Board, the state agency in California which sets the state's emission standards.~~

**Access panel:** A body panel which must be moved or removed to provide access to one or more serviceable components,

**Accessibility:** Ability of vehicles and facilities to accommodate people with disabilities.

**Activity bus:** A bus owned, leased, or contracted by a school district and regularly used to transport students on field trips, athletic trips or other curricular or extracurricular activities, but not used for to-and- from school transportation; must meet all FMVSSs ~~(Federal Motor Vehicle Safety Standards)~~ for school buses.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Activity seat:</b> A seat designed for passenger comfort with contoured seats and backs with the result that passengers' positions are distinctly separate; characterized by fixed seat backs; may have arm rests and head rests; can be manufactured to meet FMVSS <del>(Federal Motor Vehicle Safety Standards)</del> No. 222.                                                                                                                                                                                                                                                      |
| <b>Activity trip:</b> The transportation of students to any event sanctioned for pupil attendance or authorized by an officer, employee or agent of a public or private school, other than to-and-from school transportation. (See also field trip.)                                                                                                                                                                                                                                                                                                                                     |
| <b>ADA:</b> The Americans with Disabilities Act, PLIOI-336, 42 USC 12101,etseq.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Adaptive device:</b> Any item or piece of equipment used to increase, maintain or improve functional capabilities of children with disabilities. The device is also known as an assistive technology device.                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Aide:</b> (See attendant.)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Alcohol:</b> The intoxicating agent in beverage alcohol, ethyl alcohol, or other low molecular weight alcohols including methyl and isopropyl alcohol.                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Alternately flashing signal lamps:</b> A system of red or red and amber signal lamps mounted horizontally both front and rear, intended to identify a vehicle as a school bus and to inform other users of the highway that the bus is about to stop or is stopped to load or unload children; also known as stop signal lamps, SOS lights or school bus traffic warning lights.                                                                                                                                                                                                      |
| <b>Alternative-fuel vehicle (AFV):</b> A vehicle designed to operate on an energy source other than <u>petroleum-based</u> gasoline or <u>regular grades of diesel fuel</u> . Such fuels include, but are not limited to, CNG <del>(compressed natural gas)</del> , LNG (liquefied natural gas), LPG <del>(liquefied petroleum gas)</del> , advanced diesel fuel formulations and electricity.<br><u>Bio-fuel: A vehicle designed to operate on two different fuels, but not simultaneously.</u><br><u>Dual fuel: A vehicle designed to operate on a mixture of two different fuels.</u> |
| <b>AMD:</b> Ambulance Manufacturer Design.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Anchorage point:</b> The point of attachment of a securement system or occupant restraint to the vehicle structure.                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <del><b>ANPR:</b> Advanced Notice of Proposed Rulemaking. Notice published in the Federal Register by a federal agency, such as NHTSA (National Highway Traffic Safety Administration), requesting information and inviting comment on a proposed change of regulation.</del>                                                                                                                                                                                                                                                                                                            |
| <del><b>ANSI:</b> American National Standards Institute, the organization which administers and coordinates the development of voluntary industry standards.</del>                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Antilock brakes:</b> Brake systems with sensors that automatically control the degree of wheel slip during braking and that relieve brake pressure on wheels that are about to lock up.                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Aspect ratio:</b> Percentage used to express the ratio of a tire's height to its width; also known as tire profile.                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Assessment team:</b> A group of persons, including the parent or guardian of a student with disabilities, who develop a profile of the student in terms of his or her mental and physical functioning to determine the student's eligibility for special education. (See also MDC.)                                                                                                                                                                                                                                                                                                   |
| <b>Assistive device:</b> (See adaptive device.)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Attendant:</b> A person assigned to assist one or more individual student(s) with disabilities on a school bus or school vehicle; also known as aide or paraprofessional. (See also monitor.)                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>BAC:</b> Blood or breath alcohol concentration; the measure used to determine alcohol impairment.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Ball seat nut mounting:</b> A wheel mounting system wherein the wheel centering is provided by the wheel mounting studs and the ball seat nuts which, when properly tightened, assure the centering alignment of the wheel.                                                                                                                                                                                                                                                                                                                                                           |
| <del><b>BAT:</b> Breath Alcohol Technician, an individual who instructs and assists persons in the alcohol testing process and operates an EBT (evidential breath testing).</del>                                                                                                                                                                                                                                                                                                                                                                                                        |

|                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Behavior management:</b> Methods of influencing student conduct on the school bus.                                                                                                                                                                                                                                                                                   |
| <b>Bench seat:</b> A seat designed to accommodate more than one passenger with no apparent partitioning between positions, which is characterized by fixed legs and a fixed back (e.g., the standard school bus seat which meets FMVSS No. 222.)                                                                                                                        |
| <del><b>Bias ply:</b> A pneumatic tire in which the ply cords extending to the beads are laid at alternate angles substantially less than 90 degrees to the centerline of the tire.</del>                                                                                                                                                                               |
| <del><b>Bi-fuel:</b> Used to describe a bus capable of running on either of two fuels, although not simultaneously. Engines which can be switched to run on either CNG (compressed natural gas) or gasoline are examples.</del>                                                                                                                                         |
| <b>Biodiesel:</b> Vehicle fuel made from plant matter and commonly mixed with diesel fuel in engines.                                                                                                                                                                                                                                                                   |
| <del><b>Bio-fuel:</b> A vehicle designed to operate on two different fuels, but not simultaneously.</del>                                                                                                                                                                                                                                                               |
| <b>Blood Borne Pathogens:</b> Common name for standards adopted by OSHA in 29 CFR 1910, to protect workers against the health hazards of exposure to blood and other potentially infectious body fluids or materials; also refers to the pathogenic microorganisms present in human blood.                                                                              |
| <b>Boarding:</b> The process of loading passengers into a school bus.                                                                                                                                                                                                                                                                                                   |
| <b>Body fluids cleanup kit:</b> Package of materials including, but not limited to, latex gloves, disposal bag and absorbent material, used to clean up spills of potentially infected bodily fluids, under OSHA's Blood borne Pathogens regulations and Universal Precautions practices; also known as hygiene kit.                                                    |
| <b>Brake fade:</b> A condition that occurs as brakes become less effective.                                                                                                                                                                                                                                                                                             |
| <b>Brake:</b> A device or mechanism used to retard and stop the speed of a moving vehicle or to prevent the movement of a stopped vehicle.                                                                                                                                                                                                                              |
| <b>Braking distance:</b> The distance a vehicle travels between the time the brakes are applied and the time forward motion ceases.                                                                                                                                                                                                                                     |
| <del><b>BTU:</b> A unit of work or energy known as a British Thermal Unit. One BTU is the energy required to increase the temperature of one pound of water by one degree Fahrenheit.</del>                                                                                                                                                                             |
| <b>Bus:</b> A motor vehicle with motive power, except a trailer, designed for carrying more than ten (10) persons.                                                                                                                                                                                                                                                      |
| <b>Business district:</b> The territory contiguous to and including a highway when within any 600 feet along such highway there are buildings in use for business or industrial purposes, including but not limited to hotels, banks, or office buildings which occupy at least 300 feet of frontage on one side or 300 feet collectively on both sides of the highway. |
| <b>Bus body:</b> The portion of a bus that encloses the occupant space exclusive of the bumpers, the chassis frame, and any structure forward of the forward-most point of the windshield mounting.                                                                                                                                                                     |
| <b>Bus pass:</b> Authorization to ride a school bus other than the student's assigned bus; or prepayment for transit bus rides.                                                                                                                                                                                                                                         |
| <b>Bus yard:</b> An area for storage and maintenance of buses.                                                                                                                                                                                                                                                                                                          |
| <del><b>CAA:</b> Clean Air Act; also known as CAAA, the Clean Air Act Amendments of 1990.</del>                                                                                                                                                                                                                                                                         |
| <b>Capacity:</b> (See seating capacity.)                                                                                                                                                                                                                                                                                                                                |
| <b>Capital costs:</b> Long-term costs associated with the purchase of vehicles, buildings and property.                                                                                                                                                                                                                                                                 |
| <b>Captive:</b> Refers to a non-removable attachment, part or fitting on a securement system.                                                                                                                                                                                                                                                                           |
| <b>Carbon monoxide:</b> A product of incomplete combustion; this gas is colorless, odorless and very poisonous. It does not contribute to smog.                                                                                                                                                                                                                         |

|                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Carrier:</b> Any public-school district, any public or private educational institution providing preschool, elementary or secondary education, or any person, firm or corporation under contract to such a district or institution, engaged in transporting students.                                                                            |
| <b>Casualty insurance:</b> (See liability insurance.)                                                                                                                                                                                                                                                                                               |
| <b>Catalytic converter:</b> An exhaust after-treatment device containing a catalytic material that is used to burn off or reduce unburned fuel or gases and thus reduce emissions, particularly oxides of nitrogen (NOx) and hydrocarbons. Diesel converters run at cooler temperatures than do gasoline converters and require different catalysts |
| <b>CDIP:</b> Commercial Drivers Instructional Permit. The learner's permit that a CDL applicant receives when he/she passes the knowledge tests; it allows the applicant to drive a CMV when accompanied by a driver with a CDL.                                                                                                                    |
| <b>CDL:</b> Commercial Driver's License.                                                                                                                                                                                                                                                                                                            |
| <b>Cetane number:</b> A measure of self-ignition properties of a fuel after injection in a diesel engine. It relates to the knock properties of fuel. The higher the number, the more easily the fuel will ignite under compression; therefore, higher cetane fuels are usually preferred in diesel engines.                                        |
| <b>CFR:</b> Code of Federal Regulations.                                                                                                                                                                                                                                                                                                            |
| <b>Chain of custody:</b> The chronological handling, documentation, or paper trail showing receipt, custody, control, or transfer of students or items (such as medication).                                                                                                                                                                        |
| <b>Charter bus:</b> A bus that is operated under a short-term contract with a school district or other sponsor who has acquired the exclusive use of the vehicle at a fixed charge to transport students to a school-related event.                                                                                                                 |
| <b>Chassis starting interlock circuit:</b> A device which prevents the engine of a bus from starting if any of the emergency exits are locked.                                                                                                                                                                                                      |
| <b>Chassis:</b> Vehicle frame with all operating parts, including engine frame, transmission, wheels and brakes.                                                                                                                                                                                                                                    |
| <b>CMV:</b> <del>Commercial</del> <u>Commercial</u> motor vehicle                                                                                                                                                                                                                                                                                   |
| <b>CNG:</b> Compressed natural gas.                                                                                                                                                                                                                                                                                                                 |
| <b>Combustible gas sensor:</b> Detector capable of sensing the presence of natural gas.                                                                                                                                                                                                                                                             |
| <b>Common carrier:</b> A public bus, train or airplane that travels on a prescribed route and schedule, and accepts passengers indiscriminately.                                                                                                                                                                                                    |
| <b>Communicable disease:</b> Any illness that can be transmitted from one person to another, including most common childhood diseases, the common cold and serious illnesses such as hepatitis and AIDS.                                                                                                                                            |
| <b>Community transportation:</b> Services that address all transit needs of a community, including general and special populations, such as the elderly and disabled.                                                                                                                                                                               |
| <b>Completed vehicle:</b> A vehicle that requires no further manufacturing operation to perform its intended function other than the addition of readily attachable components, such as mirrors or tire and rim assemblies, or minor finishing operations such as painting.                                                                         |
| <b>Conduct report:</b> A form authorized by school officials for use by drivers to report instances of unacceptable behavior by school bus passengers; also known as discipline report.                                                                                                                                                             |
| <b>Conspicuity:</b> The ability of an object to be noticed and recognized without any confusion or ambiguity (SAE <del>(Society of Automotive Engineers)</del> J 1967).                                                                                                                                                                             |
| <b>Continuum of services:</b> The range of possible options, from least restrictive to most restrictive,                                                                                                                                                                                                                                            |
| available to students with disabilities for transportation services.                                                                                                                                                                                                                                                                                |

|                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <del><b>Crash test:</b> (See impact test.)</del>                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Crash:</b> (1) A motor vehicle crash involving a school bus with or without a pupil on board, resulting in any personal injury or death or any disabling damage to one or more motor vehicles requiring the vehicle(s) to be transported away from the scene by a tow truck or other vehicle; or (2) A collision involving any vehicle or any pupil or school bus at any time during the loading or unloading process. |
| <b>Criminal background check:</b> The investigation of a person's criminal history through submission of fingerprints to state and/or federal authorities; also known as background check.                                                                                                                                                                                                                                |
| <b>Crossing arm:</b> A device attached to the front bumper of a school bus, activated during loading and unloading and designed to force the students to walk far enough away from the front of the bus to be seen by the driver; also known as crossing control arm.                                                                                                                                                     |
| <del><b>Cross view:</b> Convex mirrors mounted on the front of the school bus and designed for student detection during loading and unloading, including elliptical, quadri-spherical, banana, or standard-convex; also known as System-B mirrors.</del>                                                                                                                                                                  |
| <del><b>Cryogenic:</b> Relates to storage and use at very low temperatures. LNG (liquefied natural gas) requires cryogenic systems.</del>                                                                                                                                                                                                                                                                                 |
| <b>CSRS:</b> Child Safety Restraint System; a device meeting the requirements of FMVSS No. 213, designed for use in a motor vehicle to restrain, seat or position a child who weighs less than 50 pounds; also known as child safety seat and car seat.                                                                                                                                                                   |
| <b>Curb cut:</b> Area where the street curb has been cut and sloped to allow the sidewalk to lead smoothly to the roadway.                                                                                                                                                                                                                                                                                                |
| <b>Curb weight:</b> The weight of a motor vehicle with standard equipment, maximum capacity of engine fuel, oil, and coolant and, if applicable, air conditioning and additional weight of optional engine, but without passengers.                                                                                                                                                                                       |
| <del><b>CW:</b> Commercial motor vehicle. A motor vehicle defined in 49 CFR 390.5.</del>                                                                                                                                                                                                                                                                                                                                  |
| <del><b>CWSA:</b> Commercial Motor Vehicle Safety Act of 1986; among other things, authorization for CDL.</del>                                                                                                                                                                                                                                                                                                           |
| <b>Danger zone:</b> A ten-foot area immediately surrounding the stopped school bus.                                                                                                                                                                                                                                                                                                                                       |
| <del><b>Davenport seat:</b> A bench seat that extends from side wall to side wall at the rearmost seating position in the bus; not permitted in school buses.</del>                                                                                                                                                                                                                                                       |
| <b>Deadhead:</b> Movement of a bus without passengers (e.g., from school to bus yard).                                                                                                                                                                                                                                                                                                                                    |
| <del><b>Deadtime:</b> The period between arriving at an activity trip destination and leaving the destination for the trip home; also known as waiting time and stand-by time.</del>                                                                                                                                                                                                                                      |
| <b>Dealer:</b> Any person who is engaged in the sale and distribution of new motor vehicles or motor vehicle equipment primarily to purchasers who, in good faith, purchase any such vehicle or equipment for purposes other than resale.                                                                                                                                                                                 |
| <b>Diesel Exhaust Fluid (DEF):</b> Diesel Exhaust Fluid is a non-hazardous solution, which is 32.5% urea and 67.5% de-ionized water. DEF is sprayed into the exhaust stream of diesel vehicles to break down dangerous NOx emissions into harmless nitrogen and water.                                                                                                                                                    |
| <del><b>Designed seating capacity:</b> The theoretical passenger capacity that a vehicle would have if it were constructed with the maximum number of seating positions according to standard seating plans; also known as manufacturer seating capacity.</del>                                                                                                                                                           |
| <del><b>Disc wheel:</b> A permanent combination of a rim and wheel disc.</del>                                                                                                                                                                                                                                                                                                                                            |
| <b>Disc:</b> The part of the wheel which is the supporting member between the hub and the rim.                                                                                                                                                                                                                                                                                                                            |
| <b>Discipline:</b> A monitor whose primary responsibility is to control behavior of students on the bus.                                                                                                                                                                                                                                                                                                                  |



|                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Dispatch:</b> To relay service instructions to drivers.                                                                                                                                                                                                                                                                                                                                         |
| <b>Distributor:</b> Any person primarily engaged in the sale and distribution of motor vehicles or motor vehicle equipment for resale.                                                                                                                                                                                                                                                             |
| <del><b>DNR:</b> Do Not Resuscitate; an order from a parent, legal guardian or court that prohibits the use of emergency measures to prolong the life of an individual.</del>                                                                                                                                                                                                                      |
| <del><b>DOT bus:</b> A school bus that meets the FMCSR standards for interstate transportation set forth in 49 CFR 390.</del>                                                                                                                                                                                                                                                                      |
| <del><b>DOT driver:</b> A driver who meets the FMCSR standards, set forth in 49 CFR 391.</del>                                                                                                                                                                                                                                                                                                     |
| <b>DOT:</b> United States Department of Transportation.                                                                                                                                                                                                                                                                                                                                            |
| <del><b>Double run:</b> One bus making two trips over the same route each morning and afternoon (e.g. first picking up high school students and then returning for elementary students.)</del>                                                                                                                                                                                                     |
| <del><b>Downtime:</b> The period when a vehicle is inoperative (e.g. due to mechanical failure.)</del>                                                                                                                                                                                                                                                                                             |
| <b>Driver applicant:</b> A person who applies for a position as a school bus driver.                                                                                                                                                                                                                                                                                                               |
| <b>Driver qualifications:</b> Restrictions of state and federal law which determine a person's eligibility to become a school bus driver (e.g., age limits, physical condition, criminal record, driving history, etc.)                                                                                                                                                                            |
| <b>Driver training:</b> Instructional program designed to impart knowledge and improve the skills necessary for school bus drivers, including but not limited to knowledge of the vehicle, safe driving practices, emergency procedures and passenger control.                                                                                                                                     |
| <del><b>Driving:</b> Flat and convex mirrors mounted on each side of the bus designed for viewing the road along the sides to the rear while driving; also known as rearview, double nickel, west coast, or Swent A mirrors.</del>                                                                                                                                                                 |
| <del><b>Driving:</b> operating a commercial motor vehicle, including while temporarily stationary because of traffic, a traffic control device, or other momentary delays.</del>                                                                                                                                                                                                                   |
| <b>DRL:</b> Daytime running lamps; Head lamps that operate automatically at a reduced voltage during the day to increase the vehicle's visibility; also known as daytime running lamps.                                                                                                                                                                                                            |
| <b>Drug:</b> Any substance other than alcohol considered to be a controlled substance listed on schedules I through V in 21 CFR (Code of Federal Regulations)1308.                                                                                                                                                                                                                                 |
| <del><b>Dry run:</b> A trip on a route without student passengers for driver training or familiarization of the route.</del>                                                                                                                                                                                                                                                                       |
| <b>Dual brake system:</b> (See split brake system.)                                                                                                                                                                                                                                                                                                                                                |
| <del><b>Dual fuel:</b> A vehicle designed to operate on a mixture of two different fuels.</del>                                                                                                                                                                                                                                                                                                    |
| <b>Dual-fuel engine:</b> Also "flex fuel," used to describe a gasoline-methanol dual-fuel engine using mixtures of gasoline and methanol, such as M85, which is 15 percent gasoline and 85 percent methanol. Dual-fuel engine can also refer to engines operating on any other mixture of fuels simultaneously, such as engines which run on a mixture of CNG (compressed natural gas) and diesel. |
| <del><b>DVIR:</b> Driver vehicle inspection report. Federal, state or local approved form for reporting results of pre-trip and post-trip inspections; also known as daily vehicle inspection report and pre-trip inspection form.</del>                                                                                                                                                           |
| <b>Dynamic testing:</b> The process of subjecting vehicle, mobility aid, or mobility aid/securement system components to a simulated crash condition.                                                                                                                                                                                                                                              |
| <del><b>EAP:</b> Employee Assistance Program; a program of education and counseling required by 49 CFR 391 as part of a carrier's drug and alcohol testing program; may also include optional rehabilitation services.</del>                                                                                                                                                                       |
| <del><b>Early bus:</b> A bus scheduled to run prior to the regular morning run (e.g., to take children to daycare programs located in schools.)</del>                                                                                                                                                                                                                                              |

|                                                                                                                                                                                                                                                                                                                                 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <del><b>Early intervention service:</b> Education and related services provided to infants and toddlers from birth through two years of age.</del>                                                                                                                                                                              |
| <u><b>Earphones:</b> include headphones, ear buds, or other bluetooth devices.</u>                                                                                                                                                                                                                                              |
| <del><b>EBT:</b> Evidential Breath Testing device; a device approved by NHTSA for testing drivers for alcohol use.</del>                                                                                                                                                                                                        |
| <b>EDR:</b> Event Data Recorder; a device which records vehicle functions (e.g., speed change during a crash.)                                                                                                                                                                                                                  |
| <b>Effective date:</b> The date at which a regulation or standard takes effect, on or after which compliance is legally required.                                                                                                                                                                                               |
| <b>EHA:</b> The Education for all Handicapped Children Act, passed in 1975 as P.L.94-142. (See IDEA).                                                                                                                                                                                                                           |
| <b>Electronic voice communication system:</b> A means by which the driver of a vehicle can communicate with a dispatcher or other person at a remote location (e.g., two-way radio, cellular phone.)                                                                                                                            |
| <b>Emergency brake:</b> A mechanism designed to stop a motor vehicle after a failure of the service brake system.                                                                                                                                                                                                               |
| <del><b>Emergency response plan:</b> A detailed approach to identifying and responding to potential accidents involving hazardous substances; required for every community by the Emergency Planning and Right-to-Know Act of 1986.</del>                                                                                       |
| <b>Emergency roof exit:</b> An opening in the roof of the bus meeting the requirements of FMVSS No. 217 which provides emergency egress and sometimes ventilation; also known as roof hatch.                                                                                                                                    |
| <del><b>EPA:</b> The United States Environmental Protection Agency.</del>                                                                                                                                                                                                                                                       |
| <del><b>Ergonomics:</b> The study of the design of equipment to reduce human fatigue and discomfort.</del>                                                                                                                                                                                                                      |
| <b>Ethanol:</b> Grain alcohol, distilled from fermented organic matter and used as a vehicle fuel.                                                                                                                                                                                                                              |
| <b>Evacuation drill:</b> Performance of a mock school bus evacuation in order to teach students proper emergency procedures and to provide practice in the use of emergency exits; also known as bus safety drills.                                                                                                             |
| <b>Extended Stop Arm:</b> a device that partially obstructs the roadway is capable of extending a distance of at least 54 inches from the school bus at a height of not less than 36 inches, with an additional illuminated stop sign.                                                                                          |
| <del><b>Extended year service:</b> Transportation provided for students after the end of the traditional school year.</del>                                                                                                                                                                                                     |
| <b>Extra board driver:</b> (See substitute driver.)                                                                                                                                                                                                                                                                             |
| <del><b>FAPE:</b> Free Appropriate Public Education; guaranteed by the EHA for all handicapped children; it includes special education and related services, including transportation.</del>                                                                                                                                    |
| <b>FBI background check:</b> The national criminal record check.                                                                                                                                                                                                                                                                |
| <del><b>FERPA:</b> The Family Educational Rights and Privacy Act of 1974, 20 USC 1232, which requires confidentiality of student records in public schools, but allows access to necessary information regarding student disabilities and/or health needs to those who have a need to know, including school bus drivers.</del> |
| <b>FHWA:</b> Federal Highway Administration, an agency of the U.S. Department of Transportation.                                                                                                                                                                                                                                |
| <b>Field trip:</b> The transportation of students to an event or destination which is an extension of classroom activity (i.e., a part of the curriculum). A field trip is one type of activity trip.                                                                                                                           |
| <del><b>Final Rule:</b> Notice published in the Federal Register by a federal agency announcing a new or changed regulation.</del>                                                                                                                                                                                              |
| <del><b>Final stage manufacturer:</b> A person who performs such manufacturing operations on an incomplete vehicle that it becomes a completed vehicle.</del>                                                                                                                                                                   |

|                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>First aid:</b> Emergency treatment given to an ill or injured person before regular medical help is available.                                                                                                                                                                                                                                                                                                |
| <del><b>Fixed route:</b> Transportation service that runs on regular prescheduled routes, usually with bus schedules and designated bus stops.</del>                                                                                                                                                                                                                                                             |
| <b>Flip seat:</b> A school bus bench seat designed so that the cushion flips up when the seat is not occupied, similar to a theater seat; used to provide aisle clearance when a passenger seat is located adjacent to a side emergency door, as required by FVMSS No. 217.                                                                                                                                      |
| <del><b>FMCSA:</b> Federal Motor Carrier Safety Administration; an agency of the U.S. Department of Transportation; formerly the Office of Motor Carrier Highway Safety within the Federal Highway Administration.</del>                                                                                                                                                                                         |
| <del><b>FMCSR:</b> Federal Motor Carrier Safety Regulations, 49 CFR 383, 390-397, and 399; motor vehicle safety and construction standards under FMCSA that apply to commercial motor vehicles and drivers transporting passengers in interstate commerce.</del>                                                                                                                                                 |
| <del><b>FMLA:</b> Family and Medical Leave Act; requires employers to grant time off to employees for medical reasons or to care for family members.</del>                                                                                                                                                                                                                                                       |
| <b>FMVSS:</b> Federal Motor Vehicle Safety Standards, 49 CFR 57 1; construction standards developed and enforced by NHTSA that apply to all new motor vehicles and items of motor vehicle safety equipment.                                                                                                                                                                                                      |
| <del><b>Formaldehyde:</b> A chemical compound that is a by-product of combustion from engines. Concentrations may be particularly high in emissions from engines fueled by methanol.</del>                                                                                                                                                                                                                       |
| <del><b>Forward control bus:</b> A school bus in which more than half of the engine length is rearward of the foremost point of the windshield base and the steering wheel hub is in the forward quarter of the vehicle length; also known as transit style.</del>                                                                                                                                               |
| <b>Forward-facing:</b> Installation of the securement system in such a way that the mobile seating device and its occupant face the front of the vehicle when secured.                                                                                                                                                                                                                                           |
| <del><b>Four-point tie down:</b> A securement system in which four strap assemblies attach to the wheelchair frame at four separate points and anchor to the vehicle floor at four separate points.</del>                                                                                                                                                                                                        |
| <del><b>FSS:</b> Fire Suppressant System; a fire extinguisher system installed in the engine compartment of a vehicle and activated automatically in response to a fire sensor or manually in response to an alarm.</del>                                                                                                                                                                                        |
| <b>FTA:</b> Federal Transit Administration, part of U.S. Department of Transportation; formerly Urban Mass Transit Administration (UMTA).                                                                                                                                                                                                                                                                        |
| <b>Fuel injection:</b> System that uses no carburetor but sprays fuel directly into cylinders or into the intake manifold.                                                                                                                                                                                                                                                                                       |
| <del><b>Fumigate:</b> Literally means “to form a gas or disperse one gas in another.” The term is used to describe the injecting of gas, usually CNG, into the intake air of the engine.</del>                                                                                                                                                                                                                   |
| <del><b>G/bhp-hr:</b> The amount of a pollutant generated in one hour measured in grams per brake horsepower.</del>                                                                                                                                                                                                                                                                                              |
| <b>GAWR:</b> Gross <u>A</u> xle <u>W</u> eight <u>R</u> ating, the value specified by the manufacturer as the load-carrying capacity of a single axle system, as measured at the tire-ground interfaces.                                                                                                                                                                                                         |
| <b>Glazing:</b> The glass or glass-like portion of a window.                                                                                                                                                                                                                                                                                                                                                     |
| <b>Greenhouse gases:</b> some of these gases are formed by vehicle emissions causing a rise in temperature of the earth’s atmosphere.                                                                                                                                                                                                                                                                            |
| <b>Guideline 17:</b> A highway safety program guide for pupil transportation safety issued by NHTSA in 23 CFR 1204.; formerly Standard 17.                                                                                                                                                                                                                                                                       |
| <b>GVWR:</b> Gross vehicle weight rating; the value specified by the vehicle manufacturer as the load carrying capacity of a single vehicle as measured at the tire-ground interfaces. For school buses, NHTSA has defined in Title 49 CFR, Section 567.4(g)(3), the minimum occupant weight allowance as 120 pounds per passenger times the number of the vehicle’s designated seating positions and 150 pounds |

|                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| for the driver. Gross Vehicle Weight Rating shall not be less than the sum of the unloaded vehicle weight, plus the rated cargo load.                                                                                                                                                   |
| <b>Handrail inspection tool:</b> A device formed by tying a half-inch hex nut to a 36" cord, used to inspect school bus handrails and other areas for possible snagging hazards.                                                                                                        |
| <b>Hazard lamps:</b> Lamps that flash simultaneously to the front and rear on the right and left sides of a vehicle, used to indicate caution; also known as four- way flashers.                                                                                                        |
| <b>Head protection zone:</b> The empty space above and in front of each school bus passenger seat which is not occupied by side wall, window or door structure, the dimensions of which are detailed in FMVSS No. 222.                                                                  |
| <del><b>Head Start:</b> A program initiated in 1965 to provide comprehensive child development services to pre-school children of predominantly low income families.</del>                                                                                                              |
| <b>Headsign:</b> A sign above the windshield of the bus which can be changed from School Bus to other wording, such as Charter.                                                                                                                                                         |
| <del><b>Health care plan:</b> A plan of action used to outline the care for a medically fragile individual.</del>                                                                                                                                                                       |
| <b>Highway:</b> Any public highway, road, street, alley, parkway or other place open to public motor vehicle travel.                                                                                                                                                                    |
| <b>Horsepower:</b> The measurement of an engine's ability to do work. One horsepower is the ability to lift 33,000 lbs. one foot in one minute.                                                                                                                                         |
| <b>Hours of service:</b> The consecutive or cumulative period that a commercial driver may be on duty.                                                                                                                                                                                  |
| <del><b>HOV:</b> High Occupancy Vehicle, a vehicle that can carry two or more passengers.</del>                                                                                                                                                                                         |
| <b>Hub:</b> The rotating outer member of the axle's assembly which provides for wheel disc mounting.                                                                                                                                                                                    |
| <del><b>Hybrid power:</b> The use of two or more power sources to provide the motive force for the vehicle (e.g. electricity to drive the wheels with internal combustion to supplement the battery).</del>                                                                             |
| <del><b>Hybrid vehicle:</b> Generally refers to a vehicle designed to run on electric power and an internal combustion engine.</del>                                                                                                                                                    |
| <b>Hydrocarbons:</b> A gaseous compound formed by incomplete combustion and comprised of unburned and partially burned fuel. It combines with NOx and sunlight to form ozone and is a major contributor to smog.                                                                        |
| <del><b>Hydrogen fuel cell:</b> A chemical reaction process to develop electrical current from oxygen and hydrogen.</del>                                                                                                                                                               |
| <del><b>ICC:</b> The former Interstate Commerce Commission, the economic regulation agency within the Department of Transportation. The agency was disbanded in 1997 because of economic deregulation, and most functions were transferred to the Federal Highway Administration.</del> |
| <b>IDEA:</b> The Individuals with Disabilities Education Act, passed in 1990 as P.L. 101-476 (Part 13) as approved in March of 1999, to replace the EHA.                                                                                                                                |
| <b>IEP:</b> Individualized Education Program, a plan including information for each child with disabilities required under P. L. 101-476 (Part B).                                                                                                                                      |
| <del><b>IFSP:</b> Individualized Family Service Plan; a written plan similar to the IEP for the family of a child receiving early intervention services required under P. L. 102-119.</del>                                                                                             |
| <b>Impact test:</b> A simulated crash condition which evaluates the ability of a vehicle or any component or device to withstand crash forces; also known as sled test and crash test.                                                                                                  |
| <b>Inclusion:</b> Integration of a student with disabilities into a regular classroom and onto a regular school bus; also known as mainstreaming.                                                                                                                                       |
| <b>Incomplete vehicle:</b> An assemblage consisting, as a minimum, of frame and chassis structure, power train, steering system, suspension system and braking system (to the extent that those systems are to                                                                          |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| be part of the completed vehicle) and requiring further manufacturing operations other than the addition of readily attachable components, such as mirrors and tire and rim assemblies, or minor finishing operations such as painting, to become a completed vehicle.                                                                                                                                                                                                                               |
| <del><b>Injury incident, school bus:</b> Any non-crash injury sustained by a person while in the bus, or while boarding/leaving the bus.</del>                                                                                                                                                                                                                                                                                                                                                       |
| <b>In-service:</b> Training provided annually or more often to school bus-certified drivers.                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Inspection:</b> A close examination of a motor vehicle performed in accordance with local, state and/or federal requirements by an authorized agent of the local, state or federal government.                                                                                                                                                                                                                                                                                                    |
| <b>Integrated child safety seat:</b> A child safety seat meeting the requirements of FMVSS No. 213 which is built into and thus an integral part of a bench seat.                                                                                                                                                                                                                                                                                                                                    |
| <b>Integrated restraint system:</b> A system in which the occupant restraint of an individual in a wheelchair/mobility aid connects directly to, and is dependent upon, the mobility aid's securement system's rear strap assemblies.                                                                                                                                                                                                                                                                |
| <del><b>Intercity bus:</b> A large bus with front doors only, high-back seats and under floor luggage storage for high-speed, long distance trips; also known as motor coach and over-the-road coach.</del>                                                                                                                                                                                                                                                                                          |
| <del><b>Intermediate manufacturer:</b> A person, other than the incomplete vehicle manufacturer or the final-stage manufacturer, who performs manufacturing operations on an incomplete vehicle.</del>                                                                                                                                                                                                                                                                                               |
| <b>International symbol of accessibility:</b> A white emblem on blue background used to indicate that a vehicle can accommodate individuals with disabilities.                                                                                                                                                                                                                                                                                                                                       |
| <b>Jump seat:</b> A seat designed to fold down to provide supplemental seating in a bus (e.g. in the aisle, in front of the door or along the side wall); not permitted in school buses.                                                                                                                                                                                                                                                                                                             |
| <del><b>Kneeling bus:</b> A bus on which the front or rear end is lowered to allow easier access for passengers with disabilities.</del>                                                                                                                                                                                                                                                                                                                                                             |
| <b>Laminated glass:</b> Any glazing material that consists of one or more sheets of glass and an inboard-facing surface sheet of plastic, the components being held together by intervening plies of plastic interlayer or by the self-bonding characteristic of the inboard plastic layer.                                                                                                                                                                                                          |
| <b>Lap belt:</b> A Type I belt assembly meeting the requirements of FMVSS No. 209, intended to limit movement of the pelvis.                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Lap tray:</b> An accessory for a wheelchair or other mobile seating device, to offer support and convenience for the occupant.                                                                                                                                                                                                                                                                                                                                                                    |
| <del><b>Lap and /shoulder belt:</b> A Type 2 belt assembly meeting the requirements of FMVSS No. 210, intended to limit the movement of the pelvis and upper torso. A seat belt assembly (sometimes called a three-point belt because it has three points of anchorage, one near each hip and one above the shoulder) that must meet the requirements of FMVSS No. 209 and is intended to limit the movement of an occupant's pelvis and upper torso. NHTSA's terminology is Type 2 Seat Belt.</del> |
| <del><b>Late bus:</b> A bus scheduled to leave school at a time after the end of the school day, usually to provide transportation for students involved in after-school activities.</del>                                                                                                                                                                                                                                                                                                           |
| <del><b>Layover time:</b> Time built into a trip schedule between arrival and departure.</del>                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>LEA:</b> Local Education Agency.                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <del><b>Lean burn:</b> Uses more air than is needed for theoretical complete combustion. This added air allows combustion to take place at a lower temperature, thus reducing the emission of NOx and CO</del>                                                                                                                                                                                                                                                                                       |
| <b>Left:</b> Left position is determined from the normal driving position as seated in the driver's seat looking in the direction of forward travel.                                                                                                                                                                                                                                                                                                                                                 |
| <b>Liability insurance:</b> Protection against the claims of others for injury or property damage; also known as casualty insurance.                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Life cycle procurement:</b> A procurement contract based on both the initial capital cost and the cost of operation over the life of a vehicle.                                                                                                                                                                                                                                                                                                                                                   |

|                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Lift:</b> (See power lift.)                                                                                                                                                                                                                                                                                                                                                                |
| <del><b>Live time:</b> The time when students are on the bus, beginning when the first passenger boards and ending when the last passenger leaves.</del>                                                                                                                                                                                                                                      |
| <b>LNG:</b> Liquified Natural Gas.                                                                                                                                                                                                                                                                                                                                                            |
| <b>Load factor:</b> The ratio of passengers carried to the vehicle's passenger capacity.                                                                                                                                                                                                                                                                                                      |
| <b>Load:</b> To pick up students at a designated bus stop or at school.                                                                                                                                                                                                                                                                                                                       |
| <b>Loading zone:</b> Any area where students are boarding or leaving a school bus.                                                                                                                                                                                                                                                                                                            |
| <del><b>Locking ring:</b> A removable, split rim ring that holds the rim flange in place on a multi-piece rim.</del>                                                                                                                                                                                                                                                                          |
| <b>Longitudinal:</b> Parallel to the longitudinal centerline of the vehicle, front to rear.                                                                                                                                                                                                                                                                                                   |
| <b>Low profile:</b> A tire that has a section height that is less than 85 percent of its nominal section width (e.g., a tire with an aspect ratio of less than 0.85.)                                                                                                                                                                                                                         |
| <b>Low-bid procurement:</b> Competitive procedure in which the lowest bidder is awarded the contract.                                                                                                                                                                                                                                                                                         |
| <del><b>Low floor vehicle:</b> A bus in which the floor and entrance are closer to the ground, for easier access by students with disabilities or preschoolers.</del>                                                                                                                                                                                                                         |
| <b>LPG:</b> Liquified Petroleum Gas; also known as propane.                                                                                                                                                                                                                                                                                                                                   |
| <del><b>LRE:</b> Least Restrictive Environment, a concept embodied in IDEA which requires that children with disabilities be integrated as fully as possible into situations and settings with their nondisabled peers.</del>                                                                                                                                                                 |
| <b>Mainstreaming:</b> (See inclusion.)                                                                                                                                                                                                                                                                                                                                                        |
| <b>Manufacturer:</b> Any person engaged in the manufacturing or assembling of motor vehicles or item of motor vehicle equipment, including any person importing motor vehicle equipment for resale.                                                                                                                                                                                           |
| <b>MDC:</b> Multi-Disciplinary Conference, an assessment meeting for a student with disabilities which leads to an IEP. (See also assessment team.)                                                                                                                                                                                                                                           |
| <del><b>Mediation:</b> Efforts by a third party to bring about agreement between dissenting parties (e.g., labor and management or parents and school administration); usually less formal than arbitration.</del>                                                                                                                                                                            |
| <b>Medical support equipment:</b> Portable equipment used by students to maintain life functions, such as oxygen bottles, intravenous or fluid drainage apparatus.                                                                                                                                                                                                                            |
| <b>Medically fragile:</b> Refers to students who require specialized technological health care procedures for life support and/or health support.                                                                                                                                                                                                                                             |
| <del><b>Minibus:</b> A small school bus, usually a Type A-1 or A-2 or Type 13-1 or B-2.</del>                                                                                                                                                                                                                                                                                                 |
| <del><b>Minivan:</b> A multi-purpose vehicle (MPV) designed to carry seven to ten passengers.</del>                                                                                                                                                                                                                                                                                           |
| <b>Mirrors:</b> The system of mirrors required to be installed on school buses in accordance with FMVSS No. III and applicable state laws.                                                                                                                                                                                                                                                    |
| <del><b>MIS:</b> Management Information System; a means of data collection for analysis by management.</del>                                                                                                                                                                                                                                                                                  |
| <b>Mobility aid:</b> A wheelchair or other device, either battery-powered or manual, that is used to support and convey a person with a physical disability; also known as mobile seating device.                                                                                                                                                                                             |
| <b>Modesty panel:</b> A panel located in front of a seat or row of seats, usually supported by a stanchion and cross bar, which does not meet the performance standards of a barrier as defined in FMVSS No. 222; or a short panel which extends from the bottom of a barrier to or near to the floor for the purpose of reducing the draft from the entrance door; also known as kick panel. |



**Monitor:** A person assigned to assist the driver on a school bus or school vehicle.

~~**MPV:** Multipurpose Passenger Vehicle, any vehicle with a seating capacity of ten or fewer, including the driver, which is built on a truck chassis, or with special features for occasional off-road use.~~

~~**MRO:** Medical Review Officer, a licensed physician with knowledge of substance abuse disorders required by 49 CFR 40 to receive and evaluate laboratory results generated by a carrier's drug testing program.~~

**Multi-Function School Activity Bus (MFSAB):** A school bus whose purposes do not include transporting students to and from home or school bus stops. This subcategory of school bus meets all ~~Federal Motor Vehicle Safety Standards (FMVSS)~~ for school buses and meets all regulations for school buses, except the traffic control devices, color, use of cruise control, and seating requirements.

~~**MVR:** Motor Vehicle Record of the driver; also known as driving history.~~

~~**NAPT:** National Association for Pupil Transportation, a membership organization comprised of individuals and organizations representing all facets of school transportation.~~

**NASDPTS:** National Association of State Directors of Pupil Transportation Services, a membership organization comprised of primarily state officials responsible for pupil transportation.

**National School Bus Yellow:** (NSBY) The color defined in the publication "National School Bus Color Standard" SBMTC008.

~~**NDR:** National Driver Registry.~~

~~**Nebula combustion chamber:** A unique high-turbulence combustion chamber in the top of a piston, which is particularly effective in efficient burning of lean gas-air mixtures.~~

~~**Neutral safety switch:** A device which prevents the bus from starting unless the transmission is in neutral gear or the clutch is depressed.~~

**NFPA:** National Fire Protection Association.

~~**NGV:** Natural Gas Vehicle.~~

**NHTSA:** National Highway Traffic Safety Administration, an agency of the U.S. Department of Transportation.

~~**NIST:** National Institute of Standards and Technology.~~

~~**Nominal dimension:** A dimension which exists in name only (e.g., 5/8" plywood which is actually 19/32" thick, but is 5/8" nominal thickness.) The variation between the actual dimension and the nominal dimension is the result of manufacturing practices and tolerances.~~

~~**Nonconforming bus:** Any vehicle designed to carry more than ten (10) passengers that is used to transport children to or from school or school-related activities which does not meet the federal standards specific to school buses.~~

~~**Non-conforming van:** A vehicle smaller than a bus, designed to carry seven to ten passengers and used to transport students, that does not meet FMVSS for school buses.~~

~~**NOx:** Nitrogen oxides~~

~~**NPRM:** Notice of Proposed Rulemaking, a notice published in the Federal Register by a federal agency of a proposed change in regulation.~~

~~**NSC:** National Safety Council.~~

~~**NSTA:** National School Transportation Association, a membership organization comprised of primarily school transportation contractor companies.~~

~~**NTSB:** National Transportation Safety Board, an independent federal agency authorized by Congress to investigate accidents and to issue safety recommendations.~~

~~**OCR:** Office of Civil Rights, an agency of the U.S. Department of Education.~~

~~**Octane number:** A measure of anti-knock properties of a fuel that relates to spark ignition engines. The higher the number, the more resistant to knocking. Higher output and more efficient engine designs can be used with higher octane fuel.~~

**OEM:** Original Equipment Manufacturer.

~~**On-board monitoring system:** Computerized tracking of driver and vehicle performance, including speed, fuel consumption, etc.~~

~~**Operating costs:** All costs associated with running the transportation system, which are distinct from capital costs.~~

**Operator:** The carrier who is responsible for running the transportation system, regardless of ownership of the vehicle.

~~**OSEP:** Office of Special Education Programs, an agency of the U.S. Department of Education.~~

~~**OSERS:** Office of Special Education and Rehabilitative Services, an agency of the U.S. Department of Education.~~

**OSHA:** Occupational Safety and Health Administration, an agency of the U.S. Department of Labor.

~~**OTETA:** The Omnibus Transportation Employees Testing Act of 1991, requiring drivers holding CDLs to participate in a drug and alcohol testing program.~~

**Out of Service:** The removal of a school bus from passenger service due to a defective condition.

**Overall vehicle width:** The nominal design dimension of the widest part of the vehicle, exclusive of signal lamps, marker lamps, outside rearview mirrors, flexible fender extensions and mud flaps, determined with the doors and windows closed and the wheels in the straight-ahead position.

**Overhang:** The distance from the center of the rear axle to the rearmost end of the body or from the center of the front axle to the forward edge of the front bumper.

**Ozone:** A pollutant formed from nitrogen oxides (NOx), hydrocarbons and sunlight. This gas has an irritating odor, is poisonous and is used as an oxidizing agent for bleaching.

~~**P-A system:** A public address system which allows the driver of a bus to communicate with persons inside and/or outside the bus through a speaker installed on the inside and/or outside of the bus, also known as external loudspeaker.~~

**P.L. 94-142:** (See EHA.)

~~**Para transit:** Public transit service which is more flexible than a fixed-route system, commonly providing special service for elderly and disabled passengers.~~

~~**Parallel restraint system:** A system in which the occupant restraint lap belt anchors directly to the floor track or plates, and is independent of the wheelchair/mobility aid securement system.~~

**Parking brake:** A mechanism designed to prevent the movement of a stationary motor vehicle.

**Passenger vehicle:** means a motor vehicle that is designed to transport 8 to 15 passengers and is the size and style of vehicle necessary to meet the needs of the school district; and insured in accordance with the minimum coverage requirements established in 20-10-109, MCA. A district may use a passenger vehicle to transport students on an activity trip. A district may not use a passenger vehicle to transport students to or from school on a school bus route. A passenger vehicle does not include Type E school buses.

**Part B:** Refers to the section of the EHA applicable to special education and related services for children with disabilities and to the implementing regulations at 34 CFR 300.

~~**Part H:** Refers to the section of the IDEA related to early intervention services for infants and toddlers and to the implementing regulations at 34 CFR 303.~~

**Particulate trap:** A device on diesel buses to clean the exhaust of particulate matter. An exhaust

treatment device used to collect (trap) and periodically burn off particulates and other potential problem emission gases formed in engine exhaust.

**Particulates:** Small solid particles (soot, etc.) formed by engine combustion. Visible particulates are seen in smoke; however, invisible particles may be present in smokeless exhaust.

**Passenger miles:** The LOW number of miles traveled by the aggregate number of passengers on a vehicle (e.g., ten students traveling ten miles on one bus equals 100 passenger miles.)

**Pilot ignition engine:** An engine using a small quantity of diesel fuel to provide an ignition source for an alternative fuel that will not ignite on its own in a compression cycle.

**Piloted hub mounting:** A wheel mounting system wherein the wheel centering is provided by a close fit between the wheel disc and the hub.

**Port injection:** Similar to the throttle body system except that the fuel is injected near each cylinder intake port. The injectors and their controls can be individually controlled for maximum performance and emissions control.

**Positive locking:** A design feature of the mobility aid securement and occupant restraint system where the attachment and anchoring hardware cannot be inadvertently released or disengaged once properly installed.

**Post-trip interior inspection:** A check of the interior of the bus by the driver at the end of the run to ensure that no children or student belongings have been left behind.

**Postural support:** A seat, belt or other component used to support a child with disabilities in a desired position but not designed or intended to provide occupant restraint in a crash; also known as positioning device.

**Power base:** A powered, wheeled platform used to mount a seating device for carrying an individual with a disability; usually characterized by smaller diameter tires.

**Power cut-off switch:** A device that cancels all power from the vehicle batteries.

**Power lift:** A mechanized platform designed to provide access to a vehicle for an occupied mobility aid/wheel chair; also known as a wheelchair lift.

**Powertrain:** The group of components used to transmit engine power to the wheels; includes transmission, universal joints, driveshaft, drive axles and gears; also known as drive train.

**Preschool:** Refers to a child between the ages of three and five years who is not yet in kindergarten or to a program serving children in that age range.

**Pre-service:** Training provided to driver applicants prior to school bus certification and/or transporting students.

**Pre-trip inspection:** A systematic inspection of the bus by the driver before every trip or shift to ensure that the bus is in safe operating condition. The same procedure performed after the trip/shift is the post-trip inspection.

**Preventable:** A crash that could have been prevented by reasonable action on the part of the school bus driver.

**Privatization:** The process of transferring the operation of public services from the public agencies to private companies or nonprofit organizations; also known as contracting or outsourcing.

**Pusher:** A school bus in which the engine is mounted in the rear of the vehicle; also known as rear-engine bus.

**Pushout window:** A bus window that is hinged at the top or front to enable the window to be swung upward or outward relative to the side of the bus and to provide a means of emergency egress from the bus; also known as emergency window.

**Radial:** A pneumatic tire in which the ply cords which extend to the beads are laid substantially at 90 degrees to the centerline of the tread.

**Railroad crossing:** The intersection of a highway, street or roadway and railroad tracks; also known as grade crossing.

**Ramp:** An inclined plane for use between the ground and the floor of the vehicle to permit access by persons in wheelchairs/mobility aids.

**Reaction distance:** Distance a vehicle travels during the time it takes for a driver to recognize the need to stop and to apply the brakes.

**Reclining seat:** An activity seat with a reclining seat back; not permitted in school buses.

**Reduced capacity:** The capacity that is achieved when one or more seats are removed from the standard design during or after manufacture of the vehicle. =

**Reflective:** Refers to the property of materials that cause them, when they are illuminated, to reflect the light to some extent.

**Reformulated gasoline:** Also known as “oxygenated gasoline,” reformulated gasoline has oxygen added to improve combustion and reduce emissions.

**Related services:** Transportation and other supportive services that are required to assist a child with a disability to benefit from special education.

**Remanufactured:** Refers to a vehicle component that has been structurally restored.

**Reportable:** A crash required to be reported under FMCSR (i.e. a crash involving a CMV on a public road in which there is a fatality or an injury treated away from the scene, or that requires a vehicle to be towed from the scene).

**Repower installation:** A dedicated natural gas or other engine which was not part of the original chassis at the time of manufacturing.

**RESNA:** Rehabilitation Engineering Society of North America, an organization engaged in research and development of assistive technology for persons with disabilities.

**Restraining barrier:** An assembly similar to a seat back located immediately in front of a single school bus passenger seat or row of seats to provide crash protection in accordance with FMVSS No. 222; also known as barrier, crash barrier, and seat barrier.

**Restraint system:** A generic term for one or more devices intended to secure and protect a passenger with or without a mobility aid in a vehicle, including lap belts, lap and /shoulder belts, child safety seats, safety vests, etc.

**Restraint/securement system:** (See securement and restraint system.)

**Retarder:** An auxiliary braking device used to reduce brake wear.

**Retractor, automatic locking:** A retractor incorporating adjustment by means of a positive self-locking mechanism which is capable of withstanding restraint forces.

**Retractor, emergency locking:** A retractor that incorporates adjustment by means of a locking mechanism that is activated by vehicle acceleration, webbing movement relative to the vehicle, or automatic action during an emergency, and that is capable of withstanding restraint forces.

**Retread:** A worn tire casing to which tread rubber has been affixed to extend the usable life of the tire; also known as re-capped or retreaded tire.

**Retro reflective:** Refers to material that is designed to return illumination of the material directly or generally back to the source of illumination.

**RFID:** Radio Frequency Identification, use of electromagnetic fields to capture and transfer data

**RFP:** Request For Proposals, an invitation to submit a contract proposal, less restrictive than an invitation to bid on a contract.

|                                                                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Ridership:</b> The number of passengers using a transportation system during a given period.                                                                                                                                                                                            |
| <b>Right:</b> Right position is determined from the normal driving position as seated in the driver's seat looking in the forward direction of travel.                                                                                                                                     |
| <b>Rim:</b> The part of the wheel on which the tire is mounted and supported.                                                                                                                                                                                                              |
| <del><b>Risk management:</b> Practices and procedures designed to protect against losses from accidents, passenger and worker injuries, vehicle damage and other losses, and to reduce insurance costs.</del>                                                                              |
| <u><b>Roadway:</b> According to 61-8-102(2)(v), MCA, roadway means the portion of a highway that is improved, designed, or ordinarily used for vehicular travel, including the paved shoulder.</u>                                                                                         |
| <del><b>Rolling stock:</b> The vehicles in a transportation system.</del>                                                                                                                                                                                                                  |
| <b>Roof hatch:</b> (See emergency roof exit.)                                                                                                                                                                                                                                              |
| <del><b>Route miles:</b> The total number of miles in one or more routes in the system.</del>                                                                                                                                                                                              |
| <del><b>Route sheet:</b> A list of all the designated stops on a route.</del>                                                                                                                                                                                                              |
| <b>Route:</b> means a Board of Trustees of a school district and the County Transportation Committee approved designated course regularly traveled by a school bus to pick up students and take them to school, or to deliver students from school to their homes or designated bus stops. |
| <b>Run:</b> A complete trip on a route. (To illustrate the difference between a run and a route: it is possible to have six daily runs on the same route, i.e., one high school, one middle school, and one elementary run both morning and afternoon.)                                    |
| <del><b>Running gear:</b> The wheels, axles, springs, frames and other carrying parts of the vehicle.</del>                                                                                                                                                                                |
| <b>SAE:</b> Society of Automotive Engineers, the leading standards-writing organization for the automotive industry.                                                                                                                                                                       |
| <b>Safety glass:</b> Glazing material constructed, treated or combined with other materials so as to reduce, in comparison with ordinary glass, the likelihood of injury to persons as a result of contact with the glass, either broken or unbroken.                                      |
| <b>Safety patrol:</b> Students whose duties may include acting as crossing guards and safety assistants.                                                                                                                                                                                   |
| <del><b>Safety training:</b> Educational programs provided for students to teach proper behavior while waiting for, riding in, boarding or leaving school buses; also known as ridership programs.</del>                                                                                   |
| <del><b>Safety vest/harness:</b> An upper torso restraint that supports and secures a child by attachment to the vehicle seat.</del>                                                                                                                                                       |
| <b>Safety:</b> A monitor whose primary responsibility is to ensure the safety of students getting on and off the bus and to check the loading zone before the driver pulls out.                                                                                                            |
| <del><b>SAP:</b> Substance Abuse Professional, a licensed physician, psychologist, social worker or alcohol and drug counselor who is required to evaluate any employee who violates a carrier's drug and alcohol testing program.</del>                                                   |
| <b>SBMTC:</b> School Bus Manufacturers Technical Council; formerly the School Bus Manufacturers Institute (SBMI), a membership organization within NASDPTS which serves as a technical advisor regarding school buses.                                                                     |
| <b>School bus equipment:</b> Equipment designed primarily as a system, part or component of a school bus, or any similar part or component manufactured or sold for replacement or as an accessory or addition to a school bus.                                                            |
| <b>School bus stop:</b> An area on the street or highway designated by school officials for picking up and discharging students.                                                                                                                                                           |

**School bus:** A bus owned, leased, contracted to or operated by a school or school district that complies with the Board of Public Education school bus standards as verified by the Department of Justice’s semiannual inspection and regularly used to transport students to and from school or school-related

activities, but not including a charter bus or transit bus; must meet all applicable FMVSSs, and is readily identified by alternately flashing lights, National School Bus Yellow paint, and the legend “School Bus.” A school bus includes Type E School Buses. A school bus does not include (as defined in 20-10-101, MCA):

- Privately owned and not operated for compensation vehicles;
- Privately owned and operated for reimbursement under [MCA](#), 20-10-142, [MCA](#);
- Either district-owned or privately owned, designed to carry not more than nine passengers, and used to transport pupils to or from activity events or to transport pupils to their homes in case of illness or other emergency situations; or
- [An over-the-road passenger coach or passenger vehicle used only to transport students for activity trips.](#)

**School trip:** (See activity trip.)

**School vehicle:** Any vehicle owned, leased, contracted to or operated by a school or school district and regularly used to transport students to and from school or school-related activities. Includes school buses, activity buses, vans and passenger vehicles, but does not include transit or charter buses.

**School:** An educational institution for children at the [pre-primary early childhood education](#), primary, elementary, or secondary level, [including nursery schools and Head Start programs, but not including daycare programs.](#)

~~**Scooter:** A motorized mobility aid with three wheels, handlebar or tiller and a swiveling seat.~~

~~**SEA:** State Education Agency~~

**Seat belt:** (See seat restraints.)

**Seat restraints:** A passenger restraint system incorporating lap belts or lap [and](#) /shoulder belts and meeting the requirements of FMVSS Nos. 209 and 210.

**Seat:** A device designed and installed to provide seating accommodations.

**Seating capacity:** The number of designated seating positions provided in a vehicle, including the driver’s position. In determining seating capacity, each wheelchair securement location shall be counted as four (4) designated seating positions.

**Seating position:** The space on a school bus bench seat designated for one student. The number of such positions per seat is determined by dividing the width of the seat by 15" and rounding to the nearest whole number, as described in FMVSS No. 222.

**Seating reference point:** The manufacturer’s design point, with coordinates relative to the vehicle structure, which establishes the rearmost normal driving or riding position of each designated seating position and simulates the position of the pivot center of the human torso and thigh.

~~**Section 402:** Section of 23 CFR that authorizes grant funds for highway safety projects.~~

~~**Section 504:** Section of the Rehabilitation Act of 1973, PL 93-112, which prohibits discrimination against individuals with disabilities by any recipient of federal funding.~~

**Securement and restraint system:** The total system which secures and restrains both a wheelchair/mobility aid and its occupant; also known as WTORS.

**Securement points:** Locations on the base or seat frame of the wheelchair/mobility aid where the securement system should be attached.

**Securement system:** The means of securing a mobile seating device to a vehicle in accordance with



|                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| FMVSS No. 222, including all necessary buckles, anchors, webbing/straps and other fasteners.                                                                                                                                                                                                                                                                                     |
| <b>Seizure:</b> A reaction to an electrical discharge in the brain, resulting in symptoms which can range from a blank stare of a few seconds to full convulsions.                                                                                                                                                                                                               |
| <del><b>Self insured:</b> Refers to a company or school district which provides reserved funds against claims or losses.</del>                                                                                                                                                                                                                                                   |
| <b>Sensor:</b> An electronic device installed on a school bus for the purpose of detecting animate objects in the loading zone; also known as object detection system.                                                                                                                                                                                                           |
| <b>Service animal:</b> An animal trained to aid with persons with disabilities; may be a guide animal or, assistive animal.                                                                                                                                                                                                                                                      |
| <b>Service brake:</b> The primary mechanism designed to retard and stop a moving vehicle.                                                                                                                                                                                                                                                                                        |
| <del><b>Shuttle:</b> A trip run back and forth over a short route (e.g. between two schools.)</del>                                                                                                                                                                                                                                                                              |
| <del><b>Siped:</b> A tire which has been scored or cut perpendicular to the direction of rotation (across the tread) to improve traction.</del>                                                                                                                                                                                                                                  |
| <del><b>Skid plate:</b> Stout metal plate attached to the underside of a vehicle to protect the oil pan, transmission, step well or fuel tank from scraping on rocks, curbs and road surface.</del>                                                                                                                                                                              |
| <del><b>Slack adjuster:</b> Adjustable device connected to the brake chamber pushrod used to make up for brake shoe wear.</del>                                                                                                                                                                                                                                                  |
| <b>Snow:</b> A tire with an obvious aggressive or lug type tread across the entire width which is designed to be self-cleaning.                                                                                                                                                                                                                                                  |
| <b>SOS lights:</b> Stop on Signal lights. (See alternately flashing signal lights.)                                                                                                                                                                                                                                                                                              |
| <del><b>SOWAT:</b> The Subcommittee on Wheelchairs and Transportation, a group acting under the auspices of RESNA to develop transportable wheelchair crashworthiness standards.</del>                                                                                                                                                                                           |
| <b>Special education:</b> Specially designed instruction to meet the unique needs of a child with disabilities.                                                                                                                                                                                                                                                                  |
| <b>Specially equipped school bus:</b> Any school bus designed, equipped or modified to accommodate students with special needs.                                                                                                                                                                                                                                                  |
| <del><b>Specially equipped:</b> A school bus designed, equipped, or modified to accommodate students with special needs.</del>                                                                                                                                                                                                                                                   |
| <del><b>Split brake system:</b> A service brake system with two separate hydraulic circuits which, upon failure of either, retains full or partial braking ability.</del>                                                                                                                                                                                                        |
| <del><b>Spoke wheel:</b> A rotating member which provides for mounting and support of one or two demountable rims; also known as wheel for demountable rim.</del>                                                                                                                                                                                                                |
| <b>Stanchion:</b> An upright post or bar, usually installed from floor to ceiling in a bus, which provides support for other structural members and/or provides a hand-hold for passengers.                                                                                                                                                                                      |
| <del><b>State Director:</b> The chief government administrator in charge of a state's pupil transportation program and responsible for oversight of regulatory functions.</del>                                                                                                                                                                                                  |
| <b>State:</b> As used in this document, "state" shall refer to any of the 50 states and commonwealths and any United States territory, possession, or federal agency (e.g., the General Services Administration or the Department of Defense) that may consider, follow or adopt part or all the specifications and procedures contained herein for school buses and operations. |
| <del><b>Stoichiometric burn:</b> Use of fuel and air (or oxygen) in the exact ratio needed for complete combustion to generate maximum efficiency and power.</del>                                                                                                                                                                                                               |
| <b>Stop arm:</b> A device in the form of a red octagon extending outward from the side of a school bus to signal that the bus has stopped to load or unload passengers and meeting FMVSS No. 131; also known as stop semaphore and stop signal arm.                                                                                                                              |
| <b>Stopping distance:</b> Braking distance plus reaction distance.                                                                                                                                                                                                                                                                                                               |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Storm window:</b> Two or more sheets of safety glazing material separated by an airspace to provide insulating properties and fixed in a common frame or mounting.                                                                                                                                                                                                                                                                                                                                                     |
| <b>Strobe light:</b> A bright short duration light that flashes as a result of an electronic discharge of electricity through a gas.                                                                                                                                                                                                                                                                                                                                                                                      |
| <del><b>Stroller:</b> A light weight folding mobility aid.</del>                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Studded:</b> A tire to which metal protrusions have been added to improve traction.                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <del><b>Student rides:</b> The number of students transported in a given system multiplied by the number of one-way trips in a school bus. (For example, a school district that transports 1000 students provides 2000 student rides daily or 360,000 student rides to and from school annually, assuming 180 school days. To determine the total number of student rides annually, the district would add the actual or estimated number of students transported on activity trips [times 2] to the figure above.)</del> |
| <b>Student:</b> Any child who attends a school, as previously defined.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Substitute driver:</b> A driver who is not assigned to a regular route but is employed to provide immediate coverage when necessary due to driver absences or emergencies; also known as spare driver and extra board driver.                                                                                                                                                                                                                                                                                          |
| <b>Surrogate wheelchair:</b> A wheelchair device which is subjected to impact tests to test securement and restraint systems.                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Suspension system:</b> The components of the vehicle that transmit the load of the vehicle's weight from the chassis framework to the ground, including the springs, axles, wheels, tires and related connecting components.                                                                                                                                                                                                                                                                                           |
| <del><b>TDD:</b> Telecommunication devices for the deaf.</del>                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Temperature control system:</b> The means of heating or cooling the interior of the vehicle.                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Tempered glass:</b> Glazing which consists of glass that has been tempered to meet the properties of safety glass.                                                                                                                                                                                                                                                                                                                                                                                                     |
| <del><b>Tether:</b> An upper anchor strap used in addition to a seat belt to hold certain types of restraint devices in place.</del>                                                                                                                                                                                                                                                                                                                                                                                      |
| <del><b>Texting:</b> Manually entering, or reading from, an electronic device. Texting includes short message services, emailing, instant messaging, a command or request to access a web page, or engaging in any other form of electronic text retrieval or entry, for present or future communication.</del>                                                                                                                                                                                                           |
| <del><b>Throttle body injection:</b> A gasoline fuel injection system in which the fuel is injected directly into the air intake pipe or manifold. No carburetor is required; electronics monitor engine variables and control the rate of fuel injected.</del>                                                                                                                                                                                                                                                           |
| <del><b>Tie-down system:</b> (See securement system.)</del>                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <del><b>Tier:</b> Any level of separate runs and routes designed to allow a single bus to complete multiple routing assignments. Multiple assignments typically require the use of staggered school schedules, permitting multiple levels or "tiers" for the daily assignments.</del>                                                                                                                                                                                                                                     |
| <del><b>Tire cords:</b> The strands forming the reinforcement structure in a tire.</del>                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Tire:</b> The continuous solid or pneumatic rubber elastomeric cushion encircling a wheel intended for contact with the road.                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>To-and-from school:</b> Transportation from home to school and from school to home; also transportation from school to school or from school to job training site.                                                                                                                                                                                                                                                                                                                                                     |
| <b>Tour:</b> Transportation of a group on a longer trip, usually by charter bus (e.g., senior class trip to Washington.)                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Tow hooks:</b> Attachments on the chassis frame for use in towing the vehicle backwards or forwards; also known as tow eyes.                                                                                                                                                                                                                                                                                                                                                                                           |

|                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Track seating:</b> A seating system in which seating units, including mobility aids, are secured to the vehicle structure by attaching them to tracks on the vehicle floor.                                                                                                                                                                                           |
| <b>Traffic lights:</b> Traffic signals which control the flow of traffic at intersections.                                                                                                                                                                                                                                                                               |
| <b>Transit bus:</b> A bus designed for frequent stops, with front and back-center doors and low-back seating, operated on a fixed schedule and route to provide public transportation by indiscriminately taking on passengers at designated bus stops.                                                                                                                  |
| <b>Transportation:</b> the conveyance of a pupil by a school bus between the pupil's legal residence or an officially designated bus stop and the school designated by the trustees for the pupil's attendance.                                                                                                                                                          |
| <b>Transverse:</b> Perpendicular to the longitudinal centerline of the vehicle (i.e., from side to side.)                                                                                                                                                                                                                                                                |
| <b>Trip:</b> The transportation of students from school to any destination, followed by a return trip back to school. The two together make a round trip.                                                                                                                                                                                                                |
| <del><b>Tripper service:</b> Regularly scheduled mass transit service which is open to the public, and which is designed or modified to accommodate the needs of school students and personnel, using various fare collections or subsidy systems. Must be part of the regular route service as indicated in published route schedules.</del>                            |
| <del><b>Turbocharger:</b> A device which uses the pressure of exhaust gases to drive a turbine that, in turn, pressurizes air normally drawn into the engine's chambers.</del>                                                                                                                                                                                           |
| <del><b>Turnkey:</b> Partial privatization in which a school district hires a company to supply drivers, maintenance management and/or vehicles; also known as management contract.</del>                                                                                                                                                                                |
| <b>Two-way radio:</b> Electronic communication system which uses a designated airway for transmission between a bus and a base station.                                                                                                                                                                                                                                  |
| <b>Type A:</b> A Type "A" school bus is a conversion or bus constructed utilizing a cutaway front section vehicle with a left side driver's door. This definition includes two classifications: Type A-1, with a Gross Vehicle Weight Rating (GVWR) of 10,000 pounds or less; and Type A-2, with a GVWR greater than 10,000 pounds.                                      |
| <b>Type B:</b> A Type "B" school bus is constructed utilizing a stripped chassis. The entrance door is behind the front wheels. This definition includes two classifications: Type B-1, with a GVWR of 10,000 pounds or less; and Type B-2, with a GVWR greater than 10,000 pounds.                                                                                      |
| <b>Type C:</b> A Type "C" school bus is constructed utilizing a chassis with a hood and front fender assembly. The entrance door is behind the front wheels; also known as a conventional school bus.                                                                                                                                                                    |
| <b>Type D:</b> A Type "D" school bus is constructed utilizing a stripped chassis. The entrance door is ahead of the front wheels; also known as transit-style school bus or forward-control vehicle.                                                                                                                                                                     |
| <b>Type E:</b> A Type "E" school bus vehicle is district-owned, is designed to carry 10 or fewer passengers, has an overall safety rating of five stars from the national highway traffic safety administration NHTSA at the time of purchase, is insured in accordance with minimum coverage requirements set forth in 20-10-109, MCA, and is purchased after 7/1/2017. |
| <del><b>UCRA:</b> Universal child restraint anchorage, a standardized means of installing child restraint systems in vehicles that is independent of the seat belt system. UCRA's will be required in all new motor vehicles under 10,000 pounds, including school buses, as of September 2002.</del>                                                                    |
| <del><b>UL:</b> Underwriters Laboratory.</del>                                                                                                                                                                                                                                                                                                                           |
| <b>UMTA:</b> Urban Mass Transit Administration, predecessor to FTA.                                                                                                                                                                                                                                                                                                      |
| <b>Universal precautions:</b> Method of infection control designed to protect the individual from exposure to disease, which requires that all bodily fluids and secretions are treated as though they were infectious.                                                                                                                                                  |
| <b>Unload:</b> To discharge passengers from a school bus.                                                                                                                                                                                                                                                                                                                |

|                                                                                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Unloaded vehicle weight:</b> The weight of vehicle with maximum capacity of all fluids necessary for operation, but without cargo or occupants or accessories that are ordinarily removed from the vehicle when they are not in use.                                                   |
| <del>UST: Underground storage tank.</del>                                                                                                                                                                                                                                                 |
| <del>Vaporlock: Boiling or vaporization of fuel in the lines from excessive heat, which interferes with liquid fuel movement and in some cases, stops the flow.</del>                                                                                                                     |
| <del>Vehicle miles: The aggregate number of miles a vehicle travels in a given period.</del>                                                                                                                                                                                              |
| <del>Video system: A means of monitoring student behavior in a school bus. The system includes one or more video cameras to record activity. Camera housing units mounted in each bus appear to hold a camera, whether or not one is actually in place; also known as surveillance.</del> |
| <del>VIN: Vehicle Identification Number, a series of Arabic numbers and Roman letters which is assigned to a motor vehicle for identification purposes.</del>                                                                                                                             |
| <del>Viscosity: A measure of internal resistance to flow or motion offered by a fluid lubricant.</del>                                                                                                                                                                                    |
| <b>Walking distance:</b> The maximum distance a student can be required to walk to school before transportation must be provided.                                                                                                                                                         |
| <del>Weather emergencies: Weather conditions that require a deviation from normal transportation procedures (e.g., flooding, snowstorm.)</del>                                                                                                                                            |
| <del>Weight distribution: The distribution proportion of the vehicle load divided between the front and rear axles.</del>                                                                                                                                                                 |
| <b>Wheel:</b> A rotating load-carrying member between the tire and the hub, usually consisting of two major parts, the rim and the wheel disc, which may be integral, permanently attached or detachable.                                                                                 |
| <b>Wheelbase:</b> The distance between the front and rear axles.                                                                                                                                                                                                                          |
| <b>Wheelchair lift:</b> (See power lift.)                                                                                                                                                                                                                                                 |
| <b>Wheelchair:</b> A seating system comprising at least a frame, seat and wheels for the support and mobility of a person with physical disabilities; also known as mobile seating device.                                                                                                |
| <b>WTORS:</b> Wheelchair tie down and occupant restraint system                                                                                                                                                                                                                           |
| <del>ZEB: Zero-emissions bus.</del>                                                                                                                                                                                                                                                       |
| <del>ZEV: Zero-emissions vehicle.</del>                                                                                                                                                                                                                                                   |

## ~~APPENDIX B—NATIONAL SCHOOL TRANSPORTATION SPECIFICATION AND PROCEDURES~~

### ~~SCHOOL BUS CHASSIS AND BODY~~

#### ~~NATIONAL SCHOOL BUS YELLOW~~

~~The color known as National School Bus Yellow is specified and described in the School Bus Manufacturers Technical Council publication “National School Bus Yellow Color Standard” (SBMTC-008).~~

#### ~~BUS BODY HEATING SYSTEM TEST~~

##### ~~1. Scope~~

~~This procedure, limited to liquid-coolant systems, establishes uniform cold-weather bus-vehicle heating system test procedures for all vehicles designed to transport ten (10) or more passengers. Required test equipment, facilities and definitions are included. SAE J381 and SAE J382 establish defrosting and defogging procedures and requirements, which are hereby included by reference.~~

## **1.1—Purpose**

This procedure is designed to provide bus manufacturers with a cost effective, standardized test method to provide relative approximations of cold weather interior temperatures.

## **2.——Definitions**

**2.1——Heat Exchanger System**—Means will exist for providing heating and windshield defrosting, and defogging capability in a bus. The system shall consist of an integral assembly, or assemblies, having a core assembly or assemblies, blower(s), fan(s), and necessary duct systems and controls to provide heating, defrosting and defogging functions. If the bus body structure makes up some portion of the duct system this structure or assimilation of this structure must be included as part of the system.

**2.2——Heat Exchanger Core Assembly**—The core shall consist of a liquid to air heat transfer surface(s), liquid inlet and discharge tubes or pipes.

**2.3——Heat Exchanger Defroster Blower**—An air moving device(s) compatible with energies available on the bus body.

**2.4——Coolant**—A 50-50 solution of commercially available glycol antifreeze and commercial purity water. Commercial purity water is defined as that obtained from a municipal water supply system.

**2.5——Heat Exchanger Defroster Duct System**—Passages that conduct inlet and discharge air throughout the heater system. The discharge outlet louvers shall be included as part of the system.

**2.6——Heater Test Vehicle**—The completed bus as designed by the manufacturer with, or without, a chassis, engine and driver train, including the defined heat exchanger system. If the vehicle is without a chassis, it shall be placed on the test site in such a way that the finished floor of the body is at a height, from the test site floor, equal to its installed height when on a chassis, and all holes and other openings normally filled when installed on a chassis will be plugged.

**2.7——Heat Transfer**—The transfer of heat from liquid to air is directly proportional to the difference between the temperatures of the liquid and air entering the transfer system, for a given rate of liquid and air flow measured in pounds per minute, and that heat removed from liquid is equal to heat given to air.

## **3.——Equipment**

**3.1——Test Site**—A suitable location capable of maintaining an average ambient temperature not to exceed 25 degrees Fahrenheit (-3.9 degrees Celsius for the duration of the test period. The maximum air velocity across the vehicle shall be 5 mph(8kph).

**3.2——Coolant Supply**—A closed loop system, independent of any engine/drive train system, capable of delivering a 50-50 (by volume) solution of anti-freeze-water, as defined in 2.4, at 150 degrees +1-5 degrees (65.5 degrees +/- 1.70C) above the test site ambient temperature, and 50 lbs. (22.7 kg) per minute flow. The coolant supply device shall be equipped with an outlet diverter valve to circulate coolant within the device during its warm-up period. The valve will then permit switching the coolant supply to the bus heat exchanger system at the start of the test.

**3.3——Power Equipment Supply**—A source capable of providing the required test voltage and current for the heater system.

**3.4——Heat Exchange Units**—The heat exchangers used shall be labeled as specified by the School Bus Manufacturer's Technical Council No. 001 (Revised 4/94). The test rating of each unit, and quantity used, shall be recorded.

## **4.——Instrumentation**

### **4.1——Air Temperature**

**4.1.1 — Interior** Recommended air temperature measuring instrumentation are thermocouples or RTD's. Thermometers are not recommended because of their slow response to rapid temperature changes. Measuring instrumentation shall be placed on alternate seat rows beginning 39 inches  $\pm$  5 inches (99 cm  $\pm$  13 cm) from the rear of the body, at 36 inches  $\pm$  2 inches (91 cm  $\pm$  5 cm) from the finished floor of the body, and on the longitudinal centerline of the body.

**4.1.2 — Ambient** A set of four (4) of electrically averaged temperature measuring devices shall be placed 18 inches  $\pm$  5 inches (46 cm  $\pm$  13 cm) from the nearest body surface, 96  $\pm$  5 in (243 cm  $\pm$  13 cm) above the floor of test site. One measuring device shall be placed at each of the following locations:

- (1) — Midline of body forward of windshield;
- (2) — Midline of body aft of the rear surface; and
- (3) — Midway between the axles on the right and left sides of the body.

**4.1.3 — Driver** Measuring devices shall be placed at appropriate locations to measure ankle, knee, and breath level temperatures with the driver's seat in rear-most, lowest and body-center most position.

(1) — Ankle Level Place a minimum of four (4) electrically averaged temperature measuring devices at the corners of a 10 X 10 inch (25 X 25 cm) square area, the rear-most edge of which begins 8 inches (20 cm) forward of the front edge of, and centered on, the seat cushion. The devices shall be located 3 inches  $\pm$  0.5 in (7.5 cm  $\pm$  1.3 cm) above floor surface.

(2) — Knee Level Place a minimum of one measuring device at the height of the front top edge of the seat cushion and on the centerline of the seat. This measurement shall be 4 inches  $\pm$  1 inch (10 cm  $\pm$  2.5 cm) forward of the extreme front edge of the seat cushion and parallel to the floor.

(3) — Breath Level Place a minimum of one measuring device 42 inches  $\pm$  2 inches (107 cm  $\pm$  5 cm) above the floor and 10 inches  $\pm$  2 inches (25 cm  $\pm$  5 cm) forward of the seat back. The forward dimension shall be measured from the upper edge of the seat back and parallel to the floor.

**4.1.4 — (Optional) Heat Exchanger Inlet and Outlet Temperature** A minimum of four (4) electrically averaged temperature measuring devices shall be used to measure the inlet air temperature of each heat exchange unit. Additionally, a minimum of four (4) electronically averaged temperature measuring devices shall be used to measure the outlet air temperature of each heat exchange unit. These sensors shall be placed no closer than 2.0 inches (5.1 cm) from the face of any heater core, to prevent any incidence of radiant heat transfer. Outlet sensors shall be distributed throughout the outlet airstream(s)

1.0 inches  $\pm$  .25 inches (2.5 cm  $\pm$  .6 cm) from the outlet aperture(s) of the unit heater.

**4.1.5 — (Optional) Defrost Air Temperature** The temperature of the defrost air shall be measured at a point in the defroster outlet(s) that is in the main air flow and which is at least one (1) inch (2.54 cm) below the plane of the defroster outlet opening. At least one temperature measurement shall be made in each outlet unit. The interior surface temperature(s) of the windshield shall be measured at a point located on the vertical and horizontal centerline(s) of the windshield.

**4.1.6 — (Optional) Entrance Area Temperature** The temperature of the vehicle entrance area shall be measured by two (2) sets of three (3) each electrically averaged temperature measuring devices. One set of three (3) devices shall be placed one (1) inch (2.54 cm) above the lowest tread of the entrance step, equally spaced on the longitudinal centerline of the tread. The second set of devices shall be placed on the next horizontal surface above the lowest entrance step, four inches (10.2 cm) from the outboard edge of that surface, spaced



identically to the first set of sensors, and placed parallel with the outboard edge of the surface being measured.

**4.2 — Coolant Temperature** The temperature entering and leaving the heat-changer/defroster system shall be measured as close to the entrance and exit points of the bus body as possible with an immersion thermocouple or RTD device which can be read within  $\pm 0.5$  degrees Fahrenheit ( $\pm 0.3$  degrees Celsius).

**4.3 — Coolant Flow** The quantity of coolant flowing shall be measured by means of a calibrated flow meter or weighing tank to an accuracy of at least 2 percent of set point.

**4.4 — Coolant Pressure** The coolant differential pressure shall be measured by suitable connection as close as possible to the inlet and outlet of the heat exchanger/defrosting system. Pressure may be read as inlet and outlet pressure and the differential calculated, or read directly as PSID. Pressure readings shall be made with the use of gauges, manometers or transducers capable of reading within

$\pm$

0.1 psi (689.5 Pa), accurate to  $\pm 0.5\%$  of full scale.

**4.5 — Additional Instrumentation** Additional instrumentation required for vehicle heat exchanger system testing is a voltmeter and a shunt type ammeter to read the voltage and current of the complete system. The ammeter and voltmeter shall be capable of an accuracy of  $\pm 1$  percent of the reading.

## **5. — Test Procedures**

**5.1 — Install the heater test vehicle on the test site.** Testing shall be conducted in such a way as to prevent the effects of solar heating. At an outdoor test site, testing shall commence and data shall be recorded during the hours following sunset and prior to sunrise, regardless of cloud cover or facility roof.

Instrumentation is required to obtain the following readings:

- (a) — Vehicle interior (4.1.1);
- (b) — Inlet coolant temperature, at entrance to the bus body (4.2);
- (c) — Discharge coolant temperature, at exit from the bus body (4.2);
- (d) — Voltage and current at main bus bar connection of driver's control panel;
- (e) — Ambient temperature (4.1.2);
- (f) — Rate of coolant flow (4.3);
- (g) — Coolant flow pressure (4.4);
- (h) — Elapsed time (stop watch);
- (i) — Driver's station temperatures (4.1.3);
- (j) — (Optional) Heat Exchanger Inlet and Outlet Temperatures (4.1.4);
- (k) — (Optional) Defrost Air Temperature (4.1.5); and
- (l) — (Optional) Entrance Area Temperature (4.1.6).

Soak the test vehicle, with doors open, for the length of time necessary to stabilize the interior temperature for a 30 minute period as recorded by the vehicle interior temperature measuring devices, and the coolant temperature as measured by the inlet and outlet coolant temperature measuring devices, at the test site temperature,  $\pm 5$  degrees Fahrenheit ( $\pm 2.5$  degrees Celsius), not to exceed 25 degrees Fahrenheit ( $-3.9$  degrees Celsius). Warm up the coolant device to the test temperature immediately prior to the start of the test. Use the coolant supply outlet diverter valve to prevent heated coolant from entering the bus heating system prior to the start of the test. At this time, set the heater controls and all fan controls at maximum, close all doors. A maximum of two windows may be left open a total of one (1) inch (2.5 cm) each. A maximum of two occupants may be in the body during the test period. Record all instrumentation readings at five minute intervals for a period of one hour. Recording time shall begin with the initial introduction of heated coolant from the

independent coolant supply. The electrical system shall be operated at a maximum of 115% of nominal system voltage  $\pm 0.2$  volts, for example: 13.8 VDC  $\pm 0.2$  volts for a 12 VDC system, and the heat exchanger system shall be wired with the normal vehicle wiring.

~~Optional—Additional flow rates and/or coolant temperatures may also be used to generate supplementary data. Test procedure five (5) shall be repeated for each additional flow rate and/or coolant temperature.~~

## **6. Computations**

**6.1 Chart and Computations—Customary Units**—Data shall be recorded on Chart 6.1 or equivalent. Temperature data shall be recorded at the actual temperatures occurring at the time of testing. Air temperature data shall then be adjusted to a 0 degrees Fahrenheit base prior to the construction of graphs. This data reduction shall be directly proportional to the difference between the actual ambient temperature, at the time of test, and 0 degrees Fahrenheit (i.e., actual ambient of 18 degrees Fahrenheit shall result in a reduction of all air temperatures by 18 degrees Fahrenheit, actual ambient temperature of -8 degrees Fahrenheit shall result in an increase of all air temperatures by 8 degrees Fahrenheit). Temperature data shall be presented in graph form as well as tabular form. One graph shall be constructed for the body interior air temperatures (4.1.1) wherein the recording intervals shall be the X-axis and the degrees Fahrenheit shall be the Y-axis. A separate graph shall be constructed for the driver's temperatures (4.1.3) using the same units for the axes. Optional temperature data (4.1.4, 4.1.5, 4.1.6) may be similarly graphed separate from the interior data.

### **6.1.1 Optional Computations BTU/Hr. Coolant**

- (a) Flow of Coolant (Ww) lb./min measured to  $\pm 2$  percent.
- (b) Temperature of Coolant into System (T in) degrees Fahrenheit measured.
- (c) Temperature of Coolant out of System (T out) Fahrenheit measured.
- (d) Heat Removed From Coolant  
(Qw) Btu/h calculated:  $Qw = CpWw(T in - T out) \times 60$  Cp= Specific Heat of Coolant Given as  
 $0.85 \times 1.0018$   
Btu/lb./degrees Fahrenheit  
 $Ww = No. 1 \times T in - No. 2$   
 $T out = No. 3$

**6.2 Chart and Computations—Metric Units**—Data shall be recorded on Chart 6.2 or equivalent. Temperature data shall be recorded at the actual temperatures occurring at the time of testing. Air temperature data shall then be adjusted to a -18 degrees Celsius base prior to the construction of graphs. This data reduction shall be directly proportional to the difference between the actual ambient temperature, at the time of test, and -18 degrees Celsius i.e., actual ambient of -7.8 degrees Celsius shall result in a reduction of all air temperatures by 10.2 degrees Celsius, actual ambient temperature of -22.2 degrees Celsius shall result in an increase of all air temperatures by 4.2 degrees Celsius. Temperature data shall be presented in graph form as well as tabular form. One graph shall be constructed for the body interior air temperatures (4.1.1) wherein the recording intervals shall be the X-axis and degrees Celsius shall be the Y-axis. A separate graph shall be constructed for the driver's temperatures (4.1.3) using the same units for the axes. Optional temperature data (4.1.4, 4.1.5, 4.1.6) may be similarly graphed separate from the interior data.

### **6.2.1 Optional Computations BTU/Hr. Coolant**

- (a) Flow of Coolant (Ww) lb./min measured to +/- 2 percent.
- (b) Temperature of Coolant into System (T in) degrees Celsius measured.
- (c) Temperature of Coolant out of System (T out) Celsius measured.
- (d) Heat Removed From Coolant  

$$(Qw) \text{ Btu/h calculated: } Qw = CpWw(T \text{ in} - T \text{ out}) \times 60$$

$$Cp = \text{Specific Heat of Coolant Given as } (0.85 \times 4187j) \text{ (kg/c)}$$

$$Ww = \text{No. 1}$$

$$T \text{ in} =$$

$$\text{No. 2}$$

$$T \text{ out} =$$

$$\text{No. 3}$$

#### RESOURCE BACKGROUND—NASDPTS

#### NATIONAL ASSOCIATION OF STATE DIRECTORS OF PUPIL TRANSPORTATION

##### Background:

An estimated 23 million public school students ride over 400,000 school buses twice daily to go to and from school. Additionally, it has been estimated that another one to two million students ride school buses to and from school-related activities each day. In the course of a school year, school buses transport students over four billion miles. The safety of pupil transportation is of significant concern to Federal, State and local governments, school districts, school administrators, parents, and the general public.

Within the school transportation industry itself, there is a long history of significant efforts to make school transportation safe and efficient. Pupil transportation programs date back to the earliest years of the 20th century. By 1910, thirty states had pupil transportation programs in place. The first “vehicles” used to transport students were nothing more than horse-drawn carts which were borrowed from local farmers. With the development of automobiles and trucks with gasoline-powered engines, the school “wagon” was replaced with the school “truck.” During the 1920’s and 1930’s, the Nation’s roadway system was expanding, especially in rural communities. This led to a greater need for vehicles to transport schoolchildren and the formation of an industry of school bus manufacturers.

As the number of school buses operating on the roadways increased, there came the inevitable problems. Several serious tragedies occurred involving school buses which caused school officials to think seriously about developing safety guidelines for school buses. In 1939, representatives from 48 states gathered to develop recommendations for school buses. Since that time, there have been a total of 12 National Conferences on School Transportation where representatives from each state gather to revise existing and establish new safety guidelines for school buses and operating procedures for the safe transportation of schoolchildren, including those with disabilities. The product of these national conferences are referred to as the National Guidelines for School Transportation. The National Conferences are jointly sponsored by the National Association of State Directors of Pupil Transportation Services (which includes the School Bus Manufacturers Technical Council), the National Association for Pupil Transportation, and the National School Transportation Association, the National Safety Council, and Central Missouri State University.

To help ensure the transportation safety of students on school buses, the National Highway

Traffic Safety Administration (NHTSA) establishes and enforces a series of Federal Motor Vehicle Safety Standards governing the safety performance and manufacture of school buses. NHTSA also conducts a safety defects investigation program to identify safety defects in motor vehicles, including school buses, and requires manufacturers to recall and remedy defective vehicles free of charge. In addition, NHTSA's Guideline #17, "Pupil Transportation Safety," establishes minimum recommendations for a pupil transportation safety program, including the identification, operation, and maintenance of buses used for transporting students; training of passengers, pedestrians, and bicycle riders; and administration.

Even with the school bus-specific Federal Motor Vehicle Safety Standards, NHTSA's safety defect investigation and recall program, NHTSA's Guideline #17, and the school transportation industry's National Guidelines for School Transportation, a few school bus safety problems continue to persist.

One of these problems was identified as a contributing factor in a tragic crash that occurred on October 25, 1995, in Fox River Grove, Illinois. On that day, a commuter train hit a school bus that was stopped at a highway-railway grade crossing. Seven students were killed and the school bus driver and 24 other students were injured. The school bus driver had taken all of the appropriate actions prior to crossing the railroad tracks, but unknowingly failed to completely clear the railway track while the school bus was stopped at a red traffic light. The commuter train struck the rearmost side of the school bus.

At the conclusion of its investigation of the crash, the National Transportation Safety Board identified one of the factors contributing to the crash as an inadequate school district routing and hazard marking system. The Safety

Board noted that the substitute school bus driver operating the bus that day was unaware of the hazard at the highway-railroad crossing because "the methods employed by the school district to identify and evaluate route hazards were ineffective."

In addition to the Safety Board's investigation of the Fox River Grove crash, the U.S. Department of Transportation formed a Grade Crossing Task Force to review the decision-making process for designing, constructing, and operating rail crossings. The Task Force published its findings in a March 1996 report, "Accidents That Shouldn't Happen." One recommendation from that report calls for NHTSA to "work with State directors of pupil transportation, through relevant national organizations, to develop a system to improve school bus routing safety by focusing on highway-railroad grade crossings."

As a result of the recommendations from the Safety Board and the Grade Crossing Task Force, NHTSA provided a grant to the National Association of State Directors of Pupil Transportation to:

1. Research the issue of school bus route hazards and route hazard marking systems;
2. Develop a set of guidelines that school transportation officials could utilize in developing a system for identifying school bus route hazards that meets the needs of their locality;
3. Provide suggestions for reasonable and appropriate means of informing school bus drivers of potential school bus route hazards so as to educate them on how to deal with any route hazards that cannot be avoided; and
4. Suggest methods to disseminate the information developed during this project to the school transportation community.

## SCHOOL BUS HANDRAIL HANDBOOK & HANDRAIL INSPECTION TOOL AND PROCEDURE

Across the United States, children are being injured or killed when their clothing or accessories are caught in their school bus's handrail or door as they exit the school bus. As a result, they may fall and be violently dragged by the bus and run over by its rear wheels. The most common piece of clothing that can be snagged on the handrail is a jacket with a drawstring at the waist. These drawstrings commonly have a large bobble or knot at the ends that can become lodged in the handrail. However, other articles such as scarves, long straps on backpacks or dangling key chains can also be snagged on the handrail.

School bus handrails have had the same basic design for more than 30 years. However, with the current change in fashion toward oversized and baggy clothing, handrail designs have contributed to tragic and avoidable injuries and deaths.

School bus manufacturers have taken extraordinary and costly steps to remove snagging hazards from school bus entrances. More than 4000,000 school buses have been recalled and manufacturers have absorbed the cost of the repairs. In most cases, a simple spacer can be added to the existing handrail eliminating the potential for snagging. In other cases, manufacturers have redesigned the handrail.

## THE SCHOOL BUS DRIVER'S ROLE

The school bus driver is a trained professional concerned with getting children to school and returning them home safely. Driving a school bus is a demanding task. There is a lot of activity in and around the bus. The bus driver must be aware of ever-changing traffic conditions, the children on the bus, and the children who enter and exit at each school bus stop. Compounding this already complex situation is the need for the driver to maintain the school bus schedule.

The major reason for injury and death due to handrail snagging incidents is the driver's failure to notice that the child's drawstring has become snagged. The driver should observe all children, especially those with long drawstrings, oversized or baggy clothing, or other items that may become snagged in handrails, as they exit. Additionally, to ensure safety at each stop, the driver should be certain that each child has completely exited the bus and cleared the danger zones before closing the door and moving the vehicle. The driver should secure the bus and check around and underneath the bus if there is a question of whether a child has moved safely away from the bus. Finally, the driver must be alert for warnings as the bus pulls away. In many of the snagging incidents that have occurred to date, someone inside or outside the bus attempted to warn the driver that a child was being dragged by the bus.

## CHILDREN AND PARENT RESPONSIBILITIES

Children and parents must also accept some responsibility for ensuring that a snagging incident does not occur. While oversized and baggy clothing may represent the latest fashion trend, try to avoid choosing any article that may become caught in a school bus handrail or door. The consumer Product Safety Commission recommends that drawstrings be no more than three inches in length at the waist. Parents should caution children about attaching key rings and other items to their backpacks, as these too may become caught on the handrail or door.

While not directly related to snagging, children should also be warned to stay out of the school bus danger zones. The danger zones are areas around the bus where it is difficult for the driver to see. Children should be taught not to pick up objects they drop near the bus. The driver may not see the child.

---

If the child does drop something, the child should inform the bus driver and follow the driver's

instructions. Parents should check with the school principal, or local school bus transportation director to determine if the school bus carrying their children has been recalled for a handrail problem and, if so, whether it has been repaired. Parents are encouraged to check with the school system when their child's safety is in question.

Information compiled from [National Highway Traffic Safety Administration](#).

## **APPENDIX D • PUPIL TRANSPORTATION SAFETY**

National Highway Traffic Safety  
Administration Highway Safety  
Program Guideline #17

**I. Scope.** This guideline establishes minimum recommendations for a State Highway Safety Program for pupil transportation safety including the identification, operation and maintenance of buses used for carrying students; training of passengers, pedestrians and bicycle riders; and administration.

**II. Purpose.** The purpose of this guideline is to minimize, to the greatest extent possible, the danger of death or injury to school children while they are traveling to and from school and school-related events.

**III. Definitions.** "Bus" is a motor vehicle designed for carrying more than 10 persons (including the driver).

"Federal Motor Carrier Safety Regulations (FMCSR)" are the regulations of the Federal Motor Carrier Safety Administration (FMCSA) for commercial motor vehicles in interstate commerce, including buses with a gross vehicle weight rating (GVWR) greater than 10,000 pounds or designed to carry 16 or more persons (including the driver), other than buses used to transport school children from home to school and from school to home. (The FMCSR are set forth in 49 CFR Parts 383-399.)

"School chartered bus" is a "bus" that is operated under a short-term contract with state or school authorities who have acquired the exclusive use of the vehicle at a fixed charge to provide transportation for a group of students to a special school-related event.

"School bus" is a "bus" that is used for purposes that include carrying students to and from school or related events on a regular basis, but does not include a transit bus or a school-chartered bus.

### **IV. Pupil Transportation Safety Program Administration and Operations.**

Recommendation. Each state, in cooperation with its school districts and other political subdivisions, should have a comprehensive pupil transportation safety program to ensure that school buses and school chartered buses are operated and maintained so as to achieve the highest possible level of safety.

#### **A. Administration.**

1. There should be a single state agency having primary administrative responsibility for pupil transportation, and employing at least one full-time professional to carry out these responsibilities.
2. The responsible state agency should develop an operating system for collecting and reporting information needed to improve the safety of operating school buses and school-chartered buses. This includes the collection and evaluation of uniform crash data consistent with the criteria set forth in Highway Safety Program Guidelines No. 10, "Traffic Records" and No. 19, "Accident Investigation and Reporting."

#### **B. Identification and Equipment of School Buses.**

Each state should establish procedures to meet the following recommendations for identification and equipment of school buses.



1. All school buses should:
  - a. Be identified with the words "School Bus" printed in letters not less than eight inches high, located between the warning signal lamps as high as possible without impairing visibility of the lettering from both front and rear, and have no other lettering on the front or rear of the vehicle, except as required by Federal Motor Vehicle Safety Standards (FMVSS), 49 CFR Part 571.
  - b. Be painted National School Bus Yellow, in accordance with the colorimetric specification of National Institute of Standards and Technology (NIST) Federal Standard No. 595a, Color 13432, except that the hood should be either that color or lusterless black, matching NIST Federal Standard No. 595a, Color 37038.
  - c. Have bumpers of glossy black, matching NIST Federal Standard No. 595a, Color 17038, unless, for increased visibility, they are covered with a reflective material.
  - d. Be equipped with safety equipment for use in an emergency, including a charged fire extinguisher that is properly mounted near the driver's seat, with signs indicating the location of such equipment.
  - e. Be equipped with device(s) demonstrated to enhance the safe operation of school vehicles, such as a stop signal arm.
  - f. Be equipped with a system of signal lamps that conforms to the school bus requirements of FMVSS No. 108, 49 CFR 571.108.
  - g. Have a system of mirrors that conforms to the school bus requirements of FMVSS No. 111, 49 CFR 571.111, and provides the seated driver a view to the rear along both sides of the bus and a view of the front bumper and the area in front of the bus. Mirrors should be positioned and adjusted such that when a rod, 30 inches long, is placed upright on the ground at any point along a traverse line one foot forward of the forward most point of a school bus, at least seven 1/2 inches of the length of the rod should be visible to the driver, either by direct view or by the system of mirrors.
  - h. Comply with all FMVSS applicable to school buses at the time of their manufacture.
2. Any school bus meeting the identification recommendations of sections 1. a.-h. above, that is permanently converted for use wholly for purposes other than transporting children to and from school or school-related events, should be painted a color other than National School Bus Yellow, and should have the stop arms and school bus signal lamps described by sections 1. d. & e. removed.
3. School buses, while being operated on a public highway and transporting primarily passengers other than school children, should have the words "School Bus" covered, removed, or otherwise concealed, and the stop arm and signal lamps described by sections 1. e & f should not be operated.
4. School chartered buses should comply with all applicable FMCSR and FMVSS.

#### **G. Operations.**

Each state should establish procedures to meet the following recommendations for operating school buses and school-chartered buses:

1. Personnel.
  - a. Each State should develop a plan for selecting, training, and supervising persons whose primary duties involve transporting school children in order to ensure that such persons will attain a high degree of competence in, and knowledge of, their duties.

- b. ~~Every person who drives a school bus or school chartered bus occupied by school children should, as a minimum:~~
  - 1. ~~Have a valid state driver's license to operate such a vehicle. All drivers who operate a vehicle designed to carry 16 or more persons (including the driver) are required by FMCSA's Commercial Driver's License Standards by April 1, 1992 (49 CFR Part 383) to have a valid commercial driver's license.~~
  - 2. ~~Meet all physical, mental, moral and other requirements established by the state agency having primary responsibility for pupil transportation, including requirements for drug and/or alcohol misuse or abuse; and~~
  - 3. ~~Be qualified as a driver under the Federal Motor Carrier Safety regulations of the FMCSA, 49 CFR Part 391, if the driver or the drivers' employer is subject to those regulations.~~

2. ~~Vehicles:~~

- a. ~~Each state should enact legislation that provides for uniform procedures regarding school buses stopping on public highways for loading and discharge of children. Public information campaigns should be conducted on a regular basis to ensure that the driving public fully understands the implications of school bus warning signals and requirements to stop for school buses that are loading or discharging school children.~~
- b. ~~Each state should develop plans for minimizing highway use hazards to school bus and school chartered bus occupants, other highway users, pedestrians, bicycle riders and property. They should include, but not be limited to:~~
  - 1. ~~Careful planning and annual review of routes for safety hazards;~~
  - 2. ~~Planning routes to ensure maximum use of school buses and school chartered buses, and to ensure that passengers are not standing while these vehicles are in operation;~~
  - 3. ~~Providing loading and unloading zones off the main traveled part of highways, when it is practical to do so;~~
  - 4. ~~Establishing restricted loading and unloading areas for school buses and school chartered buses at or near schools;~~
  - 5. ~~Ensuring that school bus operators, when stopping on a highway to take on or discharge children, adhere to state regulations for loading and discharging including the use of signal lamps as specified in section B. 1. f. of this guideline;~~
  - 6. ~~Prohibiting, by legislation or regulation, operation of any school bus unless it meets the equipment and identification recommendations of this guideline;~~
  - 7. ~~Replacing, consistent with the economic realities which typically face school districts, those school buses which are not manufactured to meet the April 1, 1977 FMVSS for school buses, with those manufactured to meet the stricter school bus standards, and not chartering any pre-1977 school buses; and~~
  - 8. ~~Informing potential buyers of pre-1977 school buses that these buses may not meet current standards for newly manufactured buses and of the need for continued maintenance of these buses and adequate safety instruction.~~
- c. ~~Use of amber signal lamps to indicate that a school bus is preparing to stop to load or unload children is at the option of the state. Use of red warning signal lamps as specified in section B 1. of this guideline for any purpose or at any time other than when the school bus is stopped to load or discharge passengers should be prohibited.~~
- d. ~~When school buses are equipped with stop arms, such devices should be~~

~~operated only in conjunction with red warning signal lamps, when vehicles are stopped.~~

~~e. Seating~~

- ~~1. Standing while school buses and school chartered buses are in motion should not be permitted. Routing and seating plans should be coordinated so as to eliminate passengers standing when a school bus or school chartered bus is in motion.~~
- ~~2. Seating should be provided that will permit each occupant to sit in a seat intended by the vehicles' manufacturer to provide accommodation for a person at least as large as a 5th percentile adult female, as defined in 49 CFR 571.208. Due to the variation in sizes of children of different ages, states and school districts should exercise judgment in deciding how many students are actually transported in a school bus or school chartered bus.~~
- ~~3. There should be no auxiliary seating accommodations such as temporary or folding jump seats in school buses.~~
- ~~4. Drivers of school buses and school chartered buses shall be required to wear occupant restraints when the vehicle is in motion.~~
- ~~5. Passengers in school buses and school chartered buses with a gross vehicle weight rating (GVWR) of 10,000 pounds or less should be required to wear occupant restraints (where provided) when the vehicle is in motion. Occupant restraints should comply with the requirement of FMVSS Nos. 208, 209 and 210, as they apply to multipurpose vehicles.~~

~~f. Emergency exit access. Baggage and other items transported in the passenger compartment should be stored and secured so that the aisles are kept clear and the door(s) and emergency exit(s) remain unobstructed at all times. When school buses are equipped with interior luggage racks, the racks should be capable of retaining their contents in a crash or sudden driving maneuver.~~

**D. Vehicle Maintenance**

Each state should establish procedures to meet the following recommendations for maintaining buses used to carry school children

- ~~3. School buses should be maintained in safe operating condition through a systematic preventive maintenance program.~~
- ~~4. All school buses should be inspected at least semi-annually. In addition, school buses and school chartered buses subject to the Federal Motor Carrier Safety Regulations of FMCSA should be inspected and maintained in accordance with those regulations (49 CFR Parts 393 and 396).~~
- ~~5. School bus drivers should be required to perform daily pre-trip inspections of their vehicles, and the safety equipment thereon (especially fire extinguishers), and to report promptly and in writing any problems discovered that may affect the safety of the vehicle's operation or result in its technician breakdown. Pre-trip inspection and condition reports for school buses and school chartered buses subject to the Federal Motor Carrier Safety Regulations of FMCSA should be performed in accordance with those regulations (49 CFR 392.7, 392.8, and 396).~~

**E. Other Aspects of Student Transportation Safety.**

- ~~6. At least once during each school semester, each pupil transported from home to school in a school bus should be instructed in safe riding practices, proper loading and unloading techniques, proper street crossing to and from school bus stops and should participate in supervised emergency evacuation drills, which are timed. Prior to each departure, each pupil transported to an activity or field trip in a school bus or school~~

~~chartered bus should be instructed in safe riding practices and on the location and operation of emergency exits.~~

- ~~7. Parents and school officials should work together to select and designate the safety pedestrian and bicycle routes for the use of school children.~~
- ~~8. All school children should be instructed in safe transportation practices for walking to and from school. For those children who routinely walk to school, training should include preselected routes and the importance of adhering to those routes.~~
- ~~9. Children riding bicycles to and from school should receive bicycle safety education, wear bicycle safety helmets, and not deviate from preselected routes.~~
- ~~10. Local school officials and law enforcement personnel should work together to establish crossing guard programs.~~
- ~~11. Local school officials should investigate programs which incorporate the practice of escorting students across streets and highways when they leave school buses. These programs may include the use of school safety patrols or adult attendants.~~
- ~~12. Local school officials should establish passenger vehicle loading and unloading points at schools that are separate from the school bus loading zones.~~

#### **F. Program evaluation**

The pupil transportation safety program should be evaluated at least annually by the state agency having primary administrative responsibility for pupil transportation.

*Full document is located at [National Highway Traffic Safety Administration](#)*

### **APPENDIX E • HUMAN RESOURCES REFERENCES**

#### **SAMPLE JOB DESCRIPTIONS**

##### **Local Student Transportation Director, Manager, Supervisor and Private Operator**

- A. The local student transportation director's and private operator's specific duties should include, but are not limited to, the following activities:
  - ~~1. Providing assistance in planning, budgeting and forecasting for the student transportation system.~~
  - ~~2. Assisting in school site selection and facility planning.~~
  - ~~3. Providing, when appropriate, chassis, body and related equipment procurement.~~
  - ~~4. Developing and implementing a plan for preventive and on-going equipment maintenance.~~
  - ~~5. Recruiting, selecting, instructing, evaluating and supervising personnel.~~
  - ~~6. Routing and scheduling buses for safe, efficient and economical transportation service.~~
  - ~~7. Assisting in the development and implementation of student safety education programs.~~
  - ~~8. Working with administrators, teachers, transportation personnel, students, parents and various public and private agencies to improve their knowledge and the quality of the transportation system.~~
  - ~~9. Investigating and reporting crashes and safety-related incidents, when applicable, using the uniform school bus crash reporting criteria and standard safety incident investigation process.~~
  - ~~10. Investigating reported problems.~~
  - ~~11. Maintaining records and preparing reports, as required.~~
  - ~~12. Developing and supervising an on-going evaluation plan for the student transportation system.~~
  - ~~13. Implementing a drug/alcohol testing program in compliance with federal regulations for persons in safety-sensitive positions and for commercially licensed drivers.~~
  - ~~14. Establishing and ensuring appropriate staffing levels.~~
  - ~~15. Recommending vehicle and equipment replacement schedules.~~

- ~~16. Exhibiting effective skills in conflict resolution and problem solving.~~
- ~~B. Minimum qualifications for the student transportation director and private operator who supervise transportation should include the following:~~
  - ~~1. An undergraduate degree, equivalent experience or industry certification in one or more of the following fields of study is desirable:~~
  - ~~2. Education;~~
  - ~~3. Business Administration;~~
  - ~~4. Management; and~~
  - ~~5. Transportation or a related field.~~
  - ~~6. Formal instruction in student transportation management, including classroom instruction and field experience or student transportation industry certification.~~
  - ~~7. A basic understanding of the educational process and the corresponding role of transportation.~~
  - ~~8. The ability to manage personnel and resources.~~
  - ~~9. Basic user-level computer competency with accounting and word processing software and knowledge of web-based information systems.~~
  - ~~10. The ability to communicate effectively with school or Head Start Center administrators, teachers, parents, students, bus drivers, law enforcement officials, etc.~~
  - ~~11. Knowledge of state and federal regulations applicable to transportation of students.~~

#### **Transportation Specialist**

- ~~A. The specific duties should include, but are not limited to, the following activities:~~
  - ~~1. Design and regularly update all routes and time schedules.~~
  - ~~2. Assign drivers to routes and extracurricular trips.~~
  - ~~3. Prepare routes for bidding (if applicable), including schools served and time expectations.~~
  - ~~4. Assign substitute drivers.~~
  - ~~5. Accept bus trouble calls, coordinate replacement buses and drivers.~~
  - ~~6. Advise building officials and parents of route changes, bus changes, late arrivals and departures.~~
  - ~~7. Prepare annual route schedule for distribution and notification to schools and parents.~~
  - ~~8. Assist in planning and presenting staff development programs and annual in-service for drivers.~~
  - ~~9. Assist district in designing new school service areas and boundaries, when necessary.~~
  - ~~10. Assist with road checking all drivers annually.~~
  - ~~11. Relief drive, when necessary.~~
  - ~~12. Investigate school bus crashes, unsafe practices and safety-related incidents and recommend system and procedural improvements leading to improved safety of operations.~~
- ~~B. Minimum qualifications should include, but are not limited to:~~
  - ~~1. Certified state driver instructor (if applicable).~~
  - ~~2. Two years of college, equivalent experience or industry certification.~~
  - ~~3. Basic computer skills, routing software knowledge preferred.~~
  - ~~4. Minimum of one year of experience in an office setting.~~
  - ~~5. Knowledge of district, state and federal regulations, policies and requirements pertaining to driver training and student safety.~~
  - ~~6. Ability to plan, schedule, evaluate and dispatch buses for all district bus routes and extra-curricular trips.~~

- ~~7. Ability to recommend, train and evaluate drivers, meeting all district, state and federal requirements.~~
- ~~8. Ability to recommend equipment and personnel requirements for transportation.~~
- ~~9. Ability to effectively work with and direct bus drivers.~~
- ~~10. Ability to maintain cooperative and effective communication with administrators, students, parents, public and other department employees.~~
- ~~11. Familiarity with vehicle maintenance concepts.~~
- ~~12. Ability to read and interpret road maps.~~
- ~~13. Ability to communicate on the district's two-way voice communications system.~~

### **Dispatcher**

- ~~A. The specific duties should include, but are not limited to, the following activities:~~
  - ~~1. Schedule and dispatch buses and district vehicles to appropriate routes.~~
  - ~~2. Dispatch and coordinate bus and driver assignments for school-sponsored trips.~~
  - ~~3. Secure substitute drivers due to absences and review routes with substitutes, as necessary.~~
  - ~~4. Communicate with drivers via the transportation communications system regarding routes, emergencies and student problems.~~
  - ~~5. Develop and maintain records for driver assignments and vehicle scheduling and use.~~
  - ~~6. Receive and respond to phone calls from parents or public concerning transportation by providing information or referring call to appropriate staff members.~~
  - ~~7. Assist in development of bus routes, schedules and updating routes and schedules throughout the school year.~~
  - ~~8. Assist staff by checking roads during inclement weather.~~
- ~~B. Minimum qualifications should include, but are not limited to:~~
  - ~~1. High school graduate or equivalent.~~
  - ~~2. Class "B" CDL with P and S endorsements.~~
  - ~~3. Two years of experience in public or student transportation.~~
  - ~~4. Experience as a route planner or dispatcher.~~
  - ~~5. Effective oral and written communications skills.~~
  - ~~6. Ability to work effectively under pressure.~~
  - ~~7. Ability to make independent decisions.~~
  - ~~8. Ability to maintain accurate records.~~
  - ~~9. Ability to maintain confidentiality.~~
  - ~~10. Ability to operate communications system.~~
  - ~~11. Ability to schedule and coordinate activities.~~
  - ~~12. Ability to communicate and work effectively with building and department personnel.~~
  - ~~13. Knowledge of student transportation rules and regulations.~~

### **Instructor/Trainer**

- ~~A. The specific duties should include, but are not limited to, the following activities:~~
  - ~~1. Assist with pre-interview and recommend to train.~~
  - ~~2. Train and retrain, as necessary, all bus drivers and bus attendants.~~
  - ~~3. Organize and present safety messages and programs to students.~~
  - ~~4. Annually evaluate, on the road, all bus drivers.~~
  - ~~5. Maintain all driver records and notify drivers of license or certification expirations.~~
  - ~~6. Recommend hiring, retraining and disciplinary action for bus drivers and bus attendants.~~
  - ~~7. Work with vehicle maintenance personnel on possible driver training to avoid equipment abuse.~~
- ~~B. Minimum qualifications should include, but are not limited to:~~
  - ~~1. High school graduate or~~



equivalent.

2. Class "B" CDL with P and S endorsements.
3. Certified state driver instructor (if applicable).
4. Certified first aid instructor.
5. Knowledge of state and federal laws and regulations related to bus drivers.
6. Skill in operating a bus and troubleshooting minor problems.
7. Ability to teach required subjects to obtain state school bus driver's authorization.
8. Ability to instruct CDL requirements.
9. Ability to provide effective instruction in soft skills categories (i.e., confidentiality and intervention strategies).
10. Ability to effectively communicate with staff, peers and community.
11. Ability to establish and maintain effective working relationships.
12. Evidence of effective oral and written communications.
13. Proficiency in basic computer and presentation skills.

### **Routing Specialist**

A. The specific duties should include, but are not limited to, the following activities:

1. Coordinate the development and maintenance of bus stops, runs, routes and schedules consistent with district policies and state requirements.
2. Gather criteria necessary for the development of the school district's school boundaries, street address ranges, speed limits, one-way streets, traffic hazards and hazardous walkway areas.
3. Review all bus route change requests.
4. Communicate with drivers and dispatchers to resolve problems with routes.
5. Communicate with parents, teachers, principals and others regarding the transportation of students.
6. Generate transportation-related reports, as required by the Transportation Director.
7. Evaluate existing hazardous walkway areas and determine route revisions, making recommendations to appropriate individuals.

B. Minimum qualifications should include, but are not limited to:

1. High school graduate or equivalent.
2. Three years of computer routing experience.
3. Knowledge of operating procedures for student transportation.
4. Knowledge of routing procedures and methods.
5. Ability to analyze and make recommendations regarding bus routing activities.
6. Ability to work under pressure.
7. Ability to organize, set priorities and meet deadlines.
8. Ability to maintain accurate records and generate computerized reports.
9. Ability to establish and maintain effective working relationships with a variety of people.
10. Ability to establish a customer service environment.
11. Working knowledge of computer routing systems and boundary analysis software applications.

### **Secretary**

A. The specific duties should include, but are not limited to, the following activities:

1. Develop and maintain filing and record-keeping systems, both physical and electronic.
2. Finalize correspondence and reports prepared by others. Prepare correspondence, reports and other documents, as directed. Perform data entry of pertinent information.
3. Design, format and prepare forms and other documents.

4. ~~Ensure that documents are free from typographical errors, misspellings, omissions, logical inconsistencies and grammatical errors.~~
5. ~~Ensure that sufficient levels of office supplies are maintained.~~
6. ~~Arrange for meeting space, send notices and track responses, ensure appropriate refreshments are available and rooms and equipment are properly set up.~~
7. ~~Use standard office equipment.~~
8. ~~Coordinate activities with other clerical staff, departments and outside agencies.~~
- B. ~~Report employees' hours of work, sick leave, vacation and other leaves to payroll, per district policy and procedures.~~
  1. ~~Maintain permanent employee records, including payroll, evaluations and leaves, per district policy and procedures.~~
  2. ~~Answer phones while maintaining professional demeanor and answering queries or redirecting caller to the appropriate personnel.~~
  3. ~~Facilitate purchase of equipment by obtaining quotes, and preparing purchase orders. (This often is the duty of the Purchasing Agent.)~~
  4. ~~Ensure that all financial transactions are properly recorded, totaled, balanced and reconciled with budget. (This often is the duty of the Bookkeeper.)~~
- C. ~~Minimum qualifications should include, but are not limited to:~~
  1. ~~High school graduate or equivalent.~~
  2. ~~Computer experience in word processing, database, spreadsheet and desktop publishing.~~
  3. ~~Two years' secretarial experience in an office setting.~~
  4. ~~Ability to create and maintain a filing system.~~
  5. ~~Ability to enter data.~~
  6. ~~Ability to create forms, documents, and pamphlets, using desktop publishing.~~
  7. ~~Ability to maintain good telephone skills.~~
  8. ~~Good organizational and time management skills.~~
  9. ~~Excellent oral and written skills.~~
  10. ~~Ability to handle changing priorities.~~
  11. ~~Knowledge of payroll practices and procedures.~~
  12. ~~Knowledge of general accounting and purchasing procedures.~~
  13. ~~Ability to work effectively under high stress situations.~~
  14. ~~Ability to maintain confidentiality.~~

### **Bookkeeper**

- A. ~~The specific duties should include, but are not limited to, the following activities:~~
  1. ~~Develop and maintain records of budget data, both physical and electronic.~~
  2. ~~Prepare special reports, as required by the Transportation Director.~~
  3. ~~Prepare purchase orders and maintain records.~~
  4. ~~Ensure that all financial transactions are properly recorded, totaled, balanced and reconciled with budgeted amounts.~~
  5. ~~Invoice departments, schools and other agencies for transportation services performed.~~
  6. ~~Obtain quotes and prepare purchase orders for buses, supplies, office and shop equipment.~~
  7. ~~Maintain inventory of all buses and district vehicles, including VIN and license numbers, model, chassis, seat and vehicle-rated capacity, wheelchairs and occupant restraint systems.~~
  8. ~~Remove and add vehicles for insurance purposes.~~
  9. ~~Assist with insurance claims and warranty work.~~
  10. ~~Assist with development of annual budget.~~
  11. ~~Assist with answering phones while maintaining professional demeanor and answering queries or redirecting caller to the~~

appropriate personnel.

12. Use copiers and other office equipment.

B. Minimum qualifications should include, but are not limited to:

1. High school graduate or equivalent.

2. Experience with word processing, spreadsheets and database.

3. Experience as bookkeeper in an office setting.

4. Ability to organize tasks and documents in a logical manner.

5. Ability to complete basic formulas and operations, such as sorting and extracting.

6. Ability to operate a ten-key calculator.

7. Ability to use various types of office equipment.

8. Ability to reconcile checking accounts or bank statements.

9. Ability to maintain good telephone skills.

10. Ability to enter data.

11. Knowledge of general mathematics applications.

12. Knowledge of general accounting procedures.

13. Knowledge of purchasing regulations.

14. Knowledge of bidding and/or low quote purchase of school buses.

15. Ability to maintain confidentiality.

### **Bus Driver**

A. The specific duties should include, but are not limited to, the following activities:

1. Report defective school bus equipment and accessories, including but not limited to, fire extinguishers, highway warning kits, first aid and body fluid cleanup kits, snow chains, sanders, etc., and when necessary install, service or replace defective equipment.

2. Perform required operational and safety inspections of the school bus and all related equipment.

3. Ability to clean and service the school bus to include interior cleaning and exterior bus washing, installation of fuel, oil and other fluids, as directed.

4. Operate all hand and foot controls installed in a school bus, as required.

5. Perform basic first aid, as appropriate, which may include CPR.

6. Work effectively with a group of students of different grade levels, abilities or program placement.

7. Complete legibly and accurately forms, records, reports and other documentation/data logging activities, as required by state or district policy.

8. Be punctual.

9. Dress appropriately and wear proper foot protection.

10. Manage passengers in the school bus.

11. Report unsafe acts or conditions that require the attention of any person other than the driver.

12. Successfully complete school bus driver training programs and courses established by the state or district.

B. Minimum qualifications should include, but are not limited to:

1. High school graduate or equivalent.

2. Hold and maintain a class license with all applicable endorsement for the type of vehicle being driven.

3. Excellent driving record.

4. Physical ability to drive and perform all duties related to school bus operations.

5. Ability to relate effectively with parents, staff and public in a

multicultural and multiracial community.

6. ~~Sufficient command of local language to communicate with students, parents, district staff members and other concerned individuals regarding all aspects of their job-related activities.~~
7. ~~Ability to pass a criminal history background check.~~
8. ~~Ability to pass a state or DOT medical examination.~~
9. ~~Ability to pass a federally mandated drug/alcohol screen.~~

#### **Bus Attendant (Monitor or Aide)**

A. ~~The specific duties should include, but are not limited to, the following activities:~~

1. ~~Assist the school bus driver.~~
2. ~~Assist students to safely embark and disembark from a school bus.~~
3. ~~Ensure a safe trip for every student.~~
4. ~~Make sure that students get off at the correct busstop.~~
5. ~~Help implement safety standards on board the bus.~~
6. ~~When applicable, assist with loading/unloading and securing of assistive devices and safety restraints.~~
7. ~~Assist driver with student management.~~

B. ~~Minimum qualifications should include, but are not limited to:~~

1. ~~High school graduate or equivalent.~~
2. ~~Ability to work with all students.~~
3. ~~Ability to physically move wheelchairs onto wheelchair ramp and into the bus.~~
4. ~~Ability to physically remove students from a disabled bus.~~
5. ~~Ability to get along with co-workers, parents, students and other staff.~~
6. ~~Ability to interact with students.~~
7. ~~Ability to follow directions.~~
8. ~~Ability to communicate with staff.~~

#### **Vehicle Maintenance Supervisor, Foreman and Manager**

A. ~~The specific duties should include, but are not limited to, the following activities:~~

1. ~~Supervise and work with technicians in diagnosing malfunctions on vehicles.~~
2. ~~Supervise and work with technicians to overhaul and rebuild engines, transmissions and other vehicle components.~~
3. ~~Purchase parts, materials and supplies required for proper maintenance of district vehicles, related equipment and shop facilities, per district procedures.~~
4. ~~Coordinate maintenance of buses with dispatchers to ensure the bus fleet is ready to meet operational requirements.~~
5. ~~Recommend and assist with short and long term bus purchase planning.~~
6. ~~Oversee record keeping, evaluate reports for work assignments, inspect work, as needed, review time and parts used for repair and maintain inventory at required levels.~~
7. ~~Evaluate needs and recommend purchase of new or replacement shop equipment, machines, tools and related items.~~
8. ~~Assist in evaluating bids and recommend awards for jobs performed by outside vendors.~~
9. ~~Assume responsibility for cleanliness, upkeep and organization of shop building, as well as safety, security, equipment and parts.~~
10. ~~Assume responsibility for hazardous material disposal, following all governmental regulations and required reporting and record keeping~~
11. ~~Assume responsibility for evaluating all shop personnel.~~

12. Prepare and maintain preventive maintenance schedules.
- B. Minimum qualifications should include, but are not limited to:
  1. High school graduate or equivalent.
  2. Minimum of five years of experience in automotive technician field.
  3. One year of full-time experience as a journeyman technician in a truck or bus maintenance facility.
  4. One year of full-time experience at the supervisory level in an automotive maintenance facility.
  5. Class "B" CDL with P and S endorsements.
  6. Knowledgeable user of computer-based business and fleet management software.
  7. Ability to direct and coordinate employees.
  8. Ability to communicate with staff.
  9. Ability to understand job functions in relationship to school district requirements.
  10. Ability to work under pressure.
  11. Ability to teach/instruct.
  12. Ability to maintain and analyze vehicle records.
  13. Ability to use and understand diagnostic equipment.

#### **Journeyman Technician**

- A. The specific duties should include, but are not limited to, the following activities:
  1. Diagnose and repair mechanical, electrical and engine defects in buses and other automotive equipment.
  2. Overhaul and rebuild engines, transmissions, differentials, brake systems and other major components by repair and replacement of parts.
  3. Repair and rebuild generators, alternators and all other electrical components utilizing testing devices and machine equipment, as required.
  4. Perform general tune-ups, utilizing diagnostic equipment.
  5. Make roadside repairs, as required.
  6. Repair and replace seats, glass, sheet metal, latches and other body components and assemblies.
  7. Change oil and filters; install antifreeze and snow chains; repair tires; adjust brakes; lubricate chassis, wheel bearings and other assemblies, as required.
  8. Perform all required preventive maintenance and regular bus safety inspections.
  9. Operate battery chargers, valve re-facing and reseating machines, compression gauges, torque wrenches, welding equipment, grinders, reamers, timing lamps, hoists, jacks, presses, headlight adjustment machines, air wrenches, small lathes, spark plug testers and other equipment for performing repair and maintenance of motor vehicles.
  10. Assist in cleaning and organizing the shop, parts room and other maintenance facilities.
  11. Complete vehicle maintenance forms and records.
- B. Minimum qualifications should include, but are not limited to:
  1. High school graduate or equivalent.
  2. Class "B" CDL with P and S endorsements.
  3. Completion of a recognized apprenticeship as an automotive technician, full journeyman status as an automotive technician or a minimum of four years' applicable work experience of any equivalent combination of experience and training.
  4. Experience in repair and maintenance of heavy duty and diesel vehicles and special vehicular equipment.
  5. Ability to identify, diagnose and repair vehicle malfunctions.
  6. Ability to communicate with staff, peers and students.
  7. Ability to understand job functions in relationship to school district needs.
  8. Ability to work under pressure.

9. ~~Ability to maintain accurate bus repair and other records.~~
10. ~~Be in good physical condition.~~

#### **Assistant Technician**

- A. ~~The specific duties should include, but are not limited to, the following activities:~~
  1. ~~Assist journeyman technicians in overhaul, rebuilding and replacing major assemblies and components.~~
  2. ~~Lubricate buses and other automotive equipment to include chassis lube, oil and filter changes, gearbox fill or drain and flush, wheel bearing pack and all other lubricating and air cleaner service procedures, as required.~~
  3. ~~Verify operational safety of equipment and devices, such as brakes, clutch, lamps, mirrors, glass, fire extinguishers, first aid kits, highway warning kits, horn, warning lamps and buzzers, emergency exits, wipers, signs, tires, etc.~~
  4. ~~Change and repair tires, perform complete battery service and brake adjustments.~~
  5. ~~Install antifreeze; service cooling systems; inspect and replace hoses, caps valves etc.~~
  6. ~~Make minor repairs by replacing lamps, spark plugs, ignition parts, patches and switches, as required.~~
  7. ~~Operate lubrication equipment, hoist, compressor, battery charger, diagnostic equipment, headlight adjustment machine, alignment board, spark plug tester, drills, presses, air wrenches and other tools and equipment, as required in the performance of assigned duties.~~
  8. ~~Drive service truck for roadside service, as required.~~
  9. ~~Assist in cleaning and organizing the shop, parts room and other maintenance facilities.~~
- B. ~~Minimum qualifications should include, but are not limited to:~~
  1. ~~High school graduate or equivalent.~~
  2. ~~Class "B" CDL with P and S endorsements.~~
  3. ~~Minimum two years of general experience in service station type automotive maintenance, plus one year related experience on buses, trucks or other heavy-duty vehicular equipment.~~
  4. ~~Possess a basic set of auto technician hand tools and storage cabinet, if required.~~
  5. ~~Be in good physical condition.~~
  6. ~~Ability to work under pressure.~~
  7. ~~Able to follow directions.~~
  8. ~~Ability to communicate with staff.~~

#### **HIRING NEW EMPLOYEES**

~~Employment procedures should be clearly stated in writing and followed by all parties involved in the procedures. There should be no discrimination in the advertisement of a job opening, in the application review process or in the interview. All applicants must be treated equally and interviewed/not interviewed or hired/not hired based on objective and measurable criteria. It is illegal to make any inquiry or keep any record of race, creed, color, national origin, age, sex, marital status or disability before, during or after employment for the purpose of discriminating on these grounds.~~

~~It is the local school district board of trustees or a school bus contractor's responsibility to employ and dismiss employees, including school district school bus drivers. See 20-3-324(1)-(2), MCA.~~

~~The following are essential steps to be incorporated in screening and hiring procedures:~~

1. ~~Advertising~~
  - a. ~~Contact the Personnel Department/Human Resources Office for possible~~



applications on file. (Some offices have a phone job line available for posting job openings.) Advertising by word of mouth, newspapers, employment office, school lunch menus and notices in retail stores or local fire departments are also good methods to get word out to the community regarding job openings.

- b. Provide written procedures, job requirements and duties to applicants. Pre-employment screening requirements (e.g., criminal background checks, driving record checks, drug screening, etc.) should be listed in each packet of information provided to potential applicants.

## 2. Applicant screening

- a. Check application forms for completeness. Contact applicants as soon as possible to obtain any information that was omitted from the original application documents. One method is to formulate a check-off list to verify the completeness of the applications and that the applicants meet all requirements for the position. A point system or some other grading criteria should be developed that will result in an objectively obtained score. It is advisable for the Personnel Department/Human Resources Office to keep these screening sheets on file, should the district be challenged by an applicant that feels he/she has been discriminated against. The successful applicants should be scheduled for an interview when screening and background checks are completed. This may be done by phone or letter.
- b. Conduct background checks, as may be required. Advise applicants of procedures for fingerprinting for criminal records checks, authorization for driving records check, drug/alcohol screening and any other background checks that are required. Obtain written authorization for any such checks. If a CDL is required prior to employment, a copy of the applicant's current license and physical examination form may be requested at this stage in the procedure.
- c. Contact personal references and previous employers listed on application forms. It is very important to check references; however, because personnel issues are confidential, it is very important to receive written permission from the applicant to allow the former employer(s) to release all information, including any available drug and alcohol test results. If you do not have this release, the only information you will usually obtain is date(s) of employment and position held. One question they may answer is this: "Would you rehire?" If the answer is "No," you may want to more thoroughly evaluate the applicant.
- d. Determine amount of pre-service training required for applicants to fulfill job requirements.

## 3. Interview

- a. Planning the interview. Interviews should be held in a pre-determined, pre-appointed setting. The interview team should be selected, seating arrangements determined and questions prepared before the interview begins. Applicants should not have to wait. It is very important to plan the number of questions to be asked and about how long the interview should take. Allow time in the schedule for the interview team to exchange any thoughts or concerns about the applicants while information is fresh.
- b. Interview questions
  - i. Questions should be open-ended. Try to avoid asking questions that can be answered with a "yes" or "no." The number of questions depends on the kind of information the interview team wishes to

gather and evaluate. Always allow the applicant to ask the team any questions he/she may have. "Look for" answers, pre-determined by human resources staff and/or the interview team, must be resolved before the interview. The answer(s) are what the team is "looking for" when the applicant is interviewed. Each member of the team would then grade the answer he/she hears on a pre-designed sliding scale.

ii. Do not ask illegal questions. The perception by the candidate could be that he or she was not picked because of the answer of an illegal/personal question.

c. The interview team should meet in advance to determine assignments and to stress that all candidates for the position must be treated equally and asked the same questions, preferably by the same interview team member.

d. Concluding interview activities. After all interviews are completed, interview team members should grade their interview sheets. (These must be kept in the event the district may be challenged about the decision by an unsuccessful applicant at a later date.) Applicants' composite scores should be tallied and recommendations prepared.

4. Recommend hiring

Applicants for all positions must be screened, and only those applicants that qualify in terms of education, job skills and experience should be recommended for final consideration.

5. Hire

Hiring an employee is a process with many steps that usually begins with the need to fill an open or new position. Hiring, the final step, should follow a clearly established written procedure, which often must be ratified by the governing authority of the agency involved.

## **APPENDIX F – SUPPLEMENTAL RESOURCE MATERIALS**

### **RESOURCE – BUS ROUTE ACTIONS**

#### **ACTIONS TO BE TAKEN DURING AND FOLLOWING THE OBSERVATIONS OF SCHOOL BUS ROUTES**

Supervisory actions that should be taken during and after the transportation director completes a review of bus routes are listed below:

1. Check the route and schedule for accuracy.
2. Determine that loading and unloading occurs only at authorized stops.
3. Check for bus stop hazards
4. Check to see that vehicles are operated in compliance with prescribed regulations.
5. Observe the driver-student relationship.
6. Check loading and unloading conditions at school centers.
7. Check for evidence of supervision in loading zones.
8. Note hazardous road conditions.
9. Note the nature, frequency and locations of bus stop law violations.
10. Observe conditions of bus (e.g., cleanliness, tires, windows, emergency exit(s), first-aid kits, fire extinguisher, seats, etc.).
11. Observe vehicle inspection guide for evidence of pre-trip inspection.
12. Note driver attitude toward other motorists and pedestrians.
13. Follow the observation with a written report and discussion with the driver (and others, as appropriate). The discussion should be used to encourage the driver to become self-auditing and participate in giving supervisors information that is helpful in improving the overall safety, effectiveness and efficiency of the student transportation system.
14. File the written report in the driver's permanent record.

## RESOURCE—NASDPTS GUIDELINES FOR ENROUTE EMERGENCY BUS EVACUATION

The intent of these procedures is to provide guidelines for evacuating a bus only when necessary in an emergency, for the safety of students and staff.

### I.——Preparing an Emergency Evacuation Plan:

Each bus should have an emergency evacuation plan, which should be kept in the bus. The plan should allow for individual capabilities and needs of each student, the type of behaviors that might be exhibited during an emergency evacuation and the types of wheelchair or support equipment being used for students. A floor plan with student location and special needs should be in the bus. Issues that should be considered when establishing an evacuation plan are listed below:

- a.——Whether students can help, and to what extent;
- b.——How to deal with individual emergencies (e.g., seizures) during the evacuation process;
- c.——Whether students should be evacuated in their wheelchairs, or removed from their wheelchairs before evacuation;
- d.——How to disconnect or cut wheelchair securement and occupant protection equipment, including belts, trays and other support equipment;
- e.——The order or sequence in which students should be evacuated;
- f.——The length of time a student requiring life support equipment or medical care procedures can survive if such service is interrupted or delayed during the evacuation process;
- g.——Where to gather once off the bus and how to evaluate different scenarios to make the best decision about where to gather;
- h.——Training plan and schedules for drivers and students; and
- i.——Specific emergency equipment needed, training in use and assignment of responsibility to remove from the bus when evacuations occur.

### II.——Assessing the Need to Evacuate:

Student safety and control are best maintained by keeping students in the bus during an emergency and/or impending crisis if doing so does not expose them to unnecessary risk or injury. A decision to evacuate should include consideration of the following conditions:

- a.——Is there a fire involved?
- b.——Is fuel leaking?
- c.——Might the bus roll or tip, thereby causing further threat to safety?
- d.——Is the bus likely to be hit by other vehicles?
- e.——Is the bus in the direct path of a sighted tornado or other natural disaster, such as rising water?
- f.——Would evacuating students expose them to speeding traffic, severe weather or another dangerous environment?
- g.——Considering the medical, physical and emotional condition of the students, does staying in the bus or evacuating pose the greater danger to the students' safety?

### III.——General Procedures to Follow for Emergency Evacuation:

- a.——Keep the situation as orderly and low-key as possible.
- b.——If time and conditions permit, the bus driver should use the communication system to advise the office of the following information:
  1. The exact location, including nearest intersecting road or familiar landmark;
  2. The condition creating the emergency;
  3. The type of assistance needed (police fire ambulance); and
  4. Notification that the bus is being evacuated.
- c.——Analyze conditions to determine the safest exit from the bus and safest gathering location;
- d.——During evacuation, monitor conditions and adjust procedures to meet unexpected circumstances.

- e. Move evacuated students to the nearest safe location at least 100 feet from the bus.
- f. Be prepared to give information to emergency medical personnel regarding individual students' medical or physical requirements.

#### IV. Equipment Considerations:

- a. Bus staff should, as part of their pre-trip inspection, familiarize themselves with the location and method of opening all emergency exits.
- b. If time permits, a lift platform can be lowered half the distance to the ground, providing a step for evacuating wheelchairs. If there is a smell of spilled fuel, the lift should be operated manually.
- c. When re-entry to the bus is not probable, communication equipment and first aid kits can frequently be passed through a window, making them accessible outside the bus. Consideration should also be made for student medication, if carried and needed.
- d. If a large bus is being used and evacuation is made through the rear exit door, consideration should be given to the method to be used for re-entry to the bus, if necessary, considering the height of the floor from the ground. Some states allow a stirrup-type step on the rear bumper.
- e. If a battering ram is needed, a fire extinguisher can often serve that purpose.
- f. A belt cutter shall be stored in the bus in a location readily accessible to the driver when he/she is seated in the normal driving position and location. The cutter should have a protected mouth to restrict the entry of fingers, etc.

#### V. Local District Policy:

Bus staff should be familiar with local district policy regarding the following items:

- a. Evacuation procedures to follow when students are en route; or, what to do if a tornado or flash flood, etc. is sighted and no shelter is near.
- b. The type of medical information to be available on long distance trips in case of student injury.

**Note: THE SAFETY OF THE BUS AND EQUIPMENT IS SECONDARY TO THE SAFETY OF THE STUDENTS. NO ATTEMPT SHOULD BE MADE TO SAVE EQUIPMENT OR PERSONAL ITEMS UNTIL ALL STUDENTS ARE REMOVED FROM THE BUS SAFELY, ARE OUT OF DANGER AND ARE SUPERVISED.**

*The full document is located at [National Association of State Directors of Pupil Transportation Services](#).*

#### RESOURCE – PLANNING SCHOOL SITES FOR SCHOOL BUS SAFETY

1. In the selection of school sites, major consideration should be given to the safety of students riding school buses. School buses will be forced to utilize the roads in and around the school site, plus public highways leading into the school area. High-density traffic flow near school exits and entrances due to the proximity of freeways, periodic commercial traffic or massive commuter traffic from industrial plants should be avoided. It must be recognized, in many cases, that the area designated for the school site has been selected prior to hiring an architect. It is suggested, therefore, that this information be issued to boards of education and municipal planning authorities alerting them to the dangers inherent in the process of site selection. It is also suggested that boards of education discuss the selection with the superintendent of schools, traffic engineers and the state office of school plant planning and solicit their help in evaluating possible school sites.
2. The location of the school plant on a site should be determined to provide a safe means of entrance and exit for all students. When boards of education are considering school sites, the state, county and local roads servicing the area should have a minimum 30-foot paved width where loading and unloading is contemplated off the main

thoroughfare. If it is necessary to load or unload students on the main thoroughfare in front of the school, at least a 40-foot wide paved road should be provided.

3. All school bus traffic should be considered as one-way traffic flow, preferably with the entrance door side of the bus always next to the loading and unloading zone.
4. When separate pick-up and delivery points some distance from the teacher and student parking areas should be designated for parents, delivery, service, teacher and administrative traffic. Accident-inducing conditions are created by haphazard pick-up and delivery of students in the bus loading zones, particularly during inclement weather.
5. When roads that completely encircle a school should not be constructed. Areas that students must cross to engage in outside activities should be free of all vehicular traffic.
6. All school bus roads entering or exiting from main arteries should have a 50- to 100-foot radius turn on the inner edge of pavement. Within the school site, roads should have at least a 60-foot radius on the inner edge of pavement on all curves. At least a 50-foot tangent section should be provided between reverse curves. To minimize driveway entrance and exit widths, island construction may be required. Driveway openings must conform to local requirements and driveways opening onto state highways should be approved by the state highway department.
7. Curbing, with suitable drainage, should be constructed on all roads utilized by school buses within the school site. Consideration should be given to state highway department performance specifications. A minimum of 30 feet should be maintained for one-way traffic and 36 feet for two-way traffic, with roads being wider on all curves.
8. It is desirable to separate all parking areas; however, it might be advantageous if only the visitor parking area were near the school. Care should be exercised in the placement of these areas to preclude the visitor from crossing the school bus traffic pattern.
9. Prior to designing and laying out roads and parking lots, architects should consult with the school administration on the following items:
  - a. Total number of students and school personnel;
  - b. Number of present and projected students to be transported;
  - c. Number of buses;
  - d. Type of schedule; and
    1. Staggered opening and closing times; and
    2. Single opening and closing times.
  - e. Extra-curricular activities that would necessitate use of school buses.
10. It is desirable to locate parked buses on school grounds to prevent glare from reflective surfaces of windows, doors and windshields from being transmitted to the students in the classroom.
11. Attention should be given in planning school bus parking, loading and unloading areas. Parking should exclude the necessity for backing the bus.
12. Sidewalk plans for students walking to school should eliminate crosswalks in front of the buses.
13. Architects' plans for school buildings often include bus canopies. Such units are not considered feasible for schools with large enrollments. Canopies are advantageous in schools attended by students with disabilities. The height of the canopy should accommodate the highest school buses. Each canopy support post adjacent to the driveway curb should have a three-foot minimum setback from the curb to minimize the possibility of crushing a student between the support post and arriving school buses.
14. For areas that will be constantly utilized by heavy school buses, the type of pavement and base should conform to state highway department specifications.
15. All roads within the school site should be graded to avoid configurations that could impair a

- motorist's vision. It is suggested that a maximum 5% grade be allowed on all roads and, at entrance and exit points, a maximum 2% grade be allowed. Blind corners and intersections should be eliminated. Trees and shrubbery planted on the school site should not obstruct a motorist's vision.
16. Plans for the location of access and service roads should exclude conditions that would require school buses to be backed on the school premises.
  17. Safety at all student loading and unloading areas should be considered and provided on the school site.
  18. Plans for loading facilities should include separate areas specially designed for students with disabilities. Attention should be given to entrance ramps and handrails.
  19. Plans for roads and loading areas should accommodate emergency vehicles which must have access to the school always.
  20. Where necessary, traffic control devices should be provided to assist school traffic to enter the regular traffic flow.

#### SCHOOL BUS DRIVER TRAINING

~~(See DRIVER INSERVICE TRAINING PROGRAM)~~

School bus driver training is one of the most important components of the school bus transportation system. A critical component of school bus driver training is the recognition of potential driving hazards and appropriate adjustment of driving behavior to ensure the safety of the school bus occupants. The goal of this project and report is to provide school bus drivers and substitute drivers with a list of locations/situations that should be recognized as being potentially hazardous. School bus drivers should be properly trained to deal with these potentially hazardous conditions. In addition, school bus drivers should be trained to deal with hazardous conditions that occur suddenly or are of a temporary nature. Constant dialogue between school bus drivers and route planners is critical to ensure the continued safe transportation of students in school buses.

#### Methodology:

The National Association of State Directors of Pupil Transportation (NASDPTS) undertook the following activities to develop a school bus route hazard identification system and a means of educating school bus drivers about such hazards. Each of the activities included review and comment by the various state directors of pupil transportation. Throughout this report, specific comments from states are included to illustrate the involvement and insight provided by the state directors.

##### **1.—Define School Bus Route Hazard**

The first, and most critical, step was to develop an acceptable and reasonable definition of what constitutes a "school bus route hazard." From a practicable perspective, "school bus route hazards" can be grouped into two distinct categories. First, there are "driving hazards" that are encountered while operating a school bus route, such as railroad grade crossings and industrial intersections. Second, there are "school bus loading zone hazards" that are encountered at a school bus stop, such as a narrow, busy street without sidewalks or dangerous curves that do not provide the school bus driver, the students, or other motorists with an adequate view of the school bus loading zone. The scope of work for this project only included the first category of school bus route hazards—driving hazards.

##### **2.—Develop a "Model" School Bus Route Hazard Identification System**

Based on the knowledge and expertise of individuals within the school transportation industry, an ideal program that could be used to assist states and local school districts in identifying and evaluating potential school bus route hazards was defined. This ideal program became the "model" against which existing school bus route hazard identification programs were compared.



### **3.—Review Existing Materials/Information**

Examples of existing state or local school district route hazard identification programs were reviewed and compared with the “model” system described above. The existing programs were reviewed in terms of the ability of the program to identify route hazards and communicate that information to the appropriate individuals.

### **4.—Develop a Recommended System**

Based on the review of existing programs, as compared to the “model” system, a recommended school bus driving route hazard identification system was developed that could provide states and local school districts with an efficient method for identifying potential school bus route hazards and a means of communicating information about those hazards to school bus drivers and trainers, route planners, and other appropriate school transportation officials.

### **5.—Dissemination Approaches**

Finally, suggestions were made on how to disseminate the “recommended” system to the school transportation community, and what approaches should be taken to educate state and local school transportation providers on the importance of adopting such a school bus driving route hazard identification system.

## **RESULTS OF PROGRAM ACTIVITIES:**

### **Result #1 — Definition of a School Bus Route Driving Hazard**

While it is possible to develop a list of the potential hazardous locations/situations that a school bus driver could encounter while driving a school bus route, it is not possible to develop a definitive list of every potential driving hazard. As was pointed out by the state of Indiana during discussions of this project, “Regular review of the route hazards list is encouraged. This will keep the document accurate and permit the addition of ‘yet-to-be-discovered’ hazards.”

Some potential school bus route driving hazards can be considered as “fixed,” in that the situation or condition exists (such as a railroad crossing), can be identified, and drivers can be informed and educated about the potential hazard. Other potential driving hazards occur without advanced warning — examples include: (1) inclement weather conditions, such as fog, sand storms, blinding sunlight, snow storms, etc.; (2) conditions that result from weather conditions, such as flooded roadways, fallen trees, downed power lines; and (3) accident locations. This report focuses on potential school bus route driving hazards that are of a “fixed” nature.

### **Discussion:**

Table 1 details many of the potentially hazardous locations/situations that a school bus driver could encounter while driving a school bus route. These potential driving hazards were selected based on the belief that the mere existence of any one of these conditions poses possible serious consequences if the school bus driver is not aware of the existence of the hazard. While a hazard could develop at any time while driving a school bus (for example, a tree could fall across a road during a storm, or a stream could overflow, or a wet road could suddenly ice over), this list defines only fixed conditions that, by their presence, have been deemed a potential driving hazard. Also, this list is limited to the hazardous locations/situations encountered while driving the school bus, not during loading and unloading operations.

For each potential school bus route driving hazard, a list of factors or situations that could contribute to causing the hazard is provided. It is important to remember that this list of potential school bus route driving hazards, and the factors/situations within them, is not “all inclusive.” States and local school districts may encounter factors and situations that are not listed below, but which they deem are potentially hazardous.

## **List of Potentially Hazardous Locations/Situations on School Bus Routes**

### **Railroad Grade Crossing**

- \* \_\_\_\_\_ Number of tracks
- \* \_\_\_\_\_ Visual obstructions to determine type and travel speeds of trains
- \* \_\_\_\_\_ Train schedules (consider unscheduled trains also)
- \* \_\_\_\_\_ Presence or absence of grade crossing controls
- \* \_\_\_\_\_ Unique characteristics or operation of grade crossing controls
- \* \_\_\_\_\_ Presence or absence of traffic control signals, including interaction with grade crossing controls
- \* \_\_\_\_\_ Size of queuing area before and after the tracks
- \* \_\_\_\_\_ Expected traffic conditions at various times during the day
- \* \_\_\_\_\_ Roadway design near the grade crossing

### **Dangerous Intersections and Roadways**

- \* \_\_\_\_\_ High-frequency crash locations as defined by state transportation and/or law enforcement officials
- \* \_\_\_\_\_ Uncontrolled intersections
- \* \_\_\_\_\_ Curves and intersections with limited sight distances
- \* \_\_\_\_\_ Areas with no shoulders or drop-off to shoulder
- \* \_\_\_\_\_ Visibility of traffic control signals
- \* \_\_\_\_\_ Coordination of traffic control signals with others in the immediate area

### **Bridges, Tunnels/Underpasses and Overpasses**

- \* \_\_\_\_\_ Weight capacity
- \* \_\_\_\_\_ Height clearances
- \* \_\_\_\_\_ Lane width

### **Queuing/Storage Areas**

- \* \_\_\_\_\_ Short acceleration/deceleration lanes
- \* \_\_\_\_\_ Limited median areas crossing multi-lane highways
- \* \_\_\_\_\_ Turning lanes
- \* \_\_\_\_\_ Bus turnarounds
- \* \_\_\_\_\_ Areas that require backing of the bus to turnaround or park

### **Industrial Intersections and Construction Zones**

- \* \_\_\_\_\_ Areas where heavy vehicles/equipment operate on a regular basis, and may be entering, exiting, or crossing the roadway
- \* \_\_\_\_\_ Steep Downgrades
- \* \_\_\_\_\_ Mountainous areas where brake condition and braking operations are important
- \* \_\_\_\_\_ Location of out-of-control vehicle run-off areas

### **Areas of Significant Speed Differential between Vehicles**

- \* \_\_\_\_\_ On-off ramps to high-speed roads
- \* \_\_\_\_\_ Farm vehicle areas, including non-motorized vehicles on the road
- \* \_\_\_\_\_ Mountain terrain

### **Pedestrian Areas**

- \* \_\_\_\_\_ School bus loading/unloading zones
- \* \_\_\_\_\_ Narrow streets with parked motor vehicles – children darting between vehicles
- \* \_\_\_\_\_ Congested shopping and business areas
- \* \_\_\_\_\_ Parks or intersections with pedestrian/bicycle paths

### **Other Conditions Identified in Local Area**

1. Unique roadway locations, for example:
  - a. Roadways without guardrails that are next to rivers, lakes, etc.
  - b. Dirt or gravel roads that could affect braking
  - c. Rock quarry or open pits
  - d. Areas with problems related to right turn on red laws
  - e. Areas with visibility problems due to air quality/industrial smoke/etc.
  - f. Areas where emergency equipment operate on a regular basis
    - (1) fire stations
    - (2) hospitals

### **Result #2—Development of a “Model” School Bus Route Hazard Identification System**

During the course of this project, a “model” school route hazard identification system was outlined. It was recognized that such a system would consist of three major components:

1. A list of potential driving hazards;
2. A specified procedure/schedule for conducting on-site reviews of school bus routes; and
3. An efficient and effective means of informing school bus drivers of the presence of potential driving route hazards.

Of the three components, the first was determined to be the most critical, since without a definition of what constitutes a school bus route driving hazard, the other components would have little utility.

Additionally, developing a procedure and schedule for reviewing school bus routes and an information dissemination plan were viewed as administrative policy decisions that were independent of the technical issues related to identifying potential school bus route driving hazards. Accordingly, the focus of the effort was placed on identifying and listing potential school bus route driving hazards.

An initial list of potential hazards was prepared during a Working Session of state directors during the 1997 annual conference of the National Association of State Directors of Pupil Transportation Services. The results of that session were summarized and provided for review to all state directors of pupil transportation. The final results of that effort are discussed in the previous section of this report, “Result

#### **#1—Definition of a School Bus Route Driving Hazard.”**

### **Result #3—Review of Existing Materials/Information**

A review of existing school bus route hazard identification systems was made to see if any system assessed all of the potential driving hazards developed during the Working Session at the 1997 annual conference. Not one was found. However, this effort identified additional potential hazards that were not previously considered, but were ultimately included in the final list of school bus route driving hazards as defined in Result #1 above.

### **Result #4—Defining a Route Hazard Identification System**

The major goal of this project was to develop a system that a state or a local school district could use to:

- \* Identify any fixed locations/situations that constitute a potential school bus driving hazard; and
- \* Inform school bus drivers and substitute drivers of each identified potential route hazard on the school bus route(s) they drive.

### **Identification**

The first component of such a system would consist of an established, systematic process to evaluate all school bus routes to determine whether any potential fixed driving hazards exist. An annual review of each school bus route by a person trained to identify potential route-driving hazards would provide the basis for identifying any potential hazards. In addition, school bus drivers should be trained in how to recognize a potential school bus route-driving hazard, and to report any new potential hazardous conditions to the appropriate school transportation officials. In effect, this would provide for continual monitoring and review of school bus routes so school bus drivers are aware of all potential fixed driving hazards on their routes. As stated by Connecticut, “constant communication between school bus drivers and route planners is critical to safety.” Hazards can and do change, even on a daily basis. As such, “daily updates of critical route hazards should be foremost in the minds of dispatchers and drivers.” A checklist format based on the above list of potential school bus driving route hazards (Result #1 — Table 1) would provide for a consistent means of ensuring that such items were considered during the review of each school bus route. An example of such a checklist for the items identified in Result #1 appears as Appendix A to this report, \* and is based on a format utilized in Oklahoma. It is important to remember that a state or a local school district should ensure that any potential hazards that may be unique to their area, or any potential hazards that they believe were missing, are added to the checklist. In addition to regular school bus routes, there also can be potential driving hazards along routes taken for field trips or extra-curricular activities. In such cases, drivers may be able to identify potential route-driving hazards based on their personal knowledge of the route or on a previous trip to the same location.

(Report being quoted above; checklist found in the appendix following.)

#### **Information**

The second component of a school bus route-driving hazard identification system consists of a means of informing all regular and substitute school bus drivers of the potential driving hazards on their school bus route(s). New Jersey stressed the importance of “the need for drivers and driver trainers to make clear notes of these hazards for all substitute drivers.” In addition to the drivers, school bus route planners/schedulers/dispatchers, etc. should be made aware of all information about potential driving hazards on the school bus routes. This information would allow them to make changes or adjustments to the routes, when reasonable and practicable, so as to minimize or eliminate the exposure of school buses to these route-driving hazards. Informing the necessary people about potential school bus route-driving hazards can be accomplished in a number of ways. The most practical, and possibly most easily understandable, appears to be through the use of a map that is visually annotated to identify potential route hazards. The same map could obviously be used for other purposes, including designating the actual school bus route and student pick-up/drop-off locations. Additionally, as the states of Ohio and Virginia noted in their comments to this project, information on the location of police/fire/rescue stations, hospitals, and other emergency care facilities, and “possible ‘safe stops’ where a school bus may pull off the road and await aid in the event of an emergency” could be added to the map. A number of local school districts currently use mapping techniques to document the streets in their district, the location of the students’ homes, the school bus stops, and the routes traveled by school buses. Inexpensive color printers allow school districts to print color maps of their bus routes, and computer software allows route planners to incorporate custom information, such as route hazards, on the map. Whatever means is chosen, it is important that school bus drivers be provided with route hazard information in a standardized, consistent manner. Also, the route hazard information should be available to the school bus driver every day, no matter which school bus is driven on that day.

## **Training**

While not a specific part of this project, the importance of training school transportation providers about school bus route driving hazards cannot be understated. In their comments, Ohio noted that the contents of a route hazard identification system are “only good if utilized.” In other words, if drivers are not made aware of the potential driving hazards and trained on how to deal with such potential hazards, then no benefits will accrue from efforts to identify potential route hazards. Mississippi commented that its training in route hazards constantly works “to instill in each driver the concept of Expect the Unexpected.”

However, training alone does not guarantee success. As Connecticut stated, “Route hazards is an area in which some training can be afforded, but common sense and networking among drivers, local officials, and school district personnel is paramount to a safe and successful route hazard notification program.”

## **Result #5—Dissemination Approaches**

Based on the belief that the ultimate success of a school bus route driving hazard identification system is dependent on the awareness and use of the system by school transportation providers, it is strongly suggested that the results of this project be provided to all state directors of pupil transportation, the appropriate student transportation officials in each school district, and organizations affiliated with private/parochial schools. The dissemination to state directors and public schools districts could be made by use of direct mailings. The dissemination to private/parochial schools could be made through national associations that represent such schools.

As a supplement to direct mailings, the report on this project should be made available on the NHTSA and various school transportation web sites in a form that can be downloaded. In addition, the results of this project should be publicized through the various media that deal with pupil transportation.

### **Non-Fixed School Bus Route Hazards:**

As mentioned earlier, this project only dealt with school bus route driving hazards that are “fixed.” However, it is recognized that other driving hazards can occur without advanced warning. These often result from inclement/adverse weather conditions or poor visibility conditions. It is important for school bus drivers to be aware of such possibilities and be trained on how to deal with such sudden potential hazards. As an example of some non-fixed driving hazards, Iowa includes in its School Bus Driver’s Handbook procedures to follow should a school bus encounter a tornado or Agri-Chemical clouding along school bus routes. Also, Delaware provides drivers with information in its School Bus Driver’s Handbook to prepare them for the following:

### **Adverse weather conditions**

- \* \_\_\_\_\_ Extreme heat
- \* \_\_\_\_\_ Rainstorms
- \* \_\_\_\_\_ Flooding
- \* \_\_\_\_\_ Dust
- \* \_\_\_\_\_ Fog
- \* \_\_\_\_\_ Snow/ice/Blizzard
- \* \_\_\_\_\_ Smoke
- \* \_\_\_\_\_ Wind
- \* \_\_\_\_\_ Freezing rain

### Conditions affecting visibility

- \* \_\_\_\_\_ Sun glare
- \* \_\_\_\_\_ Darkness
- \* \_\_\_\_\_ Curves and hills

Wild animals are another example of a non-fixed school bus route driving hazard. In many rural and suburban areas, animals such as deer and livestock can be a danger to motorists. School bus drivers should be made aware of such situations and learn how to deal with them.

### Conclusions:

Recognizing the importance of identifying school bus route driving hazards, the National Association of State Directors of Pupil Transportation Services has conducted this study for the National Highway Traffic Safety Administration. Verbal and written information from members of the Association was consolidated to focus on the key issues and the best approach for addressing the problem of driving hazards on school bus routes. The following conclusions were reached during the study:

- a. \_\_\_\_\_ Driving hazards can and do exist on school bus routes.
- b. \_\_\_\_\_ Driving hazards on school bus routes that are of a "fixed" nature can be identified.
- c. \_\_\_\_\_ School transportation officials should establish a program to routinely and systematically evaluate all school bus routes for potential driving hazards.
- d. \_\_\_\_\_ A list of potential fixed school bus route driving hazards has been developed for use in evaluating school bus routes.
- e. \_\_\_\_\_ Information on potential school bus route driving hazards should be provided to all regular and substitute school bus drivers, route planners, dispatchers, and other appropriate personnel.
- f. \_\_\_\_\_ School bus drivers should be trained on how to effectively deal with potential school bus route driving hazards, of both a fixed or sudden nature.

The results of this project should receive wide dissemination.

The National Association of State Directors of Pupil Transportation (NASDPTS) encourages states, local school districts, and private/parochial schools to review this report in conjunction with their school transportation operations and take whatever actions are necessary to ensure that school bus route driving hazards are identified and made known to all appropriate school bus drivers and school transportation personnel.

Document is located at National Association of State Directors of Pupil Transportation Services.

### CHECKLIST FOR IDENTIFYING POTENTIAL SCHOOL BUS ROUTE

#### Fixed Driving Hazards Railroad Grade Crossings Railroad Grade Crossing Identification Number: Location:

|                                                     |           |         |          |
|-----------------------------------------------------|-----------|---------|----------|
| How many tracks are present?                        | Passenger | Freight | Commuter |
| What types of trains use the track?                 |           |         |          |
| What are the times of the scheduled trains?         |           |         |          |
| What are the travel speeds of the scheduled trains? |           |         |          |

a. Are the regulatory signs (crossbucks) clearly visible? \_\_\_\_\_

b. Are there regulatory devices (lights/gates/bells) present? \_\_\_\_\_

c. Are there any unique characteristics to the operation of the crossing controls? \_\_\_\_\_

What are they? \_\_\_\_\_

d. When stopped approximately 15 feet from the nearest railroad track, is there an unobstructed sight distance of approximately 1,000 feet in both directions? \_\_\_\_\_

e. Is there at least enough room on the other side of the furthest \_\_\_\_\_



f. Are there any roadway design features that could affect the safe operation of a school bus at the railroad crossing?

What are they? Dangerous Intersections and Roadways Location

a. Is this a high frequency crash location?

b. Are traffic control devices present?

c. Are there visibility obstructions?

What are they?

Yes No

d. Are there areas with no shoulders or drop to shoulder?

e. Are there peculiar roadway features?

What are they?

#### Bridges, Tunnels/Underpasses and Overpasses Location

Yes No

a. Is the weight capacity of the bridge/overpass sufficient

for a fully loaded school bus?

b. Is the height of the tunnel/underpass adequate for the tallest school bus, including open roof hatches?

c. Is the lane width of the bridge, tunnel/underpass, or overpass

adequate for the widest school bus, including the mirrors?

#### Queuing /Storage Areas Location

Yes No

a. Is there sufficient area for the largest school bus in the

acceleration/deceleration lane?

b. Is there sufficient area for the largest school bus in the median area between a multi-lane road?

c. Is there sufficient area for the largest school bus in the turning lane?

#### Industrial Intersections and Construction Zones

#### Steep

**Downgrades****Location**

- |          |                                                                                                       |           |          |
|----------|-------------------------------------------------------------------------------------------------------|-----------|----------|
| a. _____ | Do heavy vehicles enter/exit/cross-<br>the roadway frequently? _____                                  | Yes _____ | No _____ |
| b. _____ | Are there highway signs alerting drivers of the<br>industrial/construction traffic? _____             | _____     | _____    |
| c. _____ | Are there highway signs alerting drivers to the<br>downgrade? _____                                   | _____     | _____    |
| d. _____ | Are there signs alerting drivers to "Check Brakes?" _____                                             | _____     | _____    |
| e. _____ | Are there areas marked and designated for vehicles to<br>safely leave the road (run-off areas)? _____ | _____     | _____    |

**Areas of Significant Speed Differential between Vehicles Location**

- |           |                                                                                                                                                      |       |       |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------|
| Yes _____ | No _____                                                                                                                                             |       |       |
| a. _____  | Is there sufficient space to accelerate/decelerate a<br>school bus when entering/exiting a high-speed road? _____                                    | _____ | _____ |
| b. _____  | Does slow-moving farm equipment operate on the road? _____                                                                                           | _____ | _____ |
| c. _____  | Do non-motorized vehicles, e.g., horse-drawn carriages,<br>operate on the road? _____                                                                | _____ | _____ |
| d. _____  | Are there roadway conditions, e.g., mountainous terrain,<br>that result in vehicles operating at high speeds and low speeds?<br>What are they? _____ | _____ | _____ |

**Pedestrian Areas Location**

- |          |                                                                                                |           |
|----------|------------------------------------------------------------------------------------------------|-----------|
|          | <b>Yes</b>                                                                                     | <b>No</b> |
| a. _____ | Are there difficulties seeing pedestrians at school bus stops? _____                           | _____     |
| b. _____ | Are there narrow streets with parked vehicles where children may<br>run into the street? _____ | _____     |
| c. _____ | Are there areas of heavy pedestrian congestion, e.g., shopping<br>and business areas? _____    | _____     |
| d. _____ | Are there difficulties seeing pedestrians at school bus stops? _____                           | _____     |
| e. _____ | Are there narrow streets with parked vehicles where children may<br>run into the street? _____ | _____     |
| f. _____ | Are there areas of heavy pedestrian congestion, e.g., shopping<br>and business areas? _____    | _____     |

#### **Other Conditions Identified in Local Area Location**

|                                                                                                            |           |          |
|------------------------------------------------------------------------------------------------------------|-----------|----------|
| a. Are there unique roadway conditions?                                                                    | Yes _____ | No _____ |
| b. Roads without guardrails that pose a danger, e.g., next to rivers, lakes, quarries?                     | _____     | _____    |
| c. Dirt or gravel roads that could affect braking?                                                         | _____     | _____    |
| d. Others?                                                                                                 | _____     | _____    |
| e. Are there roadway conditions that make it difficult to make a "right turn on red?"                      | _____     | _____    |
| f. Are there areas with visibility problems due to industrial smoke, air quality, etc.?                    | _____     | _____    |
| g. Are there areas where emergency equipment operate on a regular basis, e.g., fire stations or hospitals? | _____     | _____    |

#### **POLICIES, PROCEDURES AND TOPICS FOR STUDENT MANAGEMENT**

Policies and procedures which address the following topics should be developed and implemented by school districts:

1. The bus driver's authority over, and responsibility for, students while in transit;
2. The student's right to due process when disciplinary action is taken;
3. A step-by-step procedure for resolving problems when the driver needs assistance;
4. The conditions under which a student might be temporarily or permanently suspended from the bus-riding privilege;
5. Procedures for handling emergencies;
6. Use of bus attendants or monitors;
7. Requirements and responsibility for school bus passenger and pedestrian safety instruction;
8. Parent's or guardian's responsibility for damage caused by their children to the bus or its equipment;
9. Rules and procedures for safe travel;
10. Driver, attendant, student and parent training for student management;
11. Special needs teamwork, collaboration, and communication between transportation staff, special education staff, health services personnel and parents in the development of an Individual Transportation Plan (ITP) for each student with a defined disability;
12. Rules and procedures for safe travel; and
13. Driver, attendant, student and parent training for student management.

#### **EVALUATION CHECKLIST FOR SCHOOL BUS**

##### **DRIVEWAYS IN THE VICINITY OF THE SCHOOL**

NAME OF THE SCHOOL: \_\_\_\_\_ DATE: \_\_\_\_\_  
LOCATION OF THE  
SCHOOL: \_\_\_\_\_

|                                                                                                                                                                        |           |          |                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----------|----------------------|
| 1. School bus loading areas are provided on the school site.                                                                                                           | YES _____ | NO _____ | DOES NOT APPLY _____ |
| 2. When loading and unloading of school students take place on a main thoroughfare in front of the school, the roadway has a minimum width of 40 feet of hard surface. | _____     | _____    | _____                |
| 3. The driveway leading to and from the loading and unloading area for school buses has a minimum width of 30 feet of paved surface.                                   | _____     | _____    | _____                |

- |                                                                                                                                                       |       |       |       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------|-------|
| 4. If diagonal parking is provided for buses in the loading and unloading area, a minimum width of 60 feet of paved surface is available.             | _____ | _____ | _____ |
| 5. Parking for loading and unloading of students at school is bumper to bumper or diagonal; in either case, the necessity for backing does not exist. | _____ | _____ | _____ |
| 6. The school bus is not required to back anywhere on school property.                                                                                | _____ | _____ | _____ |
| 7. All school bus movement on the school grounds is one-way in a counter-clockwise direction.                                                         | _____ | _____ | _____ |
| 8. School bus traffic does not completely encircle the school building.                                                                               | _____ | _____ | _____ |
| 9. The driver has proper sight distance at all points along the driveway.                                                                             | _____ | _____ | _____ |
| 10. Crosswalks for students do not exist at the entrance to the school bus driveway.                                                                  | _____ | _____ | _____ |
| 11. Separation is maintained between school bus traffic and all other traffic.                                                                        | _____ | _____ | _____ |
| 12. Vehicular pick-up points for non-bus students are on a separate driveway from that used by school buses.                                          | _____ | _____ | _____ |
| 13. Curbing and suitable drainage are provided along driveways.                                                                                       | _____ | _____ | _____ |
| 14. Curbing and driveway construction comply with state highway specifications.                                                                       | _____ | _____ | _____ |
| 15. At ingress and egress areas to and from the school, there is a minimum radius on inner edge of driveway pavement from 50 to 100 feet.             | _____ | _____ | _____ |
| 16. On the school site, there is a minimum radius of inner edge of driveway pavement of 60 feet.                                                      | _____ | _____ | _____ |
| 17. Between reverse curves, at least a 50-foot tangent section is provided.                                                                           | _____ | _____ | _____ |
| 18. At ingress and egress points a maximum grade of 2% is adhered to.                                                                                 | _____ | _____ | _____ |
| 19. A maximum grade of 5% is adhered to on the school bus driveway within the school site.                                                            | _____ | _____ | _____ |

**Note:** A "yes" answer for each of the items indicates a well-planned traffic pattern for school buses. SIGNATURES:

Person making the report:

\_\_\_\_\_

Title:

\_\_\_\_\_

Director of School Transportation:

**Note:** Most of the items included in this Evaluation Checklist are based on a 1966 Report of the Special Committee on School Plant Evaluation "School Planning: Safe Transporting," Bureau of Pupil Transportation, Department of Education, Trenton, New Jersey 08652.

#### STUDENT RULES

##### Supervision and Disciplinary Guidelines

1. Student shall follow directions of the driver the first time given.
2. Student shall arrive at the bus stop before the bus arrives.
3. Student shall wait in a safe place, clear of traffic and away from where the bus stops.
4. Student shall wait in an orderly line and shall avoid horseplay.

5. ~~Student shall cross the road or street in front of the bus only after the bus has come to a complete stop and upon direction of the driver.~~
6. ~~Student shall go directly to an available or assigned seat when entering the bus.~~
7. ~~Student shall remain seated and keep aisles and exits clear.~~
8. ~~Student shall exhibit classroom conduct at all times.~~
9. ~~Student shall refrain from throwing or passing objects in, from or into buses.~~
10. ~~Student is permitted to carry only objects that can be held on his/her lap.~~
11. ~~Student shall not use profane language, obscene gestures, tobacco, alcohol, drugs or any other controlled substance in the bus.~~
12. ~~Student shall refrain from eating and drinking in the bus.~~
13. ~~Student shall not carry hazardous materials or non-service animals into the bus.~~
14. ~~Student shall respect the rights and safety of others.~~
15. ~~Student shall refrain from leaving or boarding the bus at locations other than the assigned stop.~~
16. ~~Student shall refrain from extending head, arms or objects out of the bus windows.~~
17. ~~Student shall refrain from hitching rides via the rear bumper or other parts of the bus.~~

#### BUS CONDUCT REPORT

BUS NO. \_\_\_\_\_ SCHOOL: \_\_\_\_\_ DATE: \_\_\_\_\_

Students in the School District who ride buses are subject to rules and regulations designed to provide safe transportation to and from school. Any behavior which distracts the driver is a serious hazard to the safe operation of the vehicle, and as such, jeopardizes the safety of all passengers. Consequence of continued inappropriate behavior could result in your child being denied the bus riding privilege. \_\_\_\_\_ has

been cited for an infraction of the rule(s) checked below: (name)

|                                                              |                                    |
|--------------------------------------------------------------|------------------------------------|
| Failure to remain seated _____                               | Lighting matches _____             |
| Scuffling or fighting _____                                  | Throwing objects from window _____ |
| Profanity or obscene language _____                          | Refusing to obey driver _____      |
| Smoking in the bus _____                                     | Bothering _____                    |
| others Extending arm or head out window _____                | Throwing _____                     |
| objects in bus Possession of harmful or illegal items. _____ | Other _____                        |

(See Comment)

COMMENT: \_\_\_\_\_

\_\_\_\_\_ DRIVER'S SIGNATURE:

\_\_\_\_\_ DATE:

\_\_\_\_\_ PRINT NAME: \_\_\_\_\_

\_\_\_\_\_ DATE OF OFFENSE:

\_\_\_\_\_ FIRST OFFENSE:

\_\_\_\_\_ SECOND OFFENSE:

\_\_\_\_\_ THIRD OFFENSE:

\_\_\_\_\_ SCHOOL ADMINISTRATOR'S ACTION:

\_\_\_\_\_

\_\_\_\_\_ SCHOOL ADMINISTRATOR'S SIGNATURE:

\_\_\_\_\_ DATE:

\_\_\_\_\_ PRINT NAME: \_\_\_\_\_

\_\_\_\_\_ PARENT/GUARDIAN'S

COMMENT: \_\_\_\_\_

\_\_\_\_\_ PLEASE SIGN AND RETURN TO SCHOOL

ADMINISTRATOR

Parent's/Guardian's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

---

---

---

---

---

---

---

~~Administrator~~ ~~Canary Copy:~~ ~~Bus Driver~~ ~~Pink Copy:~~ ~~Parent/Guardian~~ ~~Gold Copy:~~ ~~Student~~

[**Note:** A form, such as the one above, should be used for reporting purposes. First offenses require at least a notification to the student and parent or guardian (either by phone or in person) by appropriate school personnel. Second and subsequent offenses may require a conference with the student, parent or guardian, driver and school administrator(s), which may result in a period of suspension of the student's riding privileges.] FLYERS

### WHEN LEAVING YOUR BUS:

## Here's How to Cross the Road SAFELY

**WALK**—along the side of the road until you can see your driver

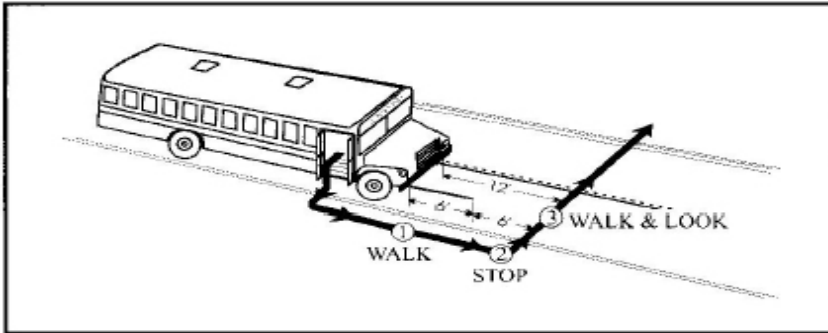
**STOP**—wait for the signal to cross

**WALK & LOOK**—for traffic both ways

- if you see a vehicle that has not

stopped, go back to the bus immediately

—if all vehicles have stopped, cross the road quickly.



*Crossing the Highway is DANGEROUS*

REMEMBER

- WALK
- STOP
- WALK & LOOK

**Drivers SHOULD stop...But  
THEY MAY NOT!**

~~\*Change word DRIVERS to MOTORISTS in graphic above~~  
~~INSERT AFTER THE STEP STOP ABOVE:~~

~~WALK & STOP—go to the driver-side cross-view mirror and look both ways wait for the signal to continue across the road~~

~~On diagram, change position 3 to: WALK & STOP and Add a position 4 WALK & LOOK~~



~~WHEN BOARDING YOUR BUS:~~

~~Here's How to Cross the Road~~

~~SAFELY~~

~~FOLLOW THE 12 FOOT RULE:~~

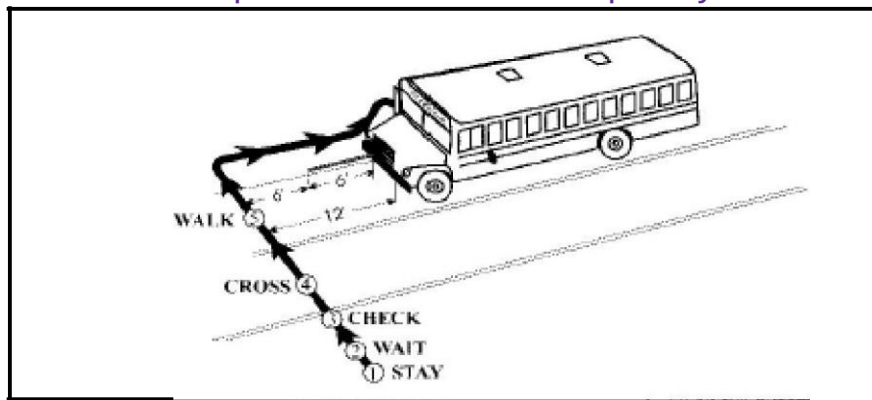
~~STAY 12 feet on your side of the road far away from the traffic~~

~~WAIT for the bus to stop and for your driver's signal to cross~~

~~CHECK traffic both ways then check again~~

~~CROSS walk directly across, checking traffic both ways~~

~~WAIT approximately 12 feet ahead of the bumper and board the bus quickly~~



~~Crossing the Highway is DANGEROUS~~

**REMEMBER**

~~Drivers should stop, ... But~~  
~~THEY MAY NOT!~~

- ~~Stay 12 feet on your side of the road until your driver signals you to cross~~
- ~~Check traffic and recheck from traffic~~
- ~~Follow the 12-foot rule~~
- ~~Board bus quickly and directly to your seat~~

## RECOMMENDED PROCEDURES FOR ESCORTED CROSSING

*(Legal references in this procedure can be found within California Code of Regulations (CCR) and CA Education Code (EC) and may be adapted for other states)*

1. Begin slowing the bus to get ready for the designated stop.
2. As you approach the stop, turn on the amber warning light, if the bus is so equipped, beginning 200 feet before the bus stop.
3. Apply the brakes with enough pressure to activate the stop lights so that following vehicles will anticipate the bus is preparing to stop.
4. Check all mirrors to ensure that traffic is gone and it is safe to turn to the right and stop.
5. Turn on the right-side turn signal lights during the last 100 feet before turning into the stop.
6. Approach the pupils slowly and with extreme care, considering the roadway surface (wet or slippery, sloped or flat, rough or smooth ground).
7. Do not stop any closer than 12 feet from the waiting pupils. They should be facing the approaching bus. (Refer to Figure SL5-2, "Danger zones.")
8. Once the bus is stopped, cancel the right-side turn signal lights and apply the parking brake.
9. Place a standard transmission in first or reverse gear or, if an automatic transmission, place in the park position. On buses equipped with an automatic transmission that does not have a park position, place the transmission in neutral.
10. Turn off the engine.
11. Remove the ignition key and keep it in your possession.
12. Deactivate the amber warning light.
13. Check all mirrors; activate the flashing red light signal (crossover lights) and stop signal arm, if the bus is so equipped; and wait for traffic to stop.
14. Open the entrance door and look in all directions on the right side of the bus before exiting.
15. Remove the handheld stop sign from the holder.
16. Step off the bus and walk approximately 12 feet in front of the bus before turning to enter the roadway.
17. Turn toward the bus, look up, and verify that the amber warning light is off and the red light signal is flashing.
18. Walk from the right edge of the roadway away from the bus at a 45-degree angle and toward the center of the roadway. Stop before entering the traffic lane and look in all directions for traffic. This position allows the best view of traffic coming from the left and is protected. The handheld stop sign shall be used for all escorted crossings and should be held vertically, above waist level, with the word STOP facing traffic in both directions. This is one of the most dangerous places on earth; a public highway. Do not assume that vehicles will stop or that all pupils will follow procedures. Vehicles may try to pass the bus, and pupils may attempt to run across the roadway before you are ready. Take charge of the situation. Upon reaching the center of the roadway, turn and face the pupils (left side of the roadway). This position enables you to have a clear view of the pupils and traffic in both directions.

**Note:** Traffic might not be able to stop immediately during adverse weather (e.g., rain, snow, ice).

**Note:** The signal for pupils to enter the bus will be the flashing of the red light signal, the school bus driver holding a handheld stop sign in the center of the highway or private road on which the school bus is stopped, and verbal direction by the school bus driver to begin crossing the highway to enter the bus, and not simply the bus coming to a stop. Pupils must have received written instruction in school bus emergency procedures and passenger safety before riding a school bus for the first time. Once each year pupils in prekindergarten through grade eight who

receive home-to-school transportation shall receive safety instruction on proper loading and unloading procedures, escorting by the driver, and crossing the street, highway, or private road (EC 39831.5).

**Note:** If the flashing red light signal (crossover lights) becomes inoperative prior to or during the escorting of pupils, the escort procedures must stop. Pupils may cross the highway only under the protection of a properly functioning flashing red light signal system.

SL5—8

1. When traffic has stopped in both directions, tell the pupils to walk, not run, as they cross the highway or private road. Do not use hand motions or gestures to signal pupils. Some motorists may mistake a hand gesture as a signal for them to proceed. The pupils must cross the roadway between you and the front of the bus, never behind you or to the rear of the bus.
2. When the last pupil has crossed the middle of the roadway, turn and face the bus (right side of the roadway). When the last pupil has reached the right side of the roadway, walk immediately to the right side of the roadway, continuing to hold the stop sign so it is visible to traffic in both directions. Check under and around the exterior of the bus to make sure that no pupil is in the danger zones. Enter the bus.
3. On entering the bus, ensure that all pupils have safely boarded and are seated.
4. Immediately place the handheld stop sign in the holder, close the entrance door, and turn off the flashing red light signal (crossover lights) and the stop signal arm if the bus is so equipped.
5. Sit down in the driver's seat and fasten the driver's seat belt. 24. Check to see that all pupils are accounted for and properly seated. Pupils must be seated before you set the bus in motion.
6. Check all mirrors for pupils, other pedestrians, and traffic. Be sure to check the front cross-view mirror(s) for pupils who may be in front of the bus.
7. Restart the engine. Account for all pupils before moving the bus.
8. Place the transmission in gear and release the parking brake.
9. Check the traffic and the danger zones by using all mirrors before moving the bus; activate the left-side turn signal lights and, when it is safe to do so, pull into the flow of traffic; cancel the left-side turn signal lights; regain road speed; and proceed to the next stop.

**Note:** School transportation administrators and other transportation officials should adopt policies that standardize signs or signals used by school bus drivers to inform hearing-impaired pupils of when it is safe to cross the highway.

**Note:** Emphasize the proper use of mirrors, the danger zones, and communication between the driver, pupils, and the public.

#### RECOMMENDED PROCEDURES FOR RAILROAD GRADE CROSSINGS

Each year, approximately 4,000 train/vehicle collisions occur at railroad crossings. These 4,000 collisions result in about 500 fatalities and 1,500 injuries. Unfortunately, some of the crashes involve school buses that result in injuries and fatalities to students. To avert these crashes, the following procedures are recommended to school bus drivers. It is important to note that these recommendations must be considered within the context of individual state laws and regulations.

Additional information and training materials on railroad crossing safety are available from: Operation Lifesaver, Inc.  
1420 King Street Alexandria, VA 22314

1-800-537-6224

Although the information and recommendations contained in this publication have been compiled from sources believed to be reliable, other or additional safety measures may be required under particular circumstances.

(Adapted from Fact Sheet, "Recommended Procedures for School Bus Drivers at Railroad Crossings," revised, School Transportation Section, 1998, National Safety Council, 1121 Spring Lake Drive, Itasca, IL 60143-3201, (630) 285-1121.)

## FORMS

### TRIP REQUEST FORM

|                              |                                       |
|------------------------------|---------------------------------------|
| Trip date:                   | School:                               |
|                              | Trip destination:                     |
|                              |                                       |
|                              | Depart from:                          |
|                              | No. passengers:                       |
|                              | Departure time:                       |
|                              | Arrival time:                         |
|                              | Extra equipment:                      |
|                              |                                       |
|                              | Meal stop required? yes — no If yes,  |
| where?                       |                                       |
|                              | Equipment that will need to be        |
| transported:                 |                                       |
|                              | Special needs equipment requirements: |
|                              |                                       |
|                              | Overnight travel requirement:         |
|                              |                                       |
|                              | Number of adults accompanying the     |
| students:                    |                                       |
| Transportation requested by: | Date:                                 |
|                              |                                       |
|                              | Approved by:                          |
|                              | Date:                                 |
|                              |                                       |
|                              | Reimbursement category:               |
|                              |                                       |
|                              |                                       |

### TRANSPORTATION USE FORM

|                         |                |             |
|-------------------------|----------------|-------------|
| Vehicle assigned:       | Driver:        |             |
|                         |                |             |
| Spot time:              | Spot location: |             |
|                         |                |             |
| Routing information:    |                |             |
|                         |                |             |
| Dispatcher's signature: | Date:          |             |
|                         |                |             |
| Time out:               | Time in:       | Total       |
| time:                   | Mileage out:   | Mileage in: |
|                         | Total miles:   | Actual      |
| no. passengers:         |                |             |
|                         | Remarks:       |             |
|                         |                |             |

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ Driver's signature: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_ Date: \_\_\_\_\_ Pre trip  
mechanical check completed (for overnight trips or trips exceeding \_\_\_\_\_ miles):  
Technician's signature: \_\_\_\_\_ Date: \_\_\_\_\_

## ~~INSTRUCTIONS FOR CONDUCTING EMERGENCY EXIT DRILLS~~

Due to the increased number of students being transported and the increased number of accidents on the highways, there is an urgent need to instruct students on how to properly vacate a school bus in case of an emergency. It is possible for students to block the emergency door if all are trying to get out at the same time. Also, there is a possibility of danger when students jump from the rear emergency door exit.

To avoid these situations, schools should organize and conduct emergency exit drills for all students who ride the school bus, even occasionally.

### A. Reasons for actual emergency evacuations:

- 1.— Fire or danger of fire. Being near an existing fire and unable to move the bus, or being near the presence of gasoline or other combustible material is considered dangerous, and students should be evacuated. The bus should be stopped and evacuated immediately if the engine or any portion of the bus is on fire. Students should be moved to a safe place 100 feet or more from the bus and instructed to remain there until the driver has determined that the danger has passed.
- 2.— Unsafe position. When the bus is stopped because of an accident, mechanical failure, road conditions or human failure, the driver must determine immediately whether it is safer for students to remain in or to evacuate the bus.
- 3.— Mandatory evacuations. The driver must evacuate the bus when the following situations arise:
  - a.— Fire or threat of fire is apparent.
  - b.— The final stopping point is in the path of a train or is adjacent to railroad tracks.
  - c.— The stopped position of the bus may change and increase the danger (e.g., a bus comes to rest near a body of water or at a precipice where it could still move and go into the water or over a cliff). The driver should be certain that the evacuation is carried out in a manner which affords maximum safety for the students.
  - d.— The stopped position of the bus is such that there is danger of collision.
- 4.— Sight distance. In normal traffic conditions, the bus should be visible for a distance of 300 feet or more. A position over a hill or around a curve, where such visibility does not exist, should be considered reason for evacuation.

**B. Important factors pertaining to school bus evacuation drills:**

5. ~~Safety of students is of the utmost importance and must first be considered.~~
6. ~~All drills should be supervised by the principal or by persons assigned to act in a supervisory capacity.~~
7. ~~The bus driver is responsible for the safety of the students. When the driver is incapacitated and unable to direct the evacuation, school patrol members, appointed students or adult attendants should be authorized to direct these drills. It is important to have~~ **REGULAR SUBSTITUTES AVAILABLE.**
8. ~~IF OPERABLE, THE SCHOOL BUS ALTERNATELY FLASHING SIGNAL LAMPS (RED TRAFFIC CONTROL LAMPS) MUST BE ACTIVATED AND SIDE STOP ARM EXTENDED TO ALERT ONCOMING TRAFFIC.~~
9. ~~Students appointed to direct evacuation drills should possess the following qualifications: Maturity and live near the end of the bus~~

route.

5. Passengers should receive instruction on how to:
  - a. Turn off ignition switch/shut down engine;
  - b. Set emergency brake;
  - c. Summon help when and where needed;
  - d. Use kick-out windows or emergency escape exits;
  - e. Set warning devices;
  - f. Open and close doors and account for all students passing the station;
  - g. Help small students off the bus;
  - h. Perform other assignments; and
  - i. Use of electronic voice equipment to summon help.
6. School bus driver and attendant should be active participants.
7. Drills should be scheduled in a manner similar to fire drills held regularly in schools. They should be held more often during fall and spring months and conducted when the bus arrives at the school building with the students.
8. Drills should be restricted to school property and conducted under the supervision of school officials.
9. Types of drills should be varied.
10. Driver should stay in bus during evacuation drill. He/she must set the parking brake, turn the engine off and place the manual transmission in gear.
11. Students should not be permitted to take lunch boxes, books, etc., with them when they leave the bus. (The objectives are to get students off safely in the shortest time possible and in an orderly fashion.)
12. Students should travel a distance of at least 100 feet from the bus in an emergency drill and remain there until given further directions.
13. All students should participate in the drill, including those who ride only on special trips.
14. Each student should be instructed in proper safety precautions.
15. Students should be instructed in how and where to obtain assistance in emergencies. Written instructions and telephone numbers should be posted in the bus.
16. Sample drill formats:
  - a. Everyone exits through the front entrance doors and emergency door configurations.
  - b. Everyone exits through the rear-most emergency door(s).
  - c. Front half exits through the front door and rear half exits through the rear-most door.
  - d. Other emergency exits (e.g., windows, hatches) are included in drills.
17. All rear-engine buses are equipped with a left side emergency exit door in lieu of a rear emergency door. This exit should also be utilized for evacuation drills.
18. Some states also require side emergency exits in addition to rear emergency doors.
19. Students should be familiar with the operation of emergency windows (both side and rear) and roof hatches. All exits should be opened by students during evacuation drills to ensure the students' ability to operate such devices.
20. All school bus drivers shall ensure the students assigned to their buses are familiar with the emergency exit configuration of their assigned bus.
21. Identification of seat rows and positions similar to airline seating is recommended (i.e., left front seat 1, a, b, c, right front seat 1, d, e, f, etc.)
22. Education staff and coaches should be trained regarding safe travel practices and procedures and should be required to participate in school bus evacuation drills.



## ~~SUGGESTED EVACUATION PROCEDURES FOR ACTIVITY TRIPS AND FIELD TRIPS~~

~~In order to ensure the safety of school bus passengers in an actual emergency, every school bus driver assigned to transport students on activity trips or field trips may assign an evacuation team prior to each trip. The team may consist of teachers, coaches, students or any other passenger. A roster should be provided to the driver, accounting for all passengers.~~

~~Passengers assigned to evacuation teams must be seated where they can effectively carry out their responsibilities in an emergency.~~

~~Each evacuation team will consist of at least the following:~~

- ~~1. A passenger assigned to set the parking brake, turn off the engine, turn on warning flashers and to call on the radio or other means and report the incident to the Transportation Department, in case the driver is unable to do so.~~
- ~~2. A passenger assigned to lead passengers to a safe location at least 100 feet from the bus and to take the first aid kit off the bus.~~
- ~~3. Two passengers assigned to stand outside the bus, next to the entrance door, to help students exit the bus and to take the fire extinguisher.~~
- ~~4. Two passengers assigned to stand outside the bus, next to the emergency exit door, to help students exit the bus.~~

~~In addition to assigning an evacuation team, the following information shall be discussed and/or demonstrated prior to each activity trip or field trip:~~

- ~~1. Location and use of the fire extinguisher;~~
- ~~2. Location of the first aid kit;~~
- ~~3. Location of the warning reflectors;~~
- ~~4. Location and use of all emergency exits;~~
- ~~5. How to shut off the engine and set the parking brake;~~
- ~~6. How to open the entrance door, to include, safety releases on manual, air or vacuum doors, if so equipped; and~~
- ~~7. Importance of passengers keeping aisles clear always and not blocking emergency exits.~~

~~THE DRIVER OF THIS TRIP DID ASSIGN AN EVACUATION TEAM AND EXPLAINED THE EMERGENCY PROCEDURES AND SAFE TRAVEL RULES TO OUR GROUP.~~

~~Sponsor's/trip leader's signature: \_\_\_\_\_ Date: \_\_\_\_\_~~

## ~~BUS USE FOR SCHOOL ACTIVITY TRIPS~~

### ~~General Provisions~~

#### ~~Pre-service driver training~~

~~In addition to successfully completing all pre-service training provided by their employer, school activity bus drivers shall complete at least a state-required course of instruction.~~

#### ~~In-service driver training~~

~~All school activity bus drivers shall receive the state-required amount of in-service training annually and shall be required to maintain a current first aid certificate with instruction in universal precautions.~~

#### ~~Hours of service~~

~~Driver shall comply with the provisions of CFR 49, Part 395.5.~~

### Specially equipped bus

School activity buses may be designed or modified in accordance with Federal Standards or the Americans with Disabilities Act requirements to transport passengers seated in wheelchairs.

### Vehicle condition

It shall be unlawful for the driver to drive a school activity bus that is not in safe operating condition or is not equipped, as required by all provisions of law. The driver is solely responsible for the vehicle condition.

### Pre-trip inspection

Prior to operation, the driver shall inspect each school activity bus to ascertain that it is in safe condition, it is equipped, as required by all provisions of law, and all equipment is in good working order. The inspection shall include, but is not limited to, the following items:

All required emergency equipment, as well as, first aid and body fluid cleanup kit(s), fire extinguisher(s), reflectors;

- a. All gauges, indicators and warning devices;
- b. Horn(s);
- c. Driver's seat and seat belts;
- d. All doors, door emergency releases, overhead hatches and windows;
- e. All seats, handrails and modesty panels;
- f. Interior and exterior lighting systems;
- g. All heating, cooling and ventilating systems;
- h. All glass and mirrors, including adjustment of mirrors;
- i. Windshield wipers and washers;
- j. All tires, wheels, rims and lug nuts;
- k. Wheelchair restraints, tie downs and loading devices (such as ramps and lifts);

### Brake system

- a. Air compressor governor cut-in and cut-out pressures;
- b. Static pressure for air loss;
- c. Applied brake pressure loss;
- d. Low air pressure warning devices;

### Emergency stopping systems

- a. Parking brake;
- b. Antiskid device (if equipped);
- c. Vacuum gauge (if equipped), ensuring it reads not less than 15 inches of mercury;
- d. Low vacuum warning device(s); and
- e. Brake pedal for brake adjustment.

\*(Note: Draining reservoirs in dual air systems is not required.)

### Daily report

At the completion of the driver's work or tour of duty, each driver shall submit a daily documented report to the employer indicating the condition of the vehicle and noting any defects found. Whether discovered by or reported to the driver, all vehicle defects and deficiencies likely to affect safe operation or cause mechanical breakdown of the school activity bus shall be listed, and a negative report shall indicate that no such conditions are present.

### Repairs

The driver shall not make any repairs of the bus or its equipment except necessary emergency

repairs on the road.

#### **EVACUATION PROCEDURES for ACTIVITY TRIPS AND FIELD TRIPS**

In order to ensure the safety of school bus passengers in an actual emergency, every school bus driver assigned to transport students on activity trips or field trips may assign an evacuation team prior to each trip. The team may consist of teachers, coaches, students or any other passenger. A roster should be provided to the driver, accounting for all passengers. Passengers assigned to evacuation teams must be seated where they can effectively carry out their responsibilities in an emergency. Each evacuation team will consist of at least the following:

- 1.—A passenger assigned to set the parking brake, turn off the engine, turn on warning flashers and to call on the radio or other means and report the incident to the Transportation Department, in case the driver is unable to do so.
- 2.—A passenger assigned to lead passengers to a safe location at least 100 feet from the bus and to take the first aid kit off the bus.
- 3.—Two passengers assigned to stand outside the bus, next to the entrance door, to help students exit the bus and to take the fire extinguisher.
- 4.—Two passengers assigned to stand outside the bus, next to each emergency exit door, to help students exit the bus.

In addition to assigning an evacuation team, the following information shall be discussed and/or demonstrated prior to each activity trip or field trip:

- a.—Location and use of the fire extinguisher;
- b.—Location of the first aid kit and body fluid kit;
- c.—Location of the warning reflectors
- d.—Location and use of all emergency exits;
- e.—How to shut off the engine and set the parking brake
- f.—How to open the entrance door, to include, safety releases on manual, air or vacuum doors, if so equipped; and
- g.—Importance of passengers keeping aisles clear always and not blocking emergency exits.

THE DRIVER OF THIS TRIP DID ASSIGN AN EVACUATION TEAM AND EXPLAINED THE EMERGENCY PROCEDURES AND SAFE TRAVEL RULES TO OUR GROUP.

Sponsor's/trip leader's signature: \_\_\_\_\_ Date: \_\_\_\_\_

#### **REFERENCE LOCATIONS**

The National Highway Traffic Safety Administration [NHTSA](#)  
National Association of State Directors of Pupil Transportation Services)-  
[NASDPTS](#) National Association of Pupil Transportation [NAPT](#)  
Montana Association of Pupil Transportation [MAPT](#)  
California Code of Regulations [CCR-CA](#)  
Operation Lifesaver [OL](#)  
Federal Motor Carrier Services Administration [FMCSA](#) [This](#)

**\*\*\*\*\*Time Certain at 2:00PM\*\*\*\*\***

**❖ JOINT MACIE MEETING AND TRIBAL  
CONSULTATION – (Items 14-17)**

**Julia Maxwell**

**ITEM 14**

**MACIE REPORT**

**Jordann Lankford Forster**



MONTANA ADVISORY COUNCIL ON INDIAN EDUCATION  
ADVISORY TO THE BOARD OF PUBLIC EDUCATION AND  
SUPERINTENDENT OF PUBLIC INSTRUCTION

**Montana Board of Public Education**  
**MACIE Summary**  
July 2026

**Presentation**

MACIE Report

**Presenter**

Jordann Lankford Forster

**Position Title**

MACIE Chair

**Overview**

The purpose of MACIE is to provide recommendations and guidance to the Board of Public Education and the Office of Public Instruction on initiatives and actions aimed at increasing American Indian student achievement. As your advisory board, and partner in American Indian education improvement, we offer the following report:

**Related Issue(s)**

July MACIE Meeting

**Recommendations**

None

**ITEM 15**

**INDIAN EDUCATION FOR ALL REPORT**

**Christy Mock-Stutz  
Dr. Brooke Gondara**



# Montana Board of Public Education Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                  |
|------------------------------|--------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Indian Education for All Report                                                                  |
| <b>Presenter</b>             | Christy Mock-Stutz and Dr. Brooke Gondara                                                        |
| <b>Position Title</b>        | Assistant Chief Program Officer and Director of Indian Education<br>Office of Public Instruction |
| <b>Overview</b>              | Indian Education for All Report                                                                  |
| <b>Requested Decision(s)</b> | Information Item                                                                                 |
| <b>Related Issue(s)</b>      | N/A                                                                                              |
| <b>Recommendation(s)</b>     | N/A                                                                                              |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
**opi.mt.gov**



## **Indian Education for All BPE Report July 2026**

Indian Education for All (IEFA) is a landmark provision in the Montana Constitution that “recognizes the distinct and unique cultural heritage of the American Indians and is committed in its educational goals to the preservation of their cultural integrity.” To support this provision, § 20-9-329, MCA, requires school districts to submit reports to ensure IEFA funds were properly spent on curriculum development of an American Indian studies program, providing curriculum and materials to students for the program, and providing training to teachers about the program's curriculum and materials. The Administrative Rules of Montana require schools and districts to integrate IEFA as part of their educational programming, curriculum reviews, and accreditation. Additionally, the OPI collects data that provides important information to the agency regarding IEFA integration in schools, and IEFA funding expenditures. Recent updates to § 20-1-503(6)(a), MCA, in the 2025 session of the Montana Legislature, required the Office of Public Instruction to create an online portal to receive feedback, respond to the feedback, and share outcomes.

### **Indian Education for All Implementation**

#### **Professional Learning Opportunities to Build Educator Capacity**

- IEFA staff worked to support schools based upon the new ISAP data to provide relevant support based on the ISAP scores indicated during last year's accreditation process.
- IEFA on-line supports include webinars featuring cultural presenters from MT tribes.
- Approximately 84 in-person and virtual presentations during the 25-26 school year for over 1100 teachers and students.
- **IEFA Recorded Webinars** (July 2025 – June 2026) – 442 webinar submissions for Professional Development Units
- Teacher Learning Hub courses – **The Introduction to IEFA** course has had approximately 10,000 teachers complete it since 2016, and from Jan 2025 to June 2025 – 855 teachers completed the course.
- Partnered with Native Film Club and the Big Sky Film Festival, reaching 1,579 students in 23 schools through Native American documentary film screenings.
- The annual **IEFA Best Practices Conference** was held at East Helena High School. The 2026 conference brought together over 240 attendees. The event featured 53 workshops, including a special two-hour, place-based session at the Montana Heritage Center, sponsored by the Montana Historical Society. Teachers enjoyed a dynamic lineup of keynote speakers, interactive workshops, museum tours, and networking opportunities.

#### **Curriculum Resource Development:**

- 60 Social Studies lessons developed.
- 20 English Language Arts companion lessons for books.
- 19 Math lessons developed.
- 25 Science lessons developed.

- 45 Videos produced.
- Ongoing creation of new IEFA lesson plans in collaboration with teachers and tribes.

#### IEFA presentations in schools since July 2025:

Box Elder, Polson, Hysham, Garfield Co. Schools, Savage, Deer Lodge, Kalispell, Reed Point, Helena, Drummond, Anaconda, Corvallis, Big Fork, Lame Deer, Pine Creek, Hardin, Lolo, Cardwell, Chester, Nashua, Amsterdam, Gardiner, Shields Valley Schools, Miles City, Sheridan, Whitefish, Trego, Missoula, Helena, Billings

#### IEFA Feedback Portal

Per § 20-1-503, MCA, the IEFA Feedback Portal opened in August of 2025. The purpose of the portal is to provide transparency and an opportunity for all stakeholders to provide feedback on the implementation of IEFA in schools. As of June 30, 2026, there were over 150 responses from community members, educators, parents, and administrators. The IEFA team responded to each submission to follow up on the feedback. At every presentation and professional learning opportunity, the IEFA team shares the link to this portal. This is also shared in OPI's monthly newsletter, The Current, and posted online.

#### Accreditation Reports- Updated IEFA rubric

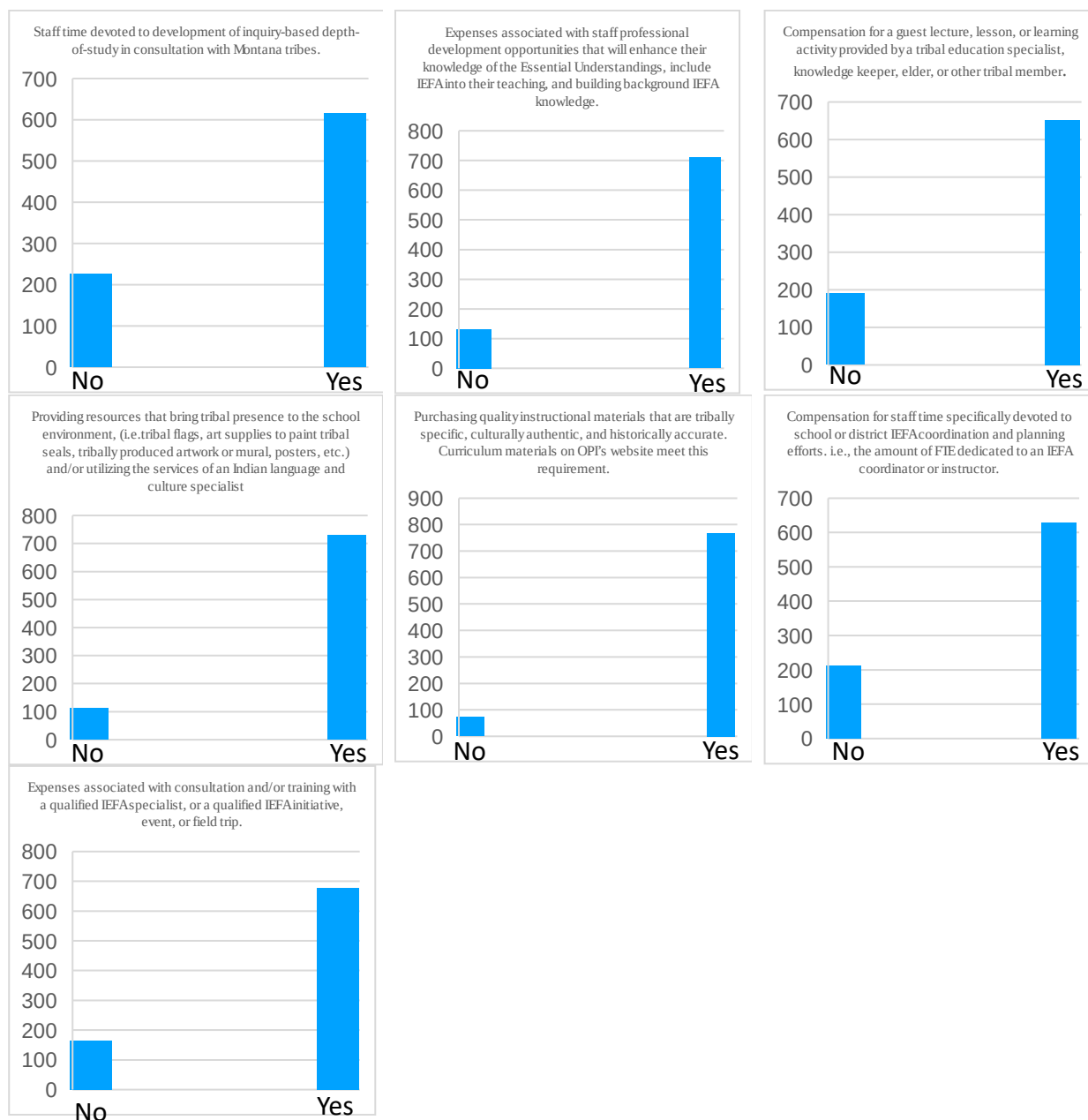
The FY 2027-2029 Criterion Reference Guide for Accreditation has an updated district rubric for IEFA (see the chart below). You may find the completed Criterion Reference Guide on OPI's website.

| Standard: Academic Requirements – ON CYCLE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                       |                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| P. Indian Education For All                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Deficiency (0)                                                                                                                                        | Advice (1)                                                                                     | Regular MD (2)                                                                                                                                                                                                                                                                                                                                                                                                         | Regular (3)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <p><i>Guiding Question:</i></p> <p>Does the district have an Indian Education for All (IEFA) policy, student work samples or evidence of student participation from each grade-band that includes integration of the history, contemporary portrayals, and contributions of American Indians, with an emphasis on Montana Indians, for all students, across all content areas, and in-service training related to IEFA?</p> <p><a href="#">ARM 10.55.901 (1)</a><br/> <a href="#">ARM 10.55.902 (1)</a><br/> <a href="#">ARM 10.55.904 (1)</a><br/> <a href="#">ARM 10.55.1003 2(a-i)</a><br/> <a href="#">MCA 20-1-501</a><br/> <a href="#">MCA 20-1-502</a><br/> <a href="#">MCA 20-1-503</a></p> | <input type="checkbox"/> District has <b>no</b> evidence that the constitutionally declared policy for Indian Education for All (IEFA) is implemented | <p><b>The district provided evidence of:</b></p> <input type="checkbox"/> District IEFA policy | <p><b>The district provided evidence of:</b></p> <input type="checkbox"/> District IEFA policy<br><b>AND</b><br><input type="checkbox"/> Student IEFA work samples or evidence of student participation from each grade-band that includes integration of the history, contemporary portrayals, and contributions of American Indians, with an emphasis on Montana Indians, for all students, across all content areas | <p><b>The district provided evidence of:</b></p> <input type="checkbox"/> District IEFA policy<br><b>AND</b><br><input type="checkbox"/> Student IEFA work samples or evidence of student participation from each grade-band that includes integration of the history, contemporary portrayals, and contributions of American Indians, with an emphasis on Montana Indians, for all students, across all content areas<br><b>AND</b><br><input type="checkbox"/> IEFA-related in-service training that was developed and conducted in cooperation with tribal education departments, tribal community colleges, or other recognized Indian education resource specialists |

## Fiscal Reports

There are two ways schools report the accurate use of their IEFA funds to the OPI

### Part 1: District-reported assurances regarding expenditures - reported in February 2026



**Part 2: Trustee Financial Summary (TFS) is due September 15.** This report shows the funds a school received, as well as the expenditures for the IEFA funding amount. (IEFA Budget report per district starts on page 7 of this report.)

- Recording funds received: Fund (01) General Fund, Revenue code: 3113
- Recording expenditures: Fund (01) General Fund, Program code: 365
- TFS, once finalized, are available on OPI's website for each district.

## FY2027 IEFA Funding by District

|                                              | Entitlement | District Count |
|----------------------------------------------|-------------|----------------|
| IEA payment unadjusted                       | \$3,997,258 | 390            |
| Amount reduced from non-fiscal element       | -           | -              |
| Partial Reduction districts                  | \$82,413    | 30             |
| Full reduction from no reported expenditures | \$15,436    | 8              |
| TOTAL Reduction                              | \$97,849    | 38             |

| LE   | LE Name               | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|-----------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0003 | Grant Elem            | EL       | 2027        | 7      | 182.91          | Y                      | 172.41         | -                  | 182.91           | -             |
| 0009 | Lima K-12 Schools     | K12      | 2027        | 49     | 1,280.37        | Y                      | 1,551.69       | 173.25             | 1,378.44         | -             |
| 0386 | Kester Elem           | EL       | 2027        | 4      | 104.52          | Y                      | 100.00         | -                  | 104.52           | -             |
| 0420 | Drummond H S          | HS       | 2027        | 77     | 2,012.01        | Y                      | 1,797.99       | -                  | 2,012.01         | -             |
| 0453 | Whitehall Elem        | EL       | 2027        | 310    | 8,100.30        | Y                      | 8,004.75       | -                  | 8,100.30         | -             |
| 0498 | Auchard Creek Elem    | EL       | 2027        | 20     | 522.60          | Y                      | 418.71         | -                  | 522.60           | -             |
| 0679 | Valier Elem           | EL       | 2027        | 105    | 2,743.65        | Y                      | 2,906.34       | -                  | 2,743.65         | -             |
| 0853 | Fishtail Elem         | EL       | 2027        | 15     | 391.95          | Y                      | 344.82         | -                  | 391.95           | -             |
| 0491 | Trinity Elem          | EL       | 2027        | 44     | 1,149.72        | Y                      | 1,059.09       | 1,058.89           | 0.20             | 1,149.52      |
| 0520 | Troy H S              | HS       | 2027        | 135    | 3,527.55        | Y                      | 3,448.20       | 3,448.00           | 0.20             | 3,527.35      |
| 0216 | Lindsay Elem          | EL       | 2027        | 8      | 209.04          | Y                      | 221.67         | 221.26             | 0.41             | 208.63        |
| 0331 | Bigfork H S           | HS       | 2027        | 346    | 9,040.98        | Y                      | 8,792.91       | 8,792.22           | 0.69             | 9,040.29      |
| 1218 | Ayers Elem            | EL       | 2027        | 16     | 418.08          | Y                      | 270.93         | 239.10             | 31.83            | 386.25        |
| 0749 | Brorson Elem          | EL       | 2027        | 10     | 261.30          | Y                      | 147.78         | 75.00              | 72.78            | 188.52        |
| 0976 | Morin Elem            | EL       | 2027        | 38     | 992.94          | Y                      | 960.57         | 873.85             | 86.72            | 906.22        |
| 0738 | Victor K-12 Schools   | K12      | 2027        | 272    | 7,107.36        | Y                      | 6,354.54       | 6,252.83           | 101.71           | 7,005.65      |
| 1234 | North Star HS         | HS       | 2027        | 56     | 1,463.28        | Y                      | 1,453.17       | 1,337.44           | 115.73           | 1,347.55      |
| 0857 | Nye Elem              | EL       | 2027        | 5      | 130.65          | Y                      | 172.41         | 49.43              | 122.98           | 7.67          |
| 0592 | DeSmet Elem           | EL       | 2027        | 137    | 3,579.81        | Y                      | 3,300.42       | 3,160.96           | 139.46           | 3,440.35      |
| 0642 | Winnett K-12 Schools  | K12      | 2027        | 71     | 1,855.23        | Y                      | 1,699.47       | 1,553.65           | 145.82           | 1,709.41      |
| 0748 | Savage H S            | HS       | 2027        | 45     | 1,175.85        | Y                      | 911.31         | 758.22             | 153.09           | 1,022.76      |
| 0411 | Lavina K-12 Schools   | K12      | 2027        | 83     | 2,168.79        | Y                      | 1,896.51       | 1,575.00           | 321.51           | 1,847.28      |
| 0280 | Roy K-12 Schools      | K12      | 2027        | 25     | 653.25          | Y                      | 665.01         | 298.14             | 366.87           | 286.38        |
| 0357 | Springhill Elem       | EL       | 2027        | 16     | 418.08          | Y                      | 418.71         | 15.99              | 402.72           | 15.36         |
| 0989 | Independent Elem      | EL       | 2027        | 311    | 8,126.43        | Y                      | 7,610.67       | 7,189.48           | 421.19           | 7,705.24      |
| 0308 | Fair-Mont-Egan Elem   | EL       | 2027        | 151    | 3,945.63        | Y                      | 3,522.09       | 3,054.40           | 467.69           | 3,477.94      |
| 1233 | North Star Elem       | EL       | 2027        | 115    | 3,004.95        | Y                      | 3,645.24       | 3,145.12           | 500.12           | 2,504.83      |
| 0741 | Lone Rock Elem        | EL       | 2027        | 296    | 7,734.48        | Y                      | 6,674.73       | 6,100.43           | 574.30           | 7,160.18      |
| 0464 | Stanford K-12 Schools | K12      | 2027        | 102    | 2,665.26        | Y                      | 2,586.15       | 1,732.43           | 853.72           | 1,811.54      |
| 0747 | Savage Elem           | EL       | 2027        | 92     | 2,403.96        | Y                      | 2,389.11       | 1,500.00           | 889.11           | 1,514.85      |
| 0330 | Bigfork Elem          | EL       | 2027        | 610    | 15,939.30       | Y                      | 15,640.05      | 14,610.96          | 1,029.09         | 14,910.21     |
| 0740 | Darby K-12 Schools    | K12      | 2027        | 348    | 9,093.24        | Y                      | 8,645.13       | 7,504.25           | 1,140.88         | 7,952.36      |
| 0309 | Swan River Elem       | EL       | 2027        | 168    | 4,389.84        | Y                      | 4,802.85       | 3,241.72           | 1,561.13         | 2,828.71      |

| LE   | LE Name                  | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|--------------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0419 | Drummond Elem            | EL       | 2027        | 113    | 2,952.69        | Y                      | 2,980.23       | 966.62             | 2,013.61         | 939.08        |
| 0613 | Park H S                 | HS       | 2027        | 438    | 11,444.94       | Y                      | 11,009.61      | 3,453.61           | 7,556.00         | 3,888.94      |
| 0313 | Columbia Falls H S       | HS       | 2027        | 690    | 18,029.70       | Y                      | 17,364.15      | 4,775.55           | 12,588.60        | 5,441.10      |
| 0612 | Livingston Elem          | EL       | 2027        | 805    | 21,034.65       | Y                      | 21,255.69      | 2,028.96           | 19,226.73        | 1,807.92      |
| 0312 | Columbia Falls Elem      | EL       | 2027        | 1565   | 40,893.45       | Y                      | 39,900.60      | 8,372.41           | 31,528.19        | 9,365.26      |
| 0394 | Ross Elem                | EL       | 2027        | 3      | 100.00          | Y                      | 100.00         | 100.00             | -                | 100.00        |
| 0014 | Jackson Elem             | EL       | 2027        | 4      | 104.52          | Y                      | 147.78         | 147.78             | -                | 104.52        |
| 0020 | Spring Creek Elem        | EL       | 2027        | 4      | 104.52          | Y                      | 197.04         | 197.04             | -                | 104.52        |
| 0288 | Spring Creek Colony Elem | EL       | 2027        | 4      | 104.52          | Y                      | 100.00         | 100.00             | -                | 104.52        |
| 1216 | North Harlem Colony Elem | EL       | 2027        | 4      | 104.52          | Y                      | 197.04         | 394.98             | -                | 104.52        |
| 0617 | Cooke City Elem          | EL       | 2027        | 5      | 130.65          | Y                      | 172.41         | 172.41             | -                | 130.65        |
| 0949 | Judith Gap H S           | HS       | 2027        | 5      | 130.65          | Y                      | 123.15         | 123.15             | -                | 130.65        |
| 0007 | Wise River Elem          | EL       | 2027        | 6      | 156.78          | Y                      | 172.41         | 337.87             | -                | 156.78        |
| 0385 | Pine Grove Elem          | EL       | 2027        | 6      | 156.78          | Y                      | 172.41         | 172.41             | -                | 156.78        |
| 0012 | Polaris Elem             | EL       | 2027        | 7      | 182.91          | Y                      | 197.04         | 197.04             | -                | 182.91        |
| 0171 | Benton Lake Elem         | EL       | 2027        | 7      | 182.91          | Y                      | 221.67         | 389.12             | -                | 182.91        |
| 0177 | Trail Creek Elem         | EL       | 2027        | 7      | 182.91          | Y                      | 147.78         | 147.78             | -                | 182.91        |
| 0189 | S Y Elem                 | EL       | 2027        | 8      | 209.04          | Y                      | 197.04         | 213.00             | -                | 209.04        |
| 0215 | Bloomfield Elem          | EL       | 2027        | 8      | 209.04          | Y                      | 246.30         | 246.30             | -                | 209.04        |
| 0272 | King Colony Elem         | EL       | 2027        | 8      | 209.04          | Y                      | 221.67         | 221.67             | -                | 209.04        |
| 0355 | Willow Creek H S         | HS       | 2027        | 8      | 209.04          | Y                      | 246.30         | 264.90             | -                | 209.04        |
| 0455 | Basin Elem               | EL       | 2027        | 8      | 209.04          | Y                      | 443.34         | 443.34             | -                | 209.04        |
| 0486 | Swan Lake-Salmon Elem    | EL       | 2027        | 8      | 209.04          | Y                      | 123.15         | 227.79             | -                | 209.04        |
| 0872 | Greycliff Elem           | EL       | 2027        | 8      | 209.04          | Y                      | 123.15         | 146.20             | -                | 209.04        |
| 0096 | Alzada Elem              | EL       | 2027        | 9      | 235.17          | Y                      | 320.19         | 320.19             | -                | 235.17        |
| 0370 | Malmborg Elem            | EL       | 2027        | 9      | 235.17          | Y                      | 221.67         | 229.66             | -                | 235.17        |
| 0533 | Yaak Elem                | EL       | 2027        | 9      | 235.17          | Y                      | 197.04         | 422.60             | -                | 235.17        |
| 0010 | Wisdom Elem              | EL       | 2027        | 10     | 261.30          | Y                      | 295.56         | 302.01             | -                | 261.30        |
| 0032 | Cleveland Elem           | EL       | 2027        | 10     | 261.30          | Y                      | 197.04         | 197.04             | -                | 261.30        |
| 0325 | Pleasant Valley Elem     | EL       | 2027        | 10     | 261.30          | Y                      | 270.93         | 270.93             | -                | 261.30        |
| 0424 | Davey Elem               | EL       | 2027        | 10     | 261.30          | Y                      | 394.08         | 394.08             | -                | 261.30        |
| 0495 | Wolf Creek Elem          | EL       | 2027        | 10     | 261.30          | Y                      | 320.19         | 320.19             | -                | 261.30        |
| 0789 | Birney Elem              | EL       | 2027        | 10     | 261.30          | Y                      | 221.67         | 221.67             | -                | 261.30        |
| 0875 | McLeod Elem              | EL       | 2027        | 10     | 261.30          | Y                      | 197.04         | 197.24             | -                | 261.30        |
| 1231 | Luther Elem              | EL       | 2027        | 10     | 261.30          | Y                      | 246.30         | 400.00             | -                | 261.30        |
| 0048 | Bear Paw Elem            | EL       | 2027        | 11     | 287.43          | Y                      | 295.56         | 295.56             | -                | 287.43        |
| 0078 | Hawks Home Elem          | EL       | 2027        | 11     | 287.43          | Y                      | 418.71         | 511.28             | -                | 287.43        |
| 0387 | Cohagen Elem             | EL       | 2027        | 11     | 287.43          | Y                      | 369.45         | 375.00             | -                | 287.43        |
| 0692 | Biddle Elem              | EL       | 2027        | 11     | 287.43          | Y                      | 246.30         | 677.00             | -                | 287.43        |
| 0264 | Deerfield Elem           | EL       | 2027        | 12     | 313.56          | Y                      | 369.45         | 369.45             | -                | 313.56        |
| 0594 | Sunset Elem              | EL       | 2027        | 12     | 313.56          | Y                      | 320.19         | 623.97             | -                | 313.56        |
| 0898 | Pendroy Elem             | EL       | 2027        | 12     | 313.56          | Y                      | 295.56         | 295.56             | -                | 313.56        |
| 0717 | Helmville Elem           | EL       | 2027        | 13     | 339.69          | Y                      | 369.45         | 485.19             | -                | 339.69        |
| 0843 | Divide Elem              | EL       | 2027        | 13     | 339.69          | Y                      | 295.56         | 895.00             | -                | 339.69        |
| 0657 | Saco H S                 | HS       | 2027        | 14     | 365.82          | Y                      | 369.45         | 588.36             | -                | 365.82        |
| 0161 | Knees Elem               | EL       | 2027        | 15     | 391.95          | Y                      | 246.30         | 300.00             | -                | 391.95        |
| 0536 | Alder Elem               | EL       | 2027        | 15     | 391.95          | Y                      | 394.08         | 394.08             | -                | 391.95        |



| LE   | LE Name                 | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|-------------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0896 | Golden Ridge Elem       | EL       | 2027        | 15     | 391.95          | Y                      | 837.42         | 4,510.82           | -                | 391.95        |
| 1222 | Mountain View Elem      | EL       | 2027        | 15     | 391.95          | Y                      | 295.56         | 306.44             | -                | 391.95        |
| 1224 | Liberty Elem            | EL       | 2027        | 15     | 391.95          | Y                      | 935.94         | 935.94             | -                | 391.95        |
| 0282 | Denton H S              | HS       | 2027        | 17     | 444.21          | Y                      | 270.93         | 270.93             | -                | 444.21        |
| 0362 | Pass Creek Elem         | EL       | 2027        | 17     | 444.21          | Y                      | 344.82         | 398.85             | -                | 444.21        |
| 0534 | Trego Elem              | EL       | 2027        | 18     | 470.34          | Y                      | 566.49         | 640.54             | -                | 470.34        |
| 0718 | Garrison Elem           | EL       | 2027        | 18     | 470.34          | Y                      | 443.34         | 450.00             | -                | 470.34        |
| 0868 | Melville Elem           | EL       | 2027        | 18     | 470.34          | Y                      | 763.53         | 763.53             | -                | 470.34        |
| 1217 | Gildford Colony Elem    | EL       | 2027        | 18     | 470.34          | Y                      | 369.45         | 369.45             | -                | 470.34        |
| 0530 | McCormick Elem          | EL       | 2027        | 19     | 496.47          | Y                      | 443.34         | 443.34             | -                | 496.47        |
| 0859 | Rapelje H S             | HS       | 2027        | 19     | 496.47          | Y                      | 517.23         | 517.23             | -                | 496.47        |
| 0933 | Hinsdale H S            | HS       | 2027        | 19     | 496.47          | Y                      | 615.75         | 615.75             | -                | 496.47        |
| 0715 | Ovando Elem             | EL       | 2027        | 20     | 522.60          | Y                      | 492.60         | 543.64             | -                | 522.60        |
| 0359 | Cottonwood Elem         | EL       | 2027        | 21     | 548.73          | Y                      | 492.60         | 492.60             | -                | 548.73        |
| 0445 | Cottonwood Elem         | EL       | 2027        | 21     | 548.73          | Y                      | 591.12         | 591.12             | -                | 548.73        |
| 0851 | Reed Point H S          | HS       | 2027        | 21     | 548.73          | Y                      | 467.97         | 467.97             | -                | 548.73        |
| 0015 | Reichle Elem            | EL       | 2027        | 22     | 574.86          | Y                      | 443.34         | 500.00             | -                | 574.86        |
| 0045 | Turner H S              | HS       | 2027        | 22     | 574.86          | Y                      | 591.12         | 591.12             | -                | 574.86        |
| 1193 | Deer Creek Elem         | EL       | 2027        | 22     | 574.86          | Y                      | 467.97         | 467.97             | -                | 574.86        |
| 0418 | Hall Elem               | EL       | 2027        | 23     | 600.99          | Y                      | 541.86         | 767.00             | -                | 600.99        |
| 0948 | Judith Gap Elem         | EL       | 2027        | 23     | 600.99          | Y                      | 591.12         | 591.12             | -                | 600.99        |
| 0034 | Zurich Elem             | EL       | 2027        | 24     | 627.12          | Y                      | 738.90         | 738.90             | -                | 627.12        |
| 0889 | Bynum Elem              | EL       | 2027        | 24     | 627.12          | Y                      | 517.23         | 520.17             | -                | 627.12        |
| 0228 | Richey H S              | HS       | 2027        | 25     | 653.25          | Y                      | 689.64         | 690.00             | -                | 653.25        |
| 0928 | Frazer H S              | HS       | 2027        | 26     | 679.38          | Y                      | 788.16         | 1,945.86           | -                | 679.38        |
| 0720 | Avon Elem               | EL       | 2027        | 28     | 731.64          | Y                      | 689.64         | 700.00             | -                | 731.64        |
| 0269 | Grass Range H S         | HS       | 2027        | 29     | 757.77          | Y                      | 738.90         | 980.90             | -                | 757.77        |
| 0719 | Elliston Elem           | EL       | 2027        | 29     | 757.77          | Y                      | 591.12         | 600.00             | -                | 757.77        |
| 0274 | Moore H S               | HS       | 2027        | 31     | 810.03          | Y                      | 492.60         | 492.60             | -                | 810.03        |
| 0596 | Swan Valley Elem        | EL       | 2027        | 32     | 836.16          | Y                      | 812.79         | 812.79             | -                | 836.16        |
| 0807 | Trout Creek Elem        | EL       | 2027        | 32     | 836.16          | Y                      | 1,428.54       | 1,428.54           | -                | 836.16        |
| 0503 | Augusta H S             | HS       | 2027        | 33     | 862.29          | Y                      | 738.90         | 738.90             | -                | 862.29        |
| 0608 | Melstone H S            | HS       | 2027        | 33     | 862.29          | Y                      | 862.05         | 862.05             | -                | 862.29        |
| 0680 | Valier H S              | HS       | 2027        | 36     | 940.68          | Y                      | 1,059.09       | 3,178.47           | -                | 940.68        |
| 0935 | Opheim K-12 Schools     | K12      | 2027        | 36     | 940.68          | Y                      | 1,034.46       | 1,034.46           | -                | 940.68        |
| 0044 | Turner Elem             | EL       | 2027        | 37     | 966.81          | Y                      | 985.20         | 985.20             | -                | 966.81        |
| 0769 | Lambert H S             | HS       | 2027        | 37     | 966.81          | Y                      | 1,059.09       | 1,059.09           | -                | 966.81        |
| 0097 | Carter County H S       | HS       | 2027        | 38     | 992.94          | Y                      | 1,009.83       | 1,508.00           | -                | 992.94        |
| 0483 | Valley View Elem        | EL       | 2027        | 39     | 1,019.07        | Y                      | 862.05         | 1,016.15           | -                | 1,019.07      |
| 0684 | Miami Elem              | EL       | 2027        | 39     | 1,019.07        | Y                      | 985.20         | 985.20             | -                | 1,019.07      |
| 0787 | Froid H S               | HS       | 2027        | 39     | 1,019.07        | Y                      | 960.57         | 961.00             | -                | 1,019.07      |
| 0895 | Power H S               | HS       | 2027        | 39     | 1,019.07        | Y                      | 935.94         | 1,225.39           | -                | 1,019.07      |
| 0607 | Melstone Elem           | EL       | 2027        | 42     | 1,097.46        | Y                      | 1,083.72       | 1,083.72           | -                | 1,097.46      |
| 0663 | Whitewater K-12 Schools | K12      | 2027        | 42     | 1,097.46        | Y                      | 1,034.46       | 1,034.46           | -                | 1,097.46      |
| 0850 | Reed Point Elem         | EL       | 2027        | 42     | 1,097.46        | Y                      | 1,009.83       | 1,009.83           | -                | 1,097.46      |
| 1203 | Saco Elem               | EL       | 2027        | 42     | 1,097.46        | Y                      | 960.57         | 961.07             | -                | 1,097.46      |
| 0458 | Cardwell Elem           | EL       | 2027        | 43     | 1,123.59        | Y                      | 886.68         | 886.68             | -                | 1,123.59      |

| LE   | LE Name                     | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|-----------------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0473 | Geyser K-12 Schools         | K12      | 2027        | 44     | 1,149.72        | Y                      | 960.57         | 1,476.15           | -                | 1,149.72      |
| 0566 | Vida Elem                   | EL       | 2027        | 44     | 1,149.72        | Y                      | 1,132.98       | 1,132.98           | -                | 1,149.72      |
| 0620 | Pine Creek Elem             | EL       | 2027        | 44     | 1,149.72        | Y                      | 1,009.83       | 1,629.46           | -                | 1,149.72      |
| 0932 | Hinsdale Elem               | EL       | 2027        | 44     | 1,149.72        | Y                      | 911.31         | 911.31             | -                | 1,149.72      |
| 0281 | Denton Elem                 | EL       | 2027        | 45     | 1,175.85        | Y                      | 1,083.72       | 1,083.72           | -                | 1,175.85      |
| 0354 | Willow Creek Elem           | EL       | 2027        | 45     | 1,175.85        | Y                      | 1,182.24       | 1,182.24           | -                | 1,175.85      |
| 0404 | East Glacier Park Elem      | EL       | 2027        | 46     | 1,201.98        | Y                      | 1,477.80       | 1,477.80           | -                | 1,201.98      |
| 0941 | Lustre Elem                 | EL       | 2027        | 46     | 1,201.98        | Y                      | 1,256.13       | 1,256.13           | -                | 1,201.98      |
| 0671 | Dupuyer Elem                | EL       | 2027        | 48     | 1,254.24        | Y                      | 1,206.87       | 1,206.87           | -                | 1,254.24      |
| 0809 | Dixon Elem                  | EL       | 2027        | 49     | 1,280.37        | Y                      | 1,428.54       | 1,428.54           | -                | 1,280.37      |
| 0858 | Rapelje Elem                | EL       | 2027        | 49     | 1,280.37        | Y                      | 1,157.61       | 1,157.61           | -                | 1,280.37      |
| 0591 | Woodman Elem                | EL       | 2027        | 51     | 1,332.63        | Y                      | 1,157.61       | 1,367.59           | -                | 1,332.63      |
| 0783 | Brockton H S                | HS       | 2027        | 51     | 1,332.63        | Y                      | 1,379.28       | 23,598.65          | -                | 1,332.63      |
| 0786 | Froid Elem                  | EL       | 2027        | 52     | 1,358.76        | Y                      | 1,428.54       | 1,429.00           | -                | 1,358.76      |
| 0227 | Richey Elem                 | EL       | 2027        | 53     | 1,384.89        | Y                      | 1,206.87       | 1,207.00           | -                | 1,384.89      |
| 1196 | Yellowstone Academy Elem    | EL       | 2027        | 54     | 1,411.02        | Y                      | 1,403.91       | 1,500.00           | -                | 1,411.02      |
| 0187 | Kinsey Elem                 | EL       | 2027        | 55     | 1,437.15        | Y                      | 1,650.21       | 1,650.21           | -                | 1,437.15      |
| 0268 | Grass Range Elem            | EL       | 2027        | 56     | 1,463.28        | Y                      | 1,527.06       | 1,977.85           | -                | 1,463.28      |
| 1191 | Gardiner H S                | HS       | 2027        | 56     | 1,463.28        | Y                      | 1,330.02       | 1,330.02           | -                | 1,463.28      |
| 0173 | Kircher Elem                | EL       | 2027        | 57     | 1,489.41        | Y                      | 1,650.21       | 1,650.21           | -                | 1,489.41      |
| 0538 | Sheridan H S                | HS       | 2027        | 57     | 1,489.41        | Y                      | 1,576.32       | 1,576.84           | -                | 1,489.41      |
| 0812 | Noxon H S                   | HS       | 2027        | 57     | 1,489.41        | Y                      | 1,748.73       | 2,086.52           | -                | 1,489.41      |
| 0076 | Belfry K-12 Schools         | K12      | 2027        | 61     | 1,593.93        | Y                      | 1,551.69       | 1,552.00           | -                | 1,593.93      |
| 0273 | Moore Elem                  | EL       | 2027        | 62     | 1,620.06        | Y                      | 1,157.61       | 1,946.60           | -                | 1,620.06      |
| 1211 | Upper West Shore Elem       | EL       | 2027        | 62     | 1,620.06        | Y                      | 1,305.39       | 3,967.39           | -                | 1,620.06      |
| 1228 | Shields Valley H S          | HS       | 2027        | 63     | 1,646.19        | Y                      | 1,527.06       | 1,527.06           | -                | 1,646.19      |
| 1237 | Chester-Joplin-Inverness HS | HS       | 2027        | 63     | 1,646.19        | Y                      | 1,600.95       | 1,630.54           | -                | 1,646.19      |
| 0378 | Garfield County H S         | HS       | 2027        | 64     | 1,672.32        | Y                      | 1,477.80       | 1,477.80           | -                | 1,672.32      |
| 0407 | Ryegate K-12 Schools        | K12      | 2027        | 64     | 1,672.32        | Y                      | 1,502.43       | 1,502.43           | -                | 1,672.32      |
| 0894 | Power Elem                  | EL       | 2027        | 64     | 1,672.32        | Y                      | 1,945.77       | 1,945.77           | -                | 1,672.32      |
| 0819 | Westby K-12 Schools         | K12      | 2027        | 65     | 1,698.45        | Y                      | 1,403.91       | 1,418.39           | -                | 1,698.45      |
| 0367 | LaMotte Elem                | EL       | 2027        | 66     | 1,724.58        | Y                      | 1,453.17       | 1,601.97           | -                | 1,724.58      |
| 0795 | Rosebud K-12                | K12      | 2027        | 66     | 1,724.58        | Y                      | 1,379.28       | 1,379.28           | -                | 1,724.58      |
| 0529 | Fortine Elem                | EL       | 2027        | 67     | 1,750.71        | Y                      | 1,871.88       | 1,871.88           | -                | 1,750.71      |
| 0706 | Powder River Co Dist H S    | HS       | 2027        | 67     | 1,750.71        | Y                      | 1,847.25       | 2,000.00           | -                | 1,750.71      |
| 1215 | Arrowhead Elem              | EL       | 2027        | 68     | 1,776.84        | Y                      | 1,871.88       | 1,871.88           | -                | 1,776.84      |
| 0548 | Circle H S                  | HS       | 2027        | 70     | 1,829.10        | Y                      | 1,674.84       | 2,039.37           | -                | 1,829.10      |
| 1223 | West Glacier Elem           | EL       | 2027        | 70     | 1,829.10        | Y                      | 1,871.88       | 1,877.00           | -                | 1,829.10      |
| 1214 | Plenty Coups H S            | HS       | 2027        | 72     | 1,881.36        | Y                      | 1,527.06       | 1,527.06           | -                | 1,881.36      |
| 0927 | Frazer Elem                 | EL       | 2027        | 73     | 1,907.49        | Y                      | 1,748.73       | 2,000.00           | -                | 1,907.49      |
| 0987 | Pioneer Elem                | EL       | 2027        | 73     | 1,907.49        | Y                      | 2,118.18       | 2,780.93           | -                | 1,907.49      |
| 0021 | Pryor Elem                  | EL       | 2027        | 74     | 1,933.62        | Y                      | 1,945.77       | 1,945.77           | -                | 1,933.62      |
| 0154 | Geraldine K-12              | K12      | 2027        | 74     | 1,933.62        | Y                      | 1,674.84       | 1,674.84           | -                | 1,933.62      |
| 0072 | Fromberg K-12               | K12      | 2027        | 75     | 1,959.75        | Y                      | 2,610.78       | 2,610.78           | -                | 1,959.75      |
| 0543 | Harrison K-12 Schools       | K12      | 2027        | 75     | 1,959.75        | Y                      | 2,463.00       | 2,463.00           | -                | 1,959.75      |
| 0754 | Rau Elem                    | EL       | 2027        | 76     | 1,985.88        | Y                      | 1,847.25       | 2,331.25           | -                | 1,985.88      |

| LE   | LE Name                    | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|----------------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0768 | Lambert Elem               | EL       | 2027        | 77     | 2,012.01        | Y                      | 1,970.40       | 1,970.40           | -                | 2,012.01      |
| 1206 | Charlo H S                 | HS       | 2027        | 77     | 2,012.01        | Y                      | 2,093.55       | 2,093.55           | -                | 2,012.01      |
| 0105 | Centerville H S            | HS       | 2027        | 78     | 2,038.14        | Y                      | 1,970.40       | 2,573.50           | -                | 2,038.14      |
| 0862 | Absarokee H S              | HS       | 2027        | 78     | 2,038.14        | Y                      | 2,019.66       | 2,250.52           | -                | 2,038.14      |
| 0026 | Wyola Elem                 | EL       | 2027        | 79     | 2,064.27        | Y                      | 2,142.81       | 2,142.81           | -                | 2,064.27      |
| 0800 | Ashland Elem               | EL       | 2027        | 83     | 2,168.79        | Y                      | 2,068.92       | 2,068.92           | -                | 2,168.79      |
| 0778 | Culbertson H S             | HS       | 2027        | 85     | 2,221.05        | Y                      | 2,290.59       | 2,290.59           | -                | 2,221.05      |
| 0648 | Dodson K-12                | K12      | 2027        | 87     | 2,273.31        | Y                      | 2,364.48       | 2,364.48           | -                | 2,273.31      |
| 0900 | Greenfield Elem            | EL       | 2027        | 88     | 2,299.44        | Y                      | 2,142.81       | 2,142.81           | -                | 2,299.44      |
| 0589 | Potomac Elem               | EL       | 2027        | 91     | 2,377.83        | Y                      | 2,389.11       | 2,434.66           | -                | 2,377.83      |
| 0069 | Roberts K-12 Schools       | K12      | 2027        | 92     | 2,403.96        | Y                      | 2,906.34       | 2,906.34           | -                | 2,403.96      |
| 0822 | Medicine Lake K-12 Schools | K12      | 2027        | 92     | 2,403.96        | Y                      | 2,265.96       | 3,890.00           | -                | 2,403.96      |
| 0923 | Hysham K-12 Schools        | K12      | 2027        | 93     | 2,430.09        | Y                      | 2,044.29       | 2,044.30           | -                | 2,430.09      |
| 0316 | Creston Elem               | EL       | 2027        | 94     | 2,456.22        | Y                      | 2,881.71       | 3,924.79           | -                | 2,456.22      |
| 0782 | Brockton Elem              | EL       | 2027        | 94     | 2,456.22        | Y                      | 2,635.41       | 41,477.16          | -                | 2,456.22      |
| 0118 | Simms H S                  | HS       | 2027        | 95     | 2,482.35        | Y                      | 2,660.04       | 2,660.04           | -                | 2,482.35      |
| 0426 | Box Elder H S              | HS       | 2027        | 96     | 2,508.48        | Y                      | 2,635.41       | 2,635.41           | -                | 2,508.48      |
| 0614 | Gardiner Elem              | EL       | 2027        | 97     | 2,534.61        | Y                      | 2,315.22       | 2,315.22           | -                | 2,534.61      |
| 0751 | Fairview H S               | HS       | 2027        | 97     | 2,534.61        | Y                      | 2,906.34       | 2,906.34           | -                | 2,534.61      |
| 0975 | Custer K-12 Schools        | K12      | 2027        | 100    | 2,613.00        | Y                      | 2,610.78       | 15,047.17          | -                | 2,613.00      |
| 0811 | Noxon Elem                 | EL       | 2027        | 101    | 2,639.13        | Y                      | 2,586.15       | 2,586.15           | -                | 2,639.13      |
| 0342 | Olney-Bissell Elem         | EL       | 2027        | 102    | 2,665.26        | Y                      | 2,561.52       | 2,561.52           | -                | 2,665.26      |
| 0113 | Belt H S                   | HS       | 2027        | 103    | 2,691.39        | Y                      | 2,512.26       | 2,512.26           | -                | 2,691.39      |
| 0937 | Nashua K-12 Schools        | K12      | 2027        | 103    | 2,691.39        | Y                      | 2,733.93       | 2,733.94           | -                | 2,691.39      |
| 0791 | Forsyth H S                | HS       | 2027        | 105    | 2,743.65        | Y                      | 2,561.52       | 2,561.52           | -                | 2,743.65      |
| 0087 | Ekalaka Elem               | EL       | 2027        | 107    | 2,795.91        | Y                      | 2,339.85       | 2,390.00           | -                | 2,795.91      |
| 0377 | Jordan Elem                | EL       | 2027        | 107    | 2,795.91        | Y                      | 2,758.56       | 2,758.56           | -                | 2,795.91      |
| 0256 | Plevna K-12 Schools        | K12      | 2027        | 108    | 2,822.04        | Y                      | 2,660.04       | 2,660.04           | -                | 2,822.04      |
| 0146 | Highwood K-12              | K12      | 2027        | 109    | 2,848.17        | Y                      | 2,832.45       | 2,869.29           | -                | 2,848.17      |
| 0102 | Cascade H S                | HS       | 2027        | 110    | 2,874.30        | Y                      | 2,807.82       | 2,855.49           | -                | 2,874.30      |
| 0502 | Augusta Elem               | EL       | 2027        | 111    | 2,900.43        | Y                      | 2,389.11       | 2,389.11           | -                | 2,900.43      |
| 0884 | Choteau H S                | HS       | 2027        | 111    | 2,900.43        | Y                      | 2,832.45       | 4,187.10           | -                | 2,900.43      |
| 0847 | Park City H S              | HS       | 2027        | 112    | 2,926.56        | Y                      | 2,561.52       | 2,586.94           | -                | 2,926.56      |
| 0134 | Fort Benton H S            | HS       | 2027        | 115    | 3,004.95        | Y                      | 2,807.82       | 2,809.00           | -                | 3,004.95      |
| 1235 | Dutton/Brady K-12 Schools  | K12      | 2027        | 117    | 3,057.21        | Y                      | 3,275.79       | 3,275.79           | -                | 3,057.21      |
| 0029 | Chinook H S                | HS       | 2027        | 120    | 3,135.60        | Y                      | 3,029.49       | 3,029.49           | -                | 3,135.60      |
| 0891 | Fairfield H S              | HS       | 2027        | 120    | 3,135.60        | Y                      | 2,980.23       | 3,016.87           | -                | 3,135.60      |
| 0861 | Absarokee Elem             | EL       | 2027        | 128    | 3,344.64        | Y                      | 3,128.01       | 3,128.01           | -                | 3,344.64      |
| 0475 | Arlee H S                  | HS       | 2027        | 131    | 3,423.03        | Y                      | 3,571.35       | 3,571.35           | -                | 3,423.03      |
| 0469 | Hobson K-12 Schools        | K12      | 2027        | 133    | 3,475.29        | Y                      | 3,448.20       | 3,578.05           | -                | 3,475.29      |
| 0547 | Circle Elem                | EL       | 2027        | 133    | 3,475.29        | Y                      | 3,374.31       | 3,562.05           | -                | 3,475.29      |
| 0061 | Joliet H S                 | HS       | 2027        | 134    | 3,501.42        | Y                      | 3,472.83       | 3,472.83           | -                | 3,501.42      |
| 1229 | Rocky Boy H S              | HS       | 2027        | 135    | 3,527.55        | Y                      | 3,645.24       | 3,645.24           | -                | 3,527.55      |
| 0131 | Ulm Elem                   | EL       | 2027        | 136    | 3,553.68        | Y                      | 3,595.98       | 3,595.99           | -                | 3,553.68      |
| 0364 | Gallatin Gateway Elem      | EL       | 2027        | 136    | 3,553.68        | Y                      | 3,743.76       | 7,487.52           | -                | 3,553.68      |
| 0127 | Vaughn Elem                | EL       | 2027        | 138    | 3,605.94        | Y                      | 3,866.91       | 3,866.91           | -                | 3,605.94      |

| LE   | LE Name                     | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|-----------------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0903 | Sunburst K-12 Schools       | K12      | 2027        | 139    | 3,632.07        | Y                      | 3,990.06       | 4,771.18           | -                | 3,632.07      |
| 1205 | Charlo Elem                 | EL       | 2027        | 141    | 3,684.33        | Y                      | 4,039.32       | 4,187.10           | -                | 3,684.33      |
| 0911 | Shelby H S                  | HS       | 2027        | 144    | 3,762.72        | Y                      | 3,374.31       | 3,374.31           | -                | 3,762.72      |
| 1227 | Shields Valley Elem         | EL       | 2027        | 146    | 3,814.98        | Y                      | 3,694.50       | 3,694.50           | -                | 3,814.98      |
| 0968 | Blue Creek Elem             | EL       | 2027        | 149    | 3,893.37        | Y                      | 4,581.18       | 4,581.18           | -                | 3,893.37      |
| 0675 | Conrad H S                  | HS       | 2027        | 151    | 3,945.63        | Y                      | 3,620.61       | 5,232.95           | -                | 3,945.63      |
| 1221 | Lincoln K-12 Schools        | K12      | 2027        | 153    | 3,997.89        | Y                      | 3,694.50       | 3,694.50           | -                | 3,997.89      |
| 0376 | Amsterdam Elem              | EL       | 2027        | 154    | 4,024.02        | Y                      | 4,236.36       | 4,398.97           | -                | 4,024.02      |
| 0964 | Wibaux K-12 Schools         | K12      | 2027        | 155    | 4,050.15        | Y                      | 3,940.80       | 3,940.80           | -                | 4,050.15      |
| 0577 | Alberton K-12 Schools       | K12      | 2027        | 156    | 4,076.28        | Y                      | 3,817.65       | 3,817.65           | -                | 4,076.28      |
| 0291 | Winifred K-12 Schools       | K12      | 2027        | 157    | 4,102.41        | Y                      | 4,088.58       | 4,088.58           | -                | 4,102.41      |
| 0597 | Seeley Lake Elem            | EL       | 2027        | 157    | 4,102.41        | Y                      | 4,482.66       | 4,483.00           | -                | 4,102.41      |
| 0774 | Frontier Elem               | EL       | 2027        | 157    | 4,102.41        | Y                      | 3,029.49       | 16,164.00          | -                | 4,102.41      |
| 0797 | Colstrip H S                | HS       | 2027        | 157    | 4,102.41        | Y                      | 3,940.80       | 22,749.12          | -                | 4,102.41      |
| 0341 | Marion Elem                 | EL       | 2027        | 159    | 4,154.67        | Y                      | 4,408.77       | 4,408.77           | -                | 4,154.67      |
| 1226 | Heart Butte K-12 Schools    | K12      | 2027        | 159    | 4,154.67        | Y                      | 5,320.08       | 6,000.00           | -                | 4,154.67      |
| 0606 | Roundup High School         | HS       | 2027        | 160    | 4,180.80        | Y                      | 4,260.99       | 4,260.99           | -                | 4,180.80      |
| 0705 | Broadus Elem                | EL       | 2027        | 162    | 4,233.06        | Y                      | 3,817.65       | 3,817.65           | -                | 4,233.06      |
| 1225 | Sun River Valley Elem       | EL       | 2027        | 162    | 4,233.06        | Y                      | 4,507.29       | 4,507.29           | -                | 4,233.06      |
| 0726 | Terry K-12 Schools          | K12      | 2027        | 164    | 4,285.32        | Y                      | 3,965.43       | 3,965.43           | -                | 4,285.32      |
| 0842 | Ramsay Elem                 | EL       | 2027        | 164    | 4,285.32        | Y                      | 4,260.99       | 4,342.56           | -                | 4,285.32      |
| 0882 | Sweet Grass County H S      | HS       | 2027        | 165    | 4,311.45        | Y                      | 4,063.95       | 4,063.95           | -                | 4,311.45      |
| 0570 | White Sulphur Spgs K-12     | K12      | 2027        | 171    | 4,468.23        | Y                      | 4,802.85       | 4,802.85           | -                | 4,468.23      |
| 0454 | Whitehall H S               | HS       | 2027        | 173    | 4,520.49        | Y                      | 3,842.28       | 8,029.38           | -                | 4,520.49      |
| 1190 | Lodge Grass H S             | HS       | 2027        | 175    | 4,572.75        | Y                      | 4,334.88       | 4,334.88           | -                | 4,572.75      |
| 0713 | Powell County H S           | HS       | 2027        | 178    | 4,651.14        | Y                      | 4,605.81       | 4,605.81           | -                | 4,651.14      |
| 0307 | Deer Park Elem              | EL       | 2027        | 179    | 4,677.27        | Y                      | 4,630.44       | 4,630.44           | -                | 4,677.27      |
| 0785 | Bainville K-12 Schools      | K12      | 2027        | 179    | 4,677.27        | Y                      | 4,334.88       | 4,334.88           | -                | 4,677.27      |
| 0979 | Broadview K-12              | K12      | 2027        | 179    | 4,677.27        | Y                      | 1,428.54       | 1,428.54           | -                | 4,677.27      |
| 0416 | Philipsburg K-12 Schools    | K12      | 2027        | 180    | 4,703.40        | Y                      | 4,802.85       | 4,802.85           | -                | 4,703.40      |
| 0057 | Red Lodge H S               | HS       | 2027        | 183    | 4,781.79        | Y                      | 4,556.55       | 4,556.55           | -                | 4,781.79      |
| 0031 | Harlem H S                  | HS       | 2027        | 184    | 4,807.92        | Y                      | 4,187.10       | 5,075.29           | -                | 4,807.92      |
| 0537 | Sheridan Elem               | EL       | 2027        | 184    | 4,807.92        | Y                      | 4,507.29       | 4,507.75           | -                | 4,807.92      |
| 1230 | Lame Deer H S               | HS       | 2027        | 184    | 4,807.92        | Y                      | 4,926.00       | 13,856.29          | -                | 4,807.92      |
| 0815 | Hot Springs K-12            | K12      | 2027        | 185    | 4,834.05        | Y                      | 4,384.14       | 4,391.79           | -                | 4,834.05      |
| 0750 | Fairview Elem               | EL       | 2027        | 187    | 4,886.31        | Y                      | 4,507.29       | 4,875.17           | -                | 4,886.31      |
| 0805 | Thompson Falls H S          | HS       | 2027        | 187    | 4,886.31        | Y                      | 5,049.15       | 5,444.18           | -                | 4,886.31      |
| 0582 | St Regis K-12 Schools       | K12      | 2027        | 190    | 4,964.70        | Y                      | 4,926.00       | 4,926.00           | -                | 4,964.70      |
| 0403 | Cut Bank H S                | HS       | 2027        | 192    | 5,016.96        | Y                      | 5,541.75       | 21,893.46          | -                | 5,016.96      |
| 0324 | Smith Valley Elem           | EL       | 2027        | 194    | 5,069.22        | Y                      | 5,393.97       | 5,501.20           | -                | 5,069.22      |
| 0790 | Forsyth Elem                | EL       | 2027        | 197    | 5,147.61        | Y                      | 5,221.56       | 5,221.56           | -                | 5,147.61      |
| 1236 | Chester-Joplin-Inverness El | EL       | 2027        | 199    | 5,199.87        | Y                      | 5,172.30       | 5,172.30           | -                | 5,199.87      |
| 0777 | Culbertson Elem             | EL       | 2027        | 202    | 5,278.26        | Y                      | 4,901.37       | 4,901.37           | -                | 5,278.26      |
| 0323 | Kila Elem                   | EL       | 2027        | 205    | 5,356.65        | Y                      | 4,704.33       | 4,731.41           | -                | 5,356.65      |
| 0969 | Canyon Creek Elem           | EL       | 2027        | 206    | 5,382.78        | Y                      | 5,763.42       | 5,857.38           | -                | 5,382.78      |
| 0059 | Bridger K-12 Schools        | K12      | 2027        | 207    | 5,408.91        | Y                      | 5,295.45       | 5,295.45           | -                | 5,408.91      |

| LE   | LE Name                    | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|----------------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0133 | Fort Benton Elem           | EL       | 2027        | 211    | 5,513.43        | Y                      | 5,960.46       | 5,960.46           | -                | 5,513.43      |
| 0890 | Fairfield Elem             | EL       | 2027        | 212    | 5,539.56        | Y                      | 5,172.30       | 5,172.30           | -                | 5,539.56      |
| 0138 | Big Sandy K-12             | K12      | 2027        | 217    | 5,670.21        | Y                      | 4,975.26       | 5,455.63           | -                | 5,670.21      |
| 0781 | Wolf Point H S             | HS       | 2027        | 217    | 5,670.21        | Y                      | 5,591.01       | 6,034.35           | -                | 5,670.21      |
| 0028 | Chinook Elem               | EL       | 2027        | 219    | 5,722.47        | Y                      | 5,788.05       | 5,788.05           | -                | 5,722.47      |
| 0366 | Anderson Elem              | EL       | 2027        | 228    | 5,957.64        | Y                      | 5,566.38       | 5,601.52           | -                | 5,957.64      |
| 0846 | Park City Elem             | EL       | 2027        | 228    | 5,957.64        | Y                      | 5,541.75       | 6,252.54           | -                | 5,957.64      |
| 0456 | Boulder Elem               | EL       | 2027        | 232    | 6,062.16        | Y                      | 5,615.64       | 5,615.64           | -                | 6,062.16      |
| 0595 | Clinton Elem               | EL       | 2027        | 232    | 6,062.16        | Y                      | 5,689.53       | 5,689.53           | -                | 6,062.16      |
| 0986 | Shepherd H S               | HS       | 2027        | 236    | 6,166.68        | Y                      | 6,428.43       | 7,000.00           | -                | 6,166.68      |
| 0101 | Cascade Elem               | EL       | 2027        | 239    | 6,245.07        | Y                      | 5,147.67       | 7,833.62           | -                | 6,245.07      |
| 0025 | Lodge Grass Elem           | EL       | 2027        | 240    | 6,271.20        | Y                      | 6,526.95       | 6,526.95           | -                | 6,271.20      |
| 0540 | Twin Bridges K-12 Schools  | K12      | 2027        | 244    | 6,375.72        | Y                      | 5,418.60       | 8,855.90           | -                | 6,375.72      |
| 0519 | Troy Elem                  | EL       | 2027        | 248    | 6,480.24        | Y                      | 6,822.51       | 6,823.00           | -                | 6,480.24      |
| 0104 | Centerville Elem           | EL       | 2027        | 252    | 6,584.76        | Y                      | 6,576.21       | 7,720.54           | -                | 6,584.76      |
| 0849 | Columbus H S               | HS       | 2027        | 252    | 6,584.76        | Y                      | 6,132.87       | 6,132.87           | -                | 6,584.76      |
| 0112 | Belt Elem                  | EL       | 2027        | 254    | 6,637.02        | Y                      | 6,699.36       | 6,699.36           | -                | 6,637.02      |
| 0361 | Three Forks H S            | HS       | 2027        | 257    | 6,715.41        | Y                      | 6,650.10       | 6,650.10           | -                | 6,715.41      |
| 0348 | Manhattan High School      | HS       | 2027        | 266    | 6,950.58        | Y                      | 6,256.02       | 6,871.90           | -                | 6,950.58      |
| 1213 | Hays-Lodge Pole K-12 Schls | K12      | 2027        | 269    | 7,028.97        | Y                      | 6,871.77       | 6,872.00           | -                | 7,028.97      |
| 0474 | Arlee Elem                 | EL       | 2027        | 270    | 7,055.10        | Y                      | 6,822.51       | 13,645.02          | -                | 7,055.10      |
| 0776 | Poplar H S                 | HS       | 2027        | 270    | 7,055.10        | Y                      | 6,773.25       | 6,773.25           | -                | 7,055.10      |
| 0060 | Joliet Elem                | EL       | 2027        | 278    | 7,264.14        | Y                      | 6,921.03       | 6,921.03           | -                | 7,264.14      |
| 0528 | Lincoln County H S         | HS       | 2027        | 278    | 7,264.14        | Y                      | 7,536.78       | 7,536.78           | -                | 7,264.14      |
| 0374 | West Yellowstone K-12      | K12      | 2027        | 279    | 7,290.27        | Y                      | 7,216.59       | 8,216.59           | -                | 7,290.27      |
| 0194 | Scobey K-12 Schools        | K12      | 2027        | 285    | 7,447.05        | Y                      | 7,191.96       | 7,191.96           | -                | 7,447.05      |
| 0865 | Big Timber Elem            | EL       | 2027        | 296    | 7,734.48        | Y                      | 8,127.90       | 8,127.90           | -                | 7,734.48      |
| 0946 | Harlowton K-12             | K12      | 2027        | 305    | 7,969.65        | Y                      | 6,847.14       | 9,514.02           | -                | 7,969.65      |
| 0320 | Helena Flats Elem          | EL       | 2027        | 306    | 7,995.78        | Y                      | 7,315.11       | 8,767.00           | -                | 7,995.78      |
| 0883 | Choteau Elem               | EL       | 2027        | 312    | 8,152.56        | Y                      | 8,127.90       | 8,127.90           | -                | 8,152.56      |
| 0425 | Box Elder Elem             | EL       | 2027        | 313    | 8,178.69        | Y                      | 7,635.30       | 7,635.30           | -                | 8,178.69      |
| 0804 | Thompson Falls Elem        | EL       | 2027        | 321    | 8,387.73        | Y                      | 8,004.75       | 8,004.75           | -                | 8,387.73      |
| 0056 | Red Lodge Elem             | EL       | 2027        | 326    | 8,518.38        | Y                      | 8,226.42       | 9,072.93           | -                | 8,518.38      |
| 0207 | Dawson H S                 | HS       | 2027        | 327    | 8,544.51        | Y                      | 8,521.98       | 9,173.79           | -                | 8,544.51      |
| 0237 | Anaconda H S               | HS       | 2027        | 332    | 8,675.16        | Y                      | 7,586.04       | 7,800.00           | -                | 8,675.16      |
| 0317 | Cayuse Prairie Elem        | EL       | 2027        | 337    | 8,805.81        | Y                      | 7,783.08       | 7,783.08           | -                | 8,805.81      |
| 0457 | Jefferson H S              | HS       | 2027        | 337    | 8,805.81        | Y                      | 7,512.15       | 9,294.71           | -                | 8,805.81      |
| 0796 | Colstrip Elem              | EL       | 2027        | 338    | 8,831.94        | Y                      | 9,334.77       | 12,072.04          | -                | 8,831.94      |
| 0579 | Superior K-12 Schools      | K12      | 2027        | 340    | 8,884.20        | Y                      | 8,398.83       | 8,886.62           | -                | 8,884.20      |
| 0590 | Bonner Elem                | EL       | 2027        | 340    | 8,884.20        | Y                      | 8,940.69       | 8,940.69           | -                | 8,884.20      |
| 0006 | Beaverhead County H S      | HS       | 2027        | 348    | 9,093.24        | Y                      | 8,595.87       | 8,595.87           | -                | 9,093.24      |
| 0674 | Conrad Elem                | EL       | 2027        | 349    | 9,119.37        | Y                      | 8,842.17       | 9,214.00           | -                | 9,119.37      |
| 0828 | Plentywood K-12 Schools    | K12      | 2027        | 358    | 9,354.54        | Y                      | 9,162.36       | 9,175.29           | -                | 9,354.54      |
| 0733 | Stevensville H S           | HS       | 2027        | 370    | 9,668.10        | Y                      | 9,113.10       | 10,989.41          | -                | 9,668.10      |
| 0746 | Sidney H S                 | HS       | 2027        | 373    | 9,746.49        | Y                      | 9,728.85       | 19,443.29          | -                | 9,746.49      |
| 0792 | Lame Deer Elem             | EL       | 2027        | 388    | 10,138.44       | Y                      | 10,122.93      | 14,330.43          | -                | 10,138.44     |

| LE   | LE Name                      | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|------------------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0605 | Roundup Elem                 | EL       | 2027        | 393    | 10,269.09       | Y                      | 9,975.15       | 9,975.15           | -                | 10,269.09     |
| 0452 | Clancy Elem                  | EL       | 2027        | 397    | 10,373.61       | Y                      | 9,901.26       | 9,901.26           | -                | 10,373.61     |
| 1239 | Big Sky School K-12          | K12      | 2027        | 401    | 10,478.13       | Y                      | 10,541.64      | 10,541.64          | -                | 10,478.13     |
| 1200 | Ronan H S                    | HS       | 2027        | 405    | 10,582.65       | Y                      | 9,704.22       | 9,704.22           | -                | 10,582.65     |
| 0259 | Fergus H S                   | HS       | 2027        | 407    | 10,634.91       | Y                      | 8,965.32       | 9,040.77           | -                | 10,634.91     |
| 0712 | Deer Lodge Elem              | EL       | 2027        | 408    | 10,661.04       | Y                      | 10,517.01      | 10,517.01          | -                | 10,661.04     |
| 0910 | Shelby Elem                  | EL       | 2027        | 426    | 11,131.38       | Y                      | 10,246.08      | 11,596.08          | -                | 11,131.38     |
| 0803 | Plains K-12                  | K12      | 2027        | 436    | 11,392.68       | Y                      | 11,255.91      | 11,325.74          | -                | 11,392.68     |
| 1207 | Rocky Boy Elem               | EL       | 2027        | 438    | 11,444.94       | Y                      | 11,255.91      | 11,255.91          | -                | 11,444.94     |
| 0030 | Harlem Elem                  | EL       | 2027        | 457    | 11,941.41       | Y                      | 11,748.51      | 16,173.78          | -                | 11,941.41     |
| 0244 | Baker K-12 Schools           | K12      | 2027        | 461    | 12,045.93       | Y                      | 11,699.25      | 28,505.07          | -                | 12,045.93     |
| 0546 | Ennis K-12 Schools           | K12      | 2027        | 465    | 12,150.45       | Y                      | 10,935.72      | 10,935.72          | -                | 12,150.45     |
| 0848 | Columbus Elem                | EL       | 2027        | 469    | 12,254.97       | Y                      | 12,438.15      | 12,438.15          | -                | 12,254.97     |
| 0981 | Elysian Elem                 | EL       | 2027        | 474    | 12,385.62       | Y                      | 10,714.05      | 10,714.05          | -                | 12,385.62     |
| 0780 | Wolf Point Elem              | EL       | 2027        | 477    | 12,464.01       | Y                      | 12,906.12      | 13,402.52          | -                | 12,464.01     |
| 0481 | St Ignatius K-12 Schools     | K12      | 2027        | 481    | 12,568.53       | Y                      | 12,068.70      | 16,745.47          | -                | 12,568.53     |
| 0347 | Manhattan School             | EL       | 2027        | 491    | 12,829.83       | Y                      | 12,241.11      | 14,873.27          | -                | 12,829.83     |
| 0192 | Custer County H S            | HS       | 2027        | 497    | 12,986.61       | Y                      | 12,487.41      | 12,487.41          | -                | 12,986.61     |
| 0460 | Montana City Elem            | EL       | 2027        | 512    | 13,378.56       | Y                      | 11,896.29      | 11,897.69          | -                | 13,378.56     |
| 0659 | Malta K-12 Schools           | K12      | 2027        | 515    | 13,456.95       | Y                      | 12,709.08      | 12,709.08          | -                | 13,456.95     |
| 0527 | Eureka Elem                  | EL       | 2027        | 520    | 13,587.60       | Y                      | 13,053.90      | 13,053.90          | -                | 13,587.60     |
| 0588 | Lolo Elem                    | EL       | 2027        | 535    | 13,979.55       | Y                      | 13,374.09      | 13,374.09          | -                | 13,979.55     |
| 0478 | Polson H S                   | HS       | 2027        | 539    | 14,084.07       | Y                      | 13,645.02      | 13,645.02          | -                | 14,084.07     |
| 0428 | Havre H S                    | HS       | 2027        | 542    | 14,162.46       | Y                      | 13,029.27      | 13,029.27          | -                | 14,162.46     |
| 0402 | Cut Bank Elem                | EL       | 2027        | 545    | 14,240.85       | Y                      | 13,940.58      | 14,645.58          | -                | 14,240.85     |
| 0327 | Somers Elem                  | EL       | 2027        | 553    | 14,449.89       | Y                      | 14,112.99      | 14,112.99          | -                | 14,449.89     |
| 0360 | Three Forks Elem             | EL       | 2027        | 554    | 14,476.02       | Y                      | 13,792.80      | 13,792.80          | -                | 14,476.02     |
| 0985 | Shepherd Elem                | EL       | 2027        | 556    | 14,528.28       | Y                      | 14,334.66      | 18,110.00          | -                | 14,528.28     |
| 0593 | Target Range Elem            | EL       | 2027        | 567    | 14,815.71       | Y                      | 14,186.88      | 14,186.88          | -                | 14,815.71     |
| 1189 | Hardin H S                   | HS       | 2027        | 568    | 14,841.84       | Y                      | 13,275.57      | 13,572.81          | -                | 14,841.84     |
| 0775 | Poplar Elem                  | EL       | 2027        | 588    | 15,364.44       | Y                      | 15,344.49      | 15,344.49          | -                | 15,364.44     |
| 0971 | Laurel H S                   | HS       | 2027        | 589    | 15,390.57       | Y                      | 15,541.53      | 19,477.32          | -                | 15,390.57     |
| 0339 | Evergreen Elem               | EL       | 2027        | 660    | 17,245.80       | Y                      | 16,945.44      | 16,945.44          | -                | 17,245.80     |
| 0335 | Whitefish H S                | HS       | 2027        | 671    | 17,533.23       | Y                      | 16,034.13      | 16,034.13          | -                | 17,533.23     |
| 0732 | Stevensville Elem            | EL       | 2027        | 685    | 17,899.05       | Y                      | 16,797.66      | 18,476.08          | -                | 17,899.05     |
| 0363 | Monforton Elem               | EL       | 2027        | 703    | 18,369.39       | Y                      | 17,388.78      | 17,388.78          | -                | 18,369.39     |
| 0401 | Browning H S                 | HS       | 2027        | 703    | 18,369.39       | Y                      | 15,098.19      | 230,308.04         | -                | 18,369.39     |
| 0972 | Elder Grove Elem             | EL       | 2027        | 718    | 18,761.34       | Y                      | 17,832.12      | 17,832.12          | -                | 18,761.34     |
| 0236 | Anaconda Elem                | EL       | 2027        | 720    | 18,813.60       | Y                      | 18,768.06      | 20,028.60          | -                | 18,813.60     |
| 0055 | Townsend K-12 Schools        | K12      | 2027        | 757    | 19,780.41       | Y                      | 17,979.90      | 18,294.72          | -                | 19,780.41     |
| 0743 | Florence-Carlton K-12 Schls  | K12      | 2027        | 771    | 20,146.23       | Y                      | 20,270.49      | 21,307.28          | -                | 20,146.23     |
| 0005 | Dillon Elem                  | EL       | 2027        | 781    | 20,407.53       | Y                      | 19,851.78      | 19,851.78          | -                | 20,407.53     |
| 0206 | Glendive Elem                | EL       | 2027        | 782    | 20,433.66       | Y                      | 19,827.15      | 19,827.15          | -                | 20,433.66     |
| 0983 | Huntley Project K-12 Schools | K12      | 2027        | 782    | 20,433.66       | Y                      | 19,654.74      | 19,654.74          | -                | 20,433.66     |
| 0926 | Glasgow K-12 Schools         | K12      | 2027        | 788    | 20,590.44       | Y                      | 19,679.37      | 19,679.37          | -                | 20,590.44     |
| 1184 | West Valley Elem             | EL       | 2027        | 824    | 21,531.12       | Y                      | 19,531.59      | 19,531.59          | -                | 21,531.12     |



| LE   | LE Name                 | LE Level | Fiscal Year | BL ANB | Budgeted Amount | Non-Fiscal Requirement | Revenue Amount | Expenditure Amount | Reduction Amount | Adjusted IEFA |
|------|-------------------------|----------|-------------|--------|-----------------|------------------------|----------------|--------------------|------------------|---------------|
| 0258 | Lewistown Elem          | EL       | 2027        | 842    | 22,001.46       | Y                      | 22,117.74      | 24,525.13          | -                | 22,001.46     |
| 0745 | Sidney Elem             | EL       | 2027        | 856    | 22,367.28       | Y                      | 21,428.10      | 37,173.68          | -                | 22,367.28     |
| 0172 | Miles City Elem         | EL       | 2027        | 936    | 24,457.68       | Y                      | 24,112.77      | 24,112.77          | -                | 24,457.68     |
| 0369 | Belgrade H S            | HS       | 2027        | 967    | 25,267.71       | Y                      | 25,122.60      | 26,431.99          | -                | 25,267.71     |
| 1199 | Ronan Elem              | EL       | 2027        | 1082   | 28,272.66       | Y                      | 27,684.12      | 27,684.12          | -                | 28,272.66     |
| 0477 | Polson Elem             | EL       | 2027        | 1101   | 28,769.13       | Y                      | 28,841.73      | 28,841.74          | -                | 28,769.13     |
| 0970 | Laurel Elem             | EL       | 2027        | 1196   | 31,251.48       | Y                      | 31,477.14      | 34,159.45          | -                | 31,251.48     |
| 0522 | Libby K-12 Schools      | K12      | 2027        | 1199   | 31,329.87       | Y                      | 29,506.74      | 29,743.66          | -                | 31,329.87     |
| 0023 | Hardin Elem             | EL       | 2027        | 1262   | 32,976.06       | Y                      | 31,698.81      | 31,698.81          | -                | 32,636.37     |
| 0427 | Havre Elem              | EL       | 2027        | 1310   | 34,230.30       | Y                      | 32,068.26      | 32,068.26          | -                | 34,230.30     |
| 1212 | Butte H S               | HS       | 2027        | 1320   | 34,491.60       | Y                      | 32,684.01      | 32,684.01          | -                | 34,491.60     |
| 0400 | Browning Elem           | EL       | 2027        | 1335   | 34,883.55       | Y                      | 33,299.76      | 561,411.72         | -                | 34,883.55     |
| 0334 | Whitefish Elem          | EL       | 2027        | 1346   | 35,170.98       | Y                      | 33,644.58      | 33,645.00          | -                | 35,170.98     |
| 0599 | Frenchtown K-12 Schools | K12      | 2027        | 1380   | 36,059.40       | Y                      | 36,132.21      | 36,132.21          | -                | 36,059.40     |
| 0586 | Hellgate Elem           | EL       | 2027        | 1547   | 40,423.11       | Y                      | 37,733.16      | 37,733.16          | -                | 40,423.11     |
| 1241 | Lockwood K-12           | K12      | 2027        | 1651   | 43,140.63       | Y                      | 42,806.94      | 42,806.94          | -                | 43,140.63     |
| 0735 | Hamilton K-12 Schools   | K12      | 2027        | 1705   | 44,551.65       | Y                      | 42,240.45      | 44,789.39          | -                | 44,551.65     |
| 0731 | Corvallis K-12 Schools  | K12      | 2027        | 1851   | 48,366.63       | Y                      | 36,600.18      | 41,676.75          | -                | 48,366.63     |
| 1240 | East Helena K-12        | K12      | 2027        | 2101   | 54,899.13       | Y                      | 49,062.96      | 57,872.53          | -                | 54,899.13     |
| 0368 | Belgrade Elem           | EL       | 2027        | 2323   | 60,699.99       | Y                      | 59,826.27      | 61,006.50          | -                | 60,699.99     |
| 0488 | Helena H S              | HS       | 2027        | 2547   | 66,553.11       | Y                      | 62,289.27      | 63,165.99          | -                | 66,553.11     |
| 0351 | Bozeman H S             | HS       | 2027        | 2933   | 76,639.29       | Y                      | 69,727.53      | 69,727.53          | -                | 76,639.29     |
| 0099 | Great Falls H S         | HS       | 2027        | 3010   | 78,651.30       | Y                      | 77,165.79      | 77,165.79          | -                | 78,651.30     |
| 0840 | Butte Elem              | EL       | 2027        | 3021   | 78,938.73       | Y                      | 75,564.84      | 82,758.03          | -                | 78,938.73     |
| 0311 | Flathead H S            | HS       | 2027        | 3080   | 80,480.40       | Y                      | 77,806.17      | 77,867.15          | -                | 80,480.40     |
| 0310 | Kalispell Elem          | EL       | 2027        | 3145   | 82,178.85       | Y                      | 78,816.00      | 78,816.63          | -                | 82,178.85     |
| 0584 | Missoula H S            | HS       | 2027        | 4026   | 105,199.38      | Y                      | 100,194.84     | 146,071.22         | -                | 105,199.38    |
| 0350 | Bozeman Elem            | EL       | 2027        | 4895   | 127,906.35      | Y                      | 119,751.06     | 119,751.06         | -                | 127,906.35    |
| 0487 | Helena Elem             | EL       | 2027        | 5345   | 139,664.85      | Y                      | 132,484.77     | 132,533.31         | -                | 139,664.85    |
| 0583 | Missoula Elem           | EL       | 2027        | 5445   | 142,277.85      | Y                      | 134,184.24     | 200,870.02         | -                | 142,277.85    |
| 0966 | Billings H S            | HS       | 2027        | 5641   | 147,399.33      | Y                      | 139,996.92     | 140,171.03         | -                | 147,399.33    |
| 0098 | Great Falls Elem        | EL       | 2027        | 7196   | 188,031.48      | Y                      | 178,296.57     | 178,296.57         | -                | 188,031.48    |
| 0965 | Billings Elem           | EL       | 2027        | 11382  | 297,411.66      | Y                      | 281,668.68     | 290,009.56         | -                | 297,411.66    |

**ITEM 16**

**INFORMATION AND UPDATE ON  
INTENSIVE ASSISTANCE PROCESS**

**Dr. Julie Murgel  
Dr. Brooke Gondara**

# Montana Board of Public Education

## Executive Summary

**Date:** July 22-24, 2026

|                              |                                                                                                                                                                                                   |                                |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|
| <b>Presentation</b>          | Update on the Intensive Assistance Process for Accreditation                                                                                                                                      |                                |
| <b>Presenter</b>             | Julie Murgel                                                                                                                                                                                      | Dr. Brooke Beaverheart Gondara |
| <b>Position Title</b>        | Chief Program Officer<br>Indian Education Director<br>Office of Public Instruction                                                                                                                |                                |
| <b>Overview</b>              | Presentation on Status of Intensive Assistant Process: <ul style="list-style-type: none"><li>• Overview</li><li>• MOU</li><li>• Timeline</li><li>• Completed Tasks</li><li>• Next Steps</li></ul> |                                |
| <b>Requested Decision(s)</b> | Information Item                                                                                                                                                                                  |                                |
| <b>Related Issue(s)</b>      | 10.55.602(21), 10.55.605(8)(9)                                                                                                                                                                    |                                |
| <b>Recommendation(s)</b>     | n/a                                                                                                                                                                                               |                                |





## **Intensive Assistance Overview**

**“Intensive Assistance”** as defined by ARM 10.55.602 and outlined in ARM 10.55.605, is a required process for schools that remain in deficiency status and have failed to develop or implement an approved corrective plan to remedy accreditation deviations within the designated timeline. Deficiency means a school continues to have serious and/or numerous deviations or has substantially increased the seriousness of deviations over the previous year. Intensive Assistance centered on school redesign is a form of school turnaround that is an intensive three-year intervention directed by the Board of Public Education (BPE) and administered by the Office of Public Instruction (OPI) with the goal of dramatically improving the way a school operates.

### **Schools Identified for Intensive Assistance to Start in 2026-2027**

Heart Butte Elementary  
Heart Butte 6-8  
Heart Butte High School  
Lame Deer School  
Lame Deer 7-8

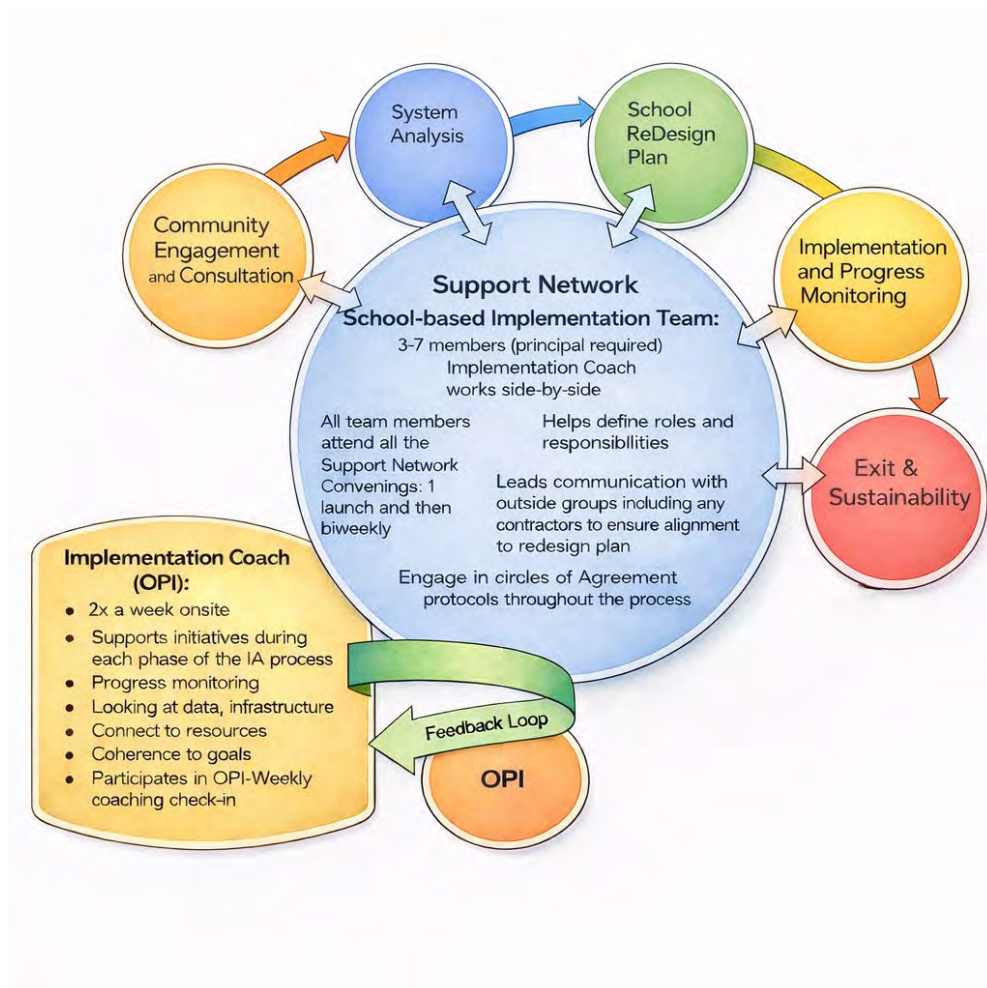
### **Intensive Assistance Vision Statement**

Intensive Assistance Support will be intentional, individualized, and culturally relevant—designed to honor local context and community voice while maintaining clarity and accountability. In collaboration with its community, each school develops a school redesign plan reflecting its unique strengths and needs, using backward mapping and transparent progress markers. Flexibility will be provided to locally define relevant goals, identify and mitigate barriers, and adjust supports. As a result, schools will implement focused strategies, provide opportunities, demonstrate progress, and achieve academic outcomes that endure for students.

### **Intensive Assistance Process**

The Intensive Assistance process is a highly structured, mandatory intervention designed to support and guide schools requiring significant, systemic, and sustained improvement. This framework is characterized by five sequential and critical phases, each demanding specific actions, stakeholder involvement, and measurable outcomes. The process is designed not merely to address immediate deficiencies but to establish the foundational conditions for long-term excellence and self-sufficiency. Schools in intensive assistance receive support throughout the three-year process through the support network, an OPI implementation coach, and additional approved third-party entities contracted by the district.

## Graphic Representation of the Intensive Assistance Process



## Framework for Intensive Assistance

|                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Phase 1</b></p> <p><b>Community Engagement and Consultation</b></p> | <p><b>This phase promotes community engagement and understanding of the intensive assistance designation and process.</b></p> <p><b>Key Deliverables:</b> "Circles of Agreement": This structured process necessitates the direct involvement of all stakeholders. The outcome is the formalization of a "community agreement" that codifies shared values, commitment to the system analysis and school redesign plan, and a unified vision for the school's future.</p> <p><b>Focus Areas:</b> The engagement process must clearly define critical, specific, high-leverage focus areas where intervention will have the greatest impact on student performance and school climate.</p>                                                                                                                                                                                                                                                                                                          |
| <p><b>Phase 2</b></p> <p><b>System Analysis</b></p>                       | <p><b>This process guide supports district leaders in conducting a comprehensive system analysis of a school identified as needing intensive assistance.</b></p> <p><b>Objective:</b> The primary goal is to move beyond superficial symptoms to identify the root, persistent systemic challenges that have prevented past improvement efforts from succeeding. This includes scrutinizing fiscal practices, curriculum alignment, instructional delivery models, human capital management, and organizational culture.</p> <p><b>Key Output:</b> The analysis must ascertain the current functionality and effectiveness of the existing system and, critically, define the prerequisite conditions, resources, policies, staffing, professional development—that must be established for sustainable and enduring school improvement to take root.</p>                                                                                                                                          |
| <p><b>Phase 3</b></p> <p><b>School Redesign Planning</b></p>              | <p><b>During phase 3, the school-based implementation team will develop a full redesign plan that rethinks core elements of the school model to accelerate student outcomes.</b></p> <p><b>Plan Requirements:</b> The plan is held to stringent standards:</p> <ul style="list-style-type: none"> <li>● <b>Cohorence:</b> All components (curriculum, instruction, assessment, professional learning) must be mutually supportive and aligned.</li> <li>● <b>Pragmatic:</b> The strategies must be realistic given the school's resources and capacity.</li> <li>● <b>Measurable:</b> Every critical action must be tied to specific, quantifiable metrics.</li> <li>● <b>Evidence-Based:</b> All interventions must be demonstrably aligned with established, evidence-based practices.</li> <li>● <b>Design Intent:</b> The plan must be explicitly crafted for both rapid improvement (quick wins to build momentum) and enduring improvement (systemic changes for sustainability).</li> </ul> |
| <p><b>Phase 4</b></p>                                                     | <p><b>The school-based implementation team will work side-by-side with an Implementation Coach to transition the detailed plan into active</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |



|                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Implementation and Progress Monitoring</b></p>        | <p>practice.</p> <p><b>Support and Accountability:</b> The team is required to collaborate closely with an assigned <b>Implementation Coach</b>. This coach serves as an external accountability partner and expert resource, ensuring strict fidelity to the developed plan.</p> <p><b>Key Processes:</b></p> <ul style="list-style-type: none"> <li>• <b>Fidelity and Timeliness:</b> Ensuring adherence to the planned interventions and the timely achievement of established milestones.</li> <li>• <b>Transparent Communication:</b> Maintaining open and consistent communication channels with the community and the OPI.</li> <li>• <b>Comprehensive Progress Monitoring:</b> Continuously collecting, analyzing, and reporting data to assess the plan's effectiveness, making necessary course corrections based on evidence, not intuition.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <p><b>Phase 5</b></p> <p><b>Exit and Sustainability</b></p> | <p><b>To promote sustainability, schools that successfully exit the intensive assistance process will continue to participate in the Intensive Support Network for at least one year.</b></p> <p><b>Exit Criteria:</b> For a school to successfully exit the Intensive Assistance process, it must provide verifiable, concrete evidence of sufficient and sustained progress.</p> <p><b>Verification Metrics:</b> This evidence is rigorously verified through:</p> <ul style="list-style-type: none"> <li>• <b>Student Performance Metrics:</b> Demonstrating significant and sustained improvement in key student academic outcomes (e.g., proficiency rates, graduation rates, post-secondary readiness).</li> <li>• <b>Adherence to Assurance Standards:</b> Proving that the new systemic conditions and processes defined in the Redesign Plan (e.g., instructional quality, leadership stability, resource allocation) have been fully institutionalized.</li> </ul> <p><b>Post-Exit Monitoring:</b> Successfully exiting schools are not immediately left to their own but are integrated into the <b>Intensive Support Network</b> for a duration of one to three years, ensuring continued fidelity and support.</p> <p><b>Accountability:</b> Schools are required to present detailed progress reports biannually to the BPE. Failure to participate in any phase, demonstrate the requisite level of progress, or achieve a verified exit status within the maximum three-year period will result in <b>non-accredited status</b>.</p> |

### Intensive Assistance Timeline

**February 2026 - Accreditation due**

## **May 2026- July 2026 - Schools identified for Intensive Assistance**

May 21-22, 2026, BPE meeting (where Accreditation status of schools are approved by the BPE)

### **Phase 1 | Community Engagement and Consultation launches**

- School district special school board meetings (tentative)
- OPI coordinates with SAM to contract with LEA to hire Implementation Administrator
- Launch RFI to identify 3rd party entities that schools may contract for specified services aligned to the process
- School Intensive Assistance Implementation team identified
- Circles of Agreement, with facilitation, meet, prepare, and finalize community agreements

## **July 2026 - January 2027**

### **Phase 2 | System Analysis launches**

- August 3-5, 2026: Support Network Summer launch workshop week
- August 2026: Biweekly virtual Support Network meetings and OPI Implementation Coach weekly site visits begin
- 3rd party entities may be contracted by the school and begin scope of work for specific services to support components of the intensive assistance process.
- School presents system analysis results to stakeholders, local board of trustees, and BPE at January 2027 meeting.

## **February 2027- May 2027**

### **Phase 3 | Redesign Planning launches**

- Support Network meetings, OPI Implementation Coach weekly meetings, and contracted work continue.
- Redesign plan is presented to stakeholders, local board of trustees, and BPE at May 2027 meeting

## **May 2027- August 2027:**

### **Phase 4 | Implementation of redesign plan launches**

- Circles of Agreement reconvene to review community agreements and redesign plan
- Support Network convening year 2
- August 2027: Biweekly virtual Support Network meetings, OPI Implementation Coach weekly site visits, and contract work restart for the school year.

## **September 2027 - May 2028**

### **Phase 4 | Implementation continues and Progress Monitoring launches**

- Implementing the Redesign Plan
- Progress Monitoring Commences
- Support Network meetings, OPI Implementation Coach weekly meetings, and contracted work continue.
- Progress reports are presented to stakeholders, local board of trustees, and BPE at November 2027 & May 2028 BPE Meetings

## **May 2028-August 2028**

### **Phase 4 | Implementation and Progress Monitoring continue**

## **Phase 5 | Exit & Sustainability launches**

- Circles of Agreement reconvenes to review community agreements and progress reports
- Implementation Team prepares Sustainability plan
- Support Network Convening Year 3

## **September 2028-May 2029**

Implementation, progress monitoring, and preparation for Exit and Sustainability continue

- Progress reports and sustainability plan are presented to stakeholders, local board of trustees, and BPE at November 2028 and March 2029 BPE Meeting
- February 2029 Accreditation assurances and student performance components submitted to the OPI.
- May 2029 BPE meeting (where Accreditation status of schools will be approved by the Board). Schools either exit the school intensive assistance process or are designated as non-accredited.

## **Tasks Completed:**

- Schools Identified and approved by BPE for Intensive Assistance (May 21, 2026)
- Notification letters sent to district superintendent, school board chair, and school board clerk. (May 30, 2026)
- OPI key internal support team identified (May 2026)
  - o Lead-Brooke Gondara
  - o TSAR specialists: Crystal Hickman, Michele Henson, Jen Murphy, and Matt Bell)
  - o Administrative Support: Julie Murgel, Christy Mock-Stutz, Marie Judisch, and Tyler Capece
- Held weekly planning meetings with EDNW to support the implementation
- RFI posted to identify 3rd party entities that schools may contract for specified services aligned to the process
- OPI staff capacity building with EDNW-lead by Mandy Smoker Broaddus (July 21, 2026)
- August 3-5<sup>th</sup> Support Network Summer launch workshop planned

## **Next Steps:**

- Execute the MOU with each district
- OPI Executive Leadership to attend local school board meeting to present on the process and review roles and responsibilities. (August 2026)
- Schools identify the School Intensive Assistance Implementation team members
- Finalize the contracts for the Implementation Administrators

- Host August 3-5, 2026, Support Network Summer launch workshop
- Publish the approved external partner list from the RFI
- Schedule and prepare the Circles of Agreement process for Phase 1: Community Engagement and Consultation



## **Memorandum of Understanding: Intensive Assistance Process**

**Parties:** This Memorandum of Understanding (MOU) is entered into by [District Name] (the "District"), the Montana Office of Public Instruction (OPI), and the Montana Board of Public Education (BPE), collectively referred to as the "Parties."

**Purpose:** The purpose of this MOU is to define the roles, responsibilities, and mutual commitments of the Parties regarding the mandatory three-year Intensive Assistance process as defined by ARM 10.55.602 and ARM 10.55.605. The goal is to achieve sustainable systemic improvement, retain accreditation, and improve student outcomes through the designated Intensive Assistance framework.

### **Responsibilities of the OPI and the BPE**

The OPI agrees to establish regular meetings, including in-person and online, provide technical assistance, and work closely with the districts and their Implementation Administrator to understand the work of each phase of the Intensive Assistance process. While the districts remain responsible for preparing reports for the BPE, the OPI will provide support to the districts throughout the process. The BPE will review the reports at their regularly scheduled board meetings, as outlined in the Intensive Assistance timeline to monitor progress, ensure accountability, and inform decisions regarding continued support, midcourse adjustments, and accreditation status.

### **Responsibilities of the District**

The District is mandated to fulfill the following actionable requirements to ensure the integrity of the Intensive Assistance process:

- **Establish, Empower, and Facilitate the School-based Implementation Team:** The District must form a team authorized to drive the improvement process. Membership must include the District Superintendent/Principal, Local School Board Chair, Teacher Leader(s), a High School Student representative, Caregivers/Parents, and Community/Tribal Representative(s).
- **Mandatory Leadership Attendance:** The District Superintendent/Principal is required to attend all launch meetings and support network convenings. Delegation of this responsibility to other staff members is strictly prohibited.
- **Active Collaboration and Funding:** The District is responsible for funding the Implementation Administrator and must maintain consistent, active, and ongoing collaboration with them throughout all phases of the process.

- **BPE Reporting and Accountability:** The District is responsible for the timely preparation and submission of all required progress reports to BPE to facilitate board review and monitoring.

The District is accountable for active engagement and mandatory adherence to all five sequential phases of the Intensive Assistance process:

- **Phase 1: Community Engagement and Consultation:** Facilitating "Circles of Agreement" to codify shared values and a unified vision for the school.
- **Phase 2: System Analysis:** Conducting a comprehensive, data-driven diagnostic of systemic challenges (fiscal, instructional, cultural) to identify root causes.
- **Phase 3: School Redesign Planning:** Developing a coherent, evidence-based redesign plan focused on rapid and enduring improvement.
- **Phase 4: Implementation and Progress Monitoring:** Executing the redesign plan with fidelity, participating in ongoing progress monitoring, and reporting data to the OPI and BPE.
- **Phase 5: Exit and Sustainability:** Demonstrating verifiable evidence of sustained progress in student performance and institutionalized systemic processes.

#### Associated Costs for Districts

- **Implementation Administrator:** Districts will cover the cost of the contract for the implementation administrator's salary and associated work expenses. Estimated costs between \$75,000 - \$100,000.
- **Community engagement and consultation:** Districts will cover operating costs for community events and outreach.
- **System analysis, school redesign planning, and implementation and progress monitoring:** Districts will cover the costs of any chosen external support services, from the approved providers list, for activities in any of the phases.

#### Oversight and Accountability

- **Implementation Administrator:** The District will fund and work in partnership with their Implementation Administrator who will conduct weekly site visits and provide external accountability.
- **Communication:** The district agrees to communicate regularly with OPI staff by responding in a timely manner to emails, participating in all required intensive support network meetings and activities, and preparing reports as outlined in the intensive assistance timeline.
- **Reporting to the BPE:** The District will provide biannual progress reports to the BPE and participate in the Intensive Support Network for the duration of the intervention and up to three years post-exit.
- **Compliance:** Failure to demonstrate the requisite level of progress or failure to participate in any phase of the process within the three-year window will result in non-accredited status.



## **Duration**

This agreement shall remain in effect for the three-year duration of the Intensive Assistance process, beginning [Start Date] and concluding [End Date]. During this period, the school will complete only the off-cycle accreditation components, and bypass ESSA school improvement activities, as this intensive assistance process serves as the alternative process for both of these requirements. The variance to standard accreditation process (ARM 10.55.604) will remain available for schools in intensive assistance to seek allowable flexibilities while creating their redesign plans. Following the conclusion of the intensive assistance, the BPE will evaluate the school's status to determine if it will return to regular accreditation, regular with minor deviations, or be designated as non-accredited.

---

## **Signatures:**

---

**Superintendent/Principal, [District Name]**

Date: \_\_\_\_\_

---

**Board Chair, [District Name]**

Date: \_\_\_\_\_

---

**Superintendent, Office of Public Instruction**

Date: \_\_\_\_\_

---

**Chair, Montana Board of Public Education**

Date: \_\_\_\_\_

## **ITEM 17**

### **WRAP UP AND FINAL THOUGHTS**

**Dr. Tim Tharp  
Jordann Lankford Forster**

**July 24, 2026**

**CALL TO ORDER**

- A. Pledge of Allegiance**
- B. Roll Call**
- C. Statement of Public Participation**
- D. Welcome Visitors**

❖ **CHARTER SCHOOL COMMITTEE – (Items 18-19)**

**Lisa Schmidt**

**ITEM 18**

**UPDATE ON COMMUNITY CHOICE  
SCHOOLS COMMISSION**

**Cathy Kincheloe**



# Commission Guidebook for the Application Process and Oversight of Local School District Authorizers of Community Choice Schools

## Table of Contents

|     |                                                   |    |
|-----|---------------------------------------------------|----|
| 1.  | Application Proposal Review Policy.....           | 1  |
| 2.  | Application .....                                 | 3  |
| 3.  | Application Evaluation Criteria .....             | 7  |
| 4.  | Approval Letter .....                             | 12 |
| 5.  | Denial Letter .....                               | 13 |
| 6.  | Contract .....                                    | 14 |
| 7.  | Annual Calendar of Reporting Requirements .....   | 26 |
| 8.  | Renewal Application Template .....                | 28 |
| 9.  | Renewal Application Recommendation Template...    | 30 |
| 10. | Renewal Determination Policy.....                 | 33 |
| 11. | Renewal Status Notice Template .....              | 34 |
| 12. | Corrective Action Intervention Process .....      | 36 |
| 13. | Notice of Corrective Action Intervention .....    | 39 |
| 14. | Corrective Action Intervention Plan Template..... | 40 |
| 15. | Rescission Process .....                          | 43 |
| 16. | Notice of Rescission .....                        | 44 |
| 17. | Petition to Transfer Authorizers .....            | 45 |
| 18. | Authorizer Registration Log .....                 | 49 |



## Authorizer of Community Choice Schools Application Proposal Review Policy

### February

1. Request for Proposals Released: The Community Choice Schools Authorizer Application Deadline will be issued and posted by March 1<sup>st</sup> of each year on the [Board of Public Education's \(BPE\) website](#) under the Community Choice Schools tab. The Authorizer Application will be broadly publicized statewide. The full Application Proposal comprises two phases. Phase I: Written Application and Phase II Applicant Interview.

### March-August

2. On-going General Information Sessions: Potential Applicants will have an opportunity to engage in orientation sessions pertaining to the upcoming Application Cycle. Logistics about General Information Sessions will be posted on [bpe.mt.gov](#) under the Community Choice Schools tab.
3. Notice of Intent: Applicants send the Commission a Notice of Intent to apply to be an Authorizer of Community Choice Schools no later than August 15.
4. Written Application Platform Access: Once Applicants have submitted a Notice of Intent, they may begin submitting requests to access the written application platform in which they will be able to begin drafting their Application before final submission.

### September

5. Phase I Written Applications Due: Authorizer Applications can be submitted to the Commission on (09/XX/XX) until 5:00 p.m., Mountain Time. All Applications must be submitted electronically via the Application Platform.
6. Receipt of Written Application: The Commission will notify each Applicant by email within 24 hours of receipt of the Application and provide an outline of the application review timeframe.
7. Public Posting: Each complete Authorizer Application will be published on [bpe.mt.gov](#) under the Choice Schools tab along with directions for submitting public comment, allowing the public to read each Application and submit public comment before the Commission takes official action. Written public comment will be closed one week prior to Deliberation in order for the Director to compile and distribute comments to Members.
8. Written Application Review: The Commission and the Director will evaluate each Application based on the Authorizer Application Evaluation Criteria.

### October

9. Phase II Applicant Interviews: In an open meeting, the Commission will conduct an interview with each Applicant Team. The interview allows the Commission to ask targeted questions seeking clarification on content submitted in the Application and to go deeper into the Applicant Team's commitment to execute the duties of a choice school authorizer. This constitutes a complete Application Proposal Review Process. Interviews will be open to the public and provide local residents, along with all members of the public, the opportunity to provide input on each complete Authorizer Application before Authorizer Applications are considered for approval or denial by the Commission.

### November

10. Application Deliberation: The Commission will convene no later than **60 business days** after (XX/XX/XX—date of the Application Deadline) to rule by resolution on each Application individually in an open meeting.

*This Application Cycle is for Community Choice School Authorizers.*



11. Application Approval: Applicants will be notified via phone and in writing of the approval. Approved Applications will advance to the Contracting stage.
12. Application Denial: Denied Applications will be provided with a written explanation as to why the Application was denied, and Applicants may re-apply in any future Application Cycle.

**December**

13. Authorizer Contracting: Contracts will be signed within 30 business days of approval, provided the Applicant agrees to the terms of the Commission's proposed contract.



# Authorizer of Community Choice Schools Application

(application date)



## Introduction

The Montana Community Choice Schools Commission (Commission) is issuing this Request for Applications for the establishment of Community Choice Schools Authorizers in Montana, in accordance with statutory requirements. The Commission seeks applications that align with its strategic vision for chartering schools. Further information pertaining to Commission law and the Commission's strategic vision, policies and procedures can be found on the Choice Schools tab on the [Board of Public Education's](#) website.

## Application Guidelines

Applicants interested in submitting an application to become a Community Choice Schools Authorizer in Montana must follow these requirements:

1. Applicants must be a local school board in the State of Montana;
2. The complete application narrative may not exceed 50 pages, not including exhibits such as budgets, letters of support, market research reports, etc.;
3. Follow all submission instructions; and
4. Adhere to application deadlines.

## Application Submission and Review Process

The process for submitting and reviewing an application to become a Community Choice Schools Authorizer in Montana will include the following:

1. Electronic submission of the Application on the published due date;
2. Written notification by email upon receipt of the Authorizer Application;
3. A thorough evaluation of the written Applications and interview;
4. An interview, in-person or by webinar, with each Applicant Team;
5. Approval or denial decisions will be adopted in an open meeting of the Commission;
6. Approved applications will be granted an Authorizing Contract for an initial term of 6 years; and
7. Denied applicants will receive clear reasons for denial and may reapply in future application cycles.

## Selection Criteria

In reviewing and selecting which applications to approve, the Commission will ensure that all applications reviewed will be approved or denied based on a review of the completeness and quality of information provided in the application. In reviewing and selecting which applications to approve, the Commission will ensure the following:

1. Selection criteria are aligned with nationally recognized principles and standards for authorizing;
2. Selection decisions are based on documented evidence collected through the Application review process;
3. The Commission will follow review and approval policies and practices that are transparent and are based on merit and avoid conflicts of interest or any appearance of conflicts of interest;
4. Application approval will only be granted to applicants that have demonstrated competence in each element of the published approval criteria and are likely to authorize successful Community Choice Schools; and
5. Applicants showing a commitment to seek out and serve students at-risk of academic failure, academic disengagement, to advance Montana's commitment to the preservation of American Indian cultural integrity, or to eliminate the American Indian achievement gap will be considered with greatest eagerness in the application process.

## Application Components

| Applicant Information                                    |  |      |  |
|----------------------------------------------------------|--|------|--|
| Local School Board Name                                  |  | Date |  |
| Local School Board Address                               |  |      |  |
| Phone Number                                             |  |      |  |
| Name of Individual Submitting this Application           |  |      |  |
| Position on Local School Board                           |  |      |  |
| E-mail Address of Individual Submitting this Application |  |      |  |

### Application Content

Please submit the following information

1. Notice of Intent: Per [20-11-107\(3\)\(c\)\(i\), MCA](#), provide a written notification of the local school board's intent to serve as a Community Choice Schools Authorizer in accordance with the law.
2. Strategic Vision: Per [20-11-107\(3\)\(c\)\(ii\), MCA](#), provide an explanation of the local school board's strategic vision for authorizing.
3. Strategic Vision Plan: Per [20-11-107\(3\)\(c\)\(iii\), MCA](#), provide a plan supporting the local school board's strategic vision and an explanation of the local school board's budget and personnel capacity and commitment to execute the duties of Community Choice Schools authorizing.
4. Draft Request for Proposal: Per [20-11-107\(3\)\(c\)\(iv\), MCA](#), provide a draft or preliminary outline of a request for proposal that will solicit Community Choice Schools applicants.
5. Performance Framework: Per [20-11-107\(3\)\(c\)\(v\), MCA](#), provide a description or outline of the Performance Framework the local school board will use as an Authorizer to guide the establishment of a Charter Contract and for ongoing oversight and evaluation of Community Choice Schools.
6. Renewal, Revocation, Nonrenewal, School Closure: Per [20-11-107\(3\)\(c\)\(vi\), MCA](#), provide a draft of the local school board's renewal, revocation, nonrenewal, and school closure process. These processes must be consistent with [20-11-117, MCA](#) and [20-11-118, MCA](#).
7. Assurances: Per [20-11-107\(3\)\(c\)\(vii\), MCA](#), provide a statement of assurance that the local school board commits to the following:
  - a. Serving as a Community Choice Schools Authorizer in fulfillment of the expectations, spirit, and intent of the Montana Community Choice Schools Act; and
  - b. Will fully participate in any Authorizer training provided by or required by the Montana Community Choice Schools Commission.
8. Assurances for Transparency: Per [20-11-107\(3\)\(c\)\(viii\), MCA](#), provide a statement of assurance that the local school board will be accountable and transparent in all matters concerning authorizing practices, decisions, and expenditures.

## Appendix A Signed Disclosure Forms

THIS FORM MUST BE COMPLETED BY EACH MEMBER OF THE LOCAL SCHOOL BOARD

The intent of this form is to identify any potential conflicts of interest that may be created in the event the Authorizer Application is approved. Members of the Local School Board are asked to complete this form based on knowledge of affiliations at the time of submission of the application. If a conflict of interest concern is identified, the Commission reserves the right to refer the matter to its Executive Committee for resolution prior to the approval of the Authorizer Application.

| <b>Instructions: If you answer “yes” to any of the following questions, please provide an explanation on a separate sheet of paper. Please label explanations with the number of the corresponding question.</b> |                                                                                                                                                                                                                                                                                                                                                 | <b>No</b> | <b>Yes</b> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------|
| 1.                                                                                                                                                                                                               | Do or will you, your spouse, or any member of your immediate family have any ownership interest in any educational service provider (ESP), charter school management organization (CMO), or any other company that may contract with a proposed Community Choice School?                                                                        |           |            |
| 2.                                                                                                                                                                                                               | Are or will you, your spouse or any member of your immediate family be employed by a proposed Community Choice School or its contractors?                                                                                                                                                                                                       |           |            |
| 3.                                                                                                                                                                                                               | Did or do you or your spouse, or other members of your immediate family, have ownership interest, directly or indirectly, in any corporation, partnership, association or other legal entity which would answer “yes” to any of the questions 1 or 2?                                                                                           |           |            |
| 4.                                                                                                                                                                                                               | Do you currently serve as a member of the board of any Community Choice School?                                                                                                                                                                                                                                                                 |           |            |
| 5.                                                                                                                                                                                                               | Do you currently serve as a public official?                                                                                                                                                                                                                                                                                                    |           |            |
| 6.                                                                                                                                                                                                               | Have you, your spouse or any member of your immediate family applied to establish or participated in the establishment of a Community Choice School?                                                                                                                                                                                            |           |            |
| 7.                                                                                                                                                                                                               | To the best of your knowledge, are there situations not described above that may give the appearance of a conflict of interest between you and a proposed Community Choice School, or which would make it difficult for you to discharge your duties or exercise your judgment independently on behalf of the proposed Community Choice School? |           |            |
| Printed Name:                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                 |           |            |
| Title:                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                 |           |            |
| Signature:                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                 | Date:     |            |

| Applicant Signature                                                                                                                                                                                                                                                                                             |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| As the person responsible for submitting this application, I verify that all the information included in this application is accurate and complete to the best of my knowledge. In addition, I do hereby certify to the assurances contained in Questions 7 and 8 contained above in the application narrative. |  |
| Applicant's Signature                                                                                                                                                                                                                                                                                           |  |
| Date                                                                                                                                                                                                                                                                                                            |  |



## Proposed Authorizer of Community Choice Schools Application Criteria

Per the Community Choice Schools Commission (Commission)'s Authorizer application process, this rubric will be used to evaluate each received application. The review and approval of an application is based on the contents and quality of the application.

Within each application section, please check the **Rating** that best describes the extent to which the Applicant met expectations for opening and operating a quality school.

- **Exceeds:** The response demonstrates a strong understanding of key issues and demonstrates capacity to authorize and oversee quality Community Choice Schools. It goes above and beyond expectations with supporting evidence.
- **Meets:** The response demonstrates an understanding of key issues and demonstrates capacity to authorize and oversee quality Community Choice schools.
- **Partially Meets:** The response meets some of the criteria but lacks meaningful detail or requires additional information in one or more key areas.
- **Does Not Meet:** The response is significantly incomplete; lacks meaningful detail; demonstrates lack of preparation; and/or otherwise raises substantial concerns about the applicant's understanding of and ability to implement an effective authorizing plan, including if the applicant does not respond to the required section.

The Overall Section Rating will be used to provide a holistic evaluation of the section, including overall clarity of the plan presented within the section.

\*General Disclaimer: Starting and operating a quality Authorizer of Community Choice School requires elements both tangible and intangible on the part of the Applicant and the proposed plan. *The purpose of this rubric is to aid the Commission evaluators in having a rigorous discussion about the applications while making a final determination and in providing feedback to the Applicants.* The Commission members reserve the right to approve or deny applications regardless of an application's perceived score or an evaluator's recommendation. Additionally, not all rating categories are considered equally, as some merit greater value to the overall likelihood of operating as a successful Authorizer of Choice Schools.

### Evaluation Criteria Table of Contents

|               |                                                         |
|---------------|---------------------------------------------------------|
| Section I:    | Notice of Intent                                        |
| Section II:   | Strategic Vision                                        |
| Section III:  | Strategic Vision Plan                                   |
| Section IV:   | Draft or Preliminary Outline of the RFP Process         |
| Section V:    | Performance Framework                                   |
| Section VI:   | Renewal, Non-Renewal, Revocation, and Closure Processes |
| Section VII:  | Assurances                                              |
| Section VIII: | Assurances for Transparency                             |
| Section IX:   | Appendix A Signed Disclosures                           |
| Section X:    | Summary and Recommendation                              |



| Section I: Notice of Intent                                                                                             |                            |  |                    |
|-------------------------------------------------------------------------------------------------------------------------|----------------------------|--|--------------------|
| <b>Description:</b> The applicant submitted written notification of the local board's intent to serve as an authorizer. |                            |  |                    |
|                                                                                                                         | Does Not Meet the Standard |  | Meets the Standard |

| Section II: Strategic Vision                                                |                            |  |                              |                  |                    |  |                      |
|-----------------------------------------------------------------------------|----------------------------|--|------------------------------|------------------|--------------------|--|----------------------|
| <b>Description:</b> The applicant's strategic vision is clear and complete. |                            |  |                              |                  |                    |  |                      |
| Areas of Strength                                                           |                            |  |                              | Areas of Concern |                    |  |                      |
| •                                                                           |                            |  |                              | •                |                    |  |                      |
| Questions                                                                   |                            |  |                              |                  |                    |  |                      |
| •                                                                           |                            |  |                              |                  |                    |  |                      |
|                                                                             | Does Not Meet the Standard |  | Partially Meets the Standard |                  | Meets the Standard |  | Exceeds the Standard |

| Section III: Strategic Vision Plan                                                                                                                                                                                                                                   |                            |  |                              |                  |                    |  |                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|--|------------------------------|------------------|--------------------|--|----------------------|
| <b>Description:</b> The applicant has a strong plan in place to support the local board's strategic vision. The plan includes an explanation of the Local School Board's budget, personnel capacity, and a strong commitment to execute the duties of an authorizer. |                            |  |                              |                  |                    |  |                      |
| Areas of Strength                                                                                                                                                                                                                                                    |                            |  |                              | Areas of Concern |                    |  |                      |
| •                                                                                                                                                                                                                                                                    |                            |  |                              | •                |                    |  |                      |
| Questions                                                                                                                                                                                                                                                            |                            |  |                              |                  |                    |  |                      |
| •                                                                                                                                                                                                                                                                    |                            |  |                              |                  |                    |  |                      |
|                                                                                                                                                                                                                                                                      | Does Not Meet the Standard |  | Partially Meets the Standard |                  | Meets the Standard |  | Exceeds the Standard |

#### Section IV: Draft or Preliminary Outline of the Request for Proposal Process

**Description:** The applicant has provided a draft or preliminary outline of a request for proposal to solicit choice school applicants.

| Areas of Strength |                            |  |                              | Areas of Concern |                    |  |                      |
|-------------------|----------------------------|--|------------------------------|------------------|--------------------|--|----------------------|
| •                 |                            |  |                              | •                |                    |  |                      |
| Questions         |                            |  |                              |                  |                    |  |                      |
| •                 |                            |  |                              |                  |                    |  |                      |
|                   | Does Not Meet the Standard |  | Partially Meets the Standard |                  | Meets the Standard |  | Exceeds the Standard |

#### Section V: Performance Framework

**Description:** The applicant has submitted a well-defined and clearly thought-out description or outline of the performance framework it will use to guide the establishment of a contract and ongoing oversight and evaluation of its choice schools.

| Areas of Strength |                            |  |                              | Areas of Concern |                    |  |                      |
|-------------------|----------------------------|--|------------------------------|------------------|--------------------|--|----------------------|
| •                 |                            |  |                              | •                |                    |  |                      |
| Questions         |                            |  |                              |                  |                    |  |                      |
| •                 |                            |  |                              |                  |                    |  |                      |
|                   | Does Not Meet the Standard |  | Partially Meets the Standard |                  | Meets the Standard |  | Exceeds the Standard |

#### Section VI: Renewal, Non-Renewal, Revocation, and Closure Processes

**Description:** The applicant has provided a draft of the Local School Board's renewal, revocation, nonrenewal, and school closure processes. The processes are consistent with Montana Code 20-11-117 and 20-11-118.

| Areas of Strength |                            |  |                              | Areas of Concern |                    |  |                      |
|-------------------|----------------------------|--|------------------------------|------------------|--------------------|--|----------------------|
| •                 |                            |  |                              | •                |                    |  |                      |
| Questions         |                            |  |                              |                  |                    |  |                      |
| •                 |                            |  |                              |                  |                    |  |                      |
|                   | Does Not Meet the Standard |  | Partially Meets the Standard |                  | Meets the Standard |  | Exceeds the Standard |

## Section VII: Assurances

**Description:** The applicant has provided a statement of assurance that the Local School Board commits to serving as a choice school authorizer in fulfillment of the expectations, spirit, and intent of the Montana Community Choice Schools Act and that it will fully participate in any authorizer training provided by or required by the Montana Community Choice Schools Commission.

Does Not Meet the Standard

Meets the Standard

## Section VIII: Assurances for Transparency

**Description:** The applicant provided a statement of assurance that the Local School Board will be accountable and transparent in all matters concerning authorizing practices, decisions, and expenditures.

Does Not Meet the Standard

Meets the Standard

## Section IX: Appendix A Signed Disclosure Forms

**Description:** The applicant provided a statement of assurance that the Local School Board will be accountable and transparent in all matters concerning authorizing practices, decisions, and expenditures.

Does Not Meet the Standard

Meets the Standard

## Summary Evaluation and Recommendation

In accordance with [MCA 20-11-108 \(4\)\(a-e\)](#), the proposed Authorizer must demonstrate the ability to develop, carry out, and maintain authorizing policies and practices consistent with nationally recognized principles and standards for authorizing in all major areas of authorizing responsibility, including:

- (a) organizational capacity and infrastructure;
- (b) soliciting and evaluating choice school proposals;
- (c) performance contracting;
- (d) ongoing community choice school oversight and evaluation; and
- (e) Community Choice contract renewal decision making.

Areas of Strength

Areas of Weakness/Concern

•

•

| Final Rating Determination |                                                                                                                                                                                                                                                                                                                                 |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Overall Rating             | Rating Definition                                                                                                                                                                                                                                                                                                               |
|                            | <b>Exceeds:</b> The response demonstrates a strong understanding of key issues and demonstrates capacity to open and operate a quality Community Choice school. It goes above and beyond expectations with supporting evidence.                                                                                                 |
|                            | <b>Meets:</b> The response demonstrates a thorough understanding of key issues and demonstrates capacity to open and operate a quality Community Choice school. It addresses the topic with specific evidence that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.     |
|                            | <b>Partially Meets:</b> The response meets some of the criteria but lacks meaningful detail or requires additional information in one or more key areas.                                                                                                                                                                        |
|                            | <b>Does Not Meet:</b> The response is significantly incomplete; lacks meaningful detail; demonstrates lack of preparation; and/or otherwise raises substantial concerns about the applicant's understanding of and ability to implement an effective plan, including if the applicant does not respond to the required section. |



Date

Dear Applicant Name,

On behalf of the Montana Community Choice Schools Commission, I am pleased to inform you that your application to be considered as a Community Choice School Authorizer has been approved. After a thorough and rigorous evaluation of your written application, we find that your proposal has met the high standards required for authorization.

Your application demonstrated a strong alignment with the strategic vision of the Commission and with the statutory requirements outlined in the Montana Community Choice Schools Act. The Commission commends your commitment to fostering high-quality educational opportunities through transparent and accountable authorizing practices.

As an approved authorizer, your local school board is now granted an initial six-year authorizing contract, which you will receive soon.

We look forward to working collaboratively with your board to ensure the success of Montana's Community Choice Schools. Should you have any questions, please do not hesitate to contact us. Congratulations, again, on your approval!

Best,

Commission Chair Name

Montana Community Choice Schools Commission Chair



Date

Dear Name,

Thank you for submitting your application to serve as a Community Choice School Authorizer in Montana. The Montana Community Choice School Commission (Commission) has completed a thorough review of your proposal in accordance with the statutory requirements and selection criteria outlined in the Montana Community Choice Schools Act.

After careful consideration, the Commission has determined that your application does not meet the necessary standards for approval at this time.

While your application demonstrated a commitment to expanding access to Community Choice schools, the Commission identified areas requiring further development. We encourage you to review the feedback provided in the attached evaluation summary for more detailed guidance.

We recognize the effort and dedication that went into your submission and encourage you to consider revising and resubmitting your application in the future. The Commission remains committed to supporting local school boards in building strong, sustainable authorizing practices that align with the goals of the Community Choice Schools Act.

If you have any questions, please feel free to contact our office. Thank you, again, for your interest in advancing educational opportunities for Montana students.

Best,

Commission Chair Name

Montana Community Choice Schools Commission Chair





# Contract for Authorization of Community Choice Schools

|                                                        |                                                                                                    |
|--------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| Local School Board Name                                |                                                                                                    |
| Authorizer Contract Start Date                         |                                                                                                    |
| Authorizer Contract Expiration Date                    |                                                                                                    |
| The following Exhibits are included with this Contract | Exhibit A: Authorizer's Application<br>Exhibit B: Authorizer's Choice School Performance Framework |
| Notices to the Commission<br>Address and Email         |                                                                                                    |
| Notices to the Local School Board<br>Address and Email |                                                                                                    |

# Table of Contents

## **SECTION 1 DEFINITIONS**

|                                      |   |
|--------------------------------------|---|
| Section 1.1 Certain Definitions..... | 4 |
|--------------------------------------|---|

## **SECTION 2 CONTRACT TERM**

|                       |   |
|-----------------------|---|
| Section 2.1 Term..... | 5 |
|-----------------------|---|

## **SECTION 3 COMMISSION-AUTHORIZER RELATIONSHIP**

|                                                               |   |
|---------------------------------------------------------------|---|
| Section 3.1 Parties.....                                      | 5 |
| Section 3.2 Independent Status of the Commission.....         | 5 |
| Section 3.3 Independent Status of the Local School Board..... | 5 |

## **SECTION 4 COMMISSION RESPONSIBILITIES**

|                                                         |   |
|---------------------------------------------------------|---|
| Section 4.1 Commission Oversight Responsibilities ..... | 6 |
| Section 4.2 Annual Report.....                          | 6 |

## **SECTION 5 LOCAL SCHOOL BOARD RESPONSIBILITIES AS AN AUTHORIZER**

|                                                                     |   |
|---------------------------------------------------------------------|---|
| Section 5.1 Authority to Authorize.....                             | 6 |
| Section 5.2 Authorizing Responsibilities of Local School Board..... | 6 |
| Section 5.3 Delegation of Duties.....                               | 7 |
| Section 5.4 Authorizing Policies.....                               | 7 |
| Section 5.5 Annual Report Required information.....                 | 7 |
| Section 5.6 Conflict of Interest.....                               | 8 |
| Section 5.7 Notice to the Commission .....                          | 8 |

## **SECTION 6 OVERSIGHT FEE**

|                                |   |
|--------------------------------|---|
| Section 6.1 Oversight Fee..... | 8 |
|--------------------------------|---|

## **SECTION 7 RENEWAL, NON-RENEWAL SPECIAL REVIEW, REVOCATION AND TRANSFER**

|                                                                           |   |
|---------------------------------------------------------------------------|---|
| Section 7.1 Renewal.....                                                  | 9 |
| Section 7.2 Non-Renewal.....                                              | 9 |
| Section 7.3 Special Review.....                                           | 9 |
| Section 7.4 Revocation.....                                               | 9 |
| Section 7.5 Transfer of Local School Board's Choice School Contracts..... | 9 |
| Section 7.6 Wind-up and Dissolution.....                                  | 9 |

**SECTION 8**  
**GENERAL PROVISIONS**

|                                                             |    |
|-------------------------------------------------------------|----|
| Section 8.1 Order of Precedence.....                        | 10 |
| Section 8.2 Amendments .....                                | 10 |
| Section 8.3 Merger.....                                     | 10 |
| Section 8.4 Non-Assignment.....                             | 10 |
| Section 8.5 Governing Law and Enforceability .....          | 10 |
| Section 8.6 No Third-Party Beneficiary.....                 | 10 |
| Section 8.7 No Waiver.....                                  | 10 |
| Section 8.8 Notice.....                                     | 10 |
| Section 8.9 Severability .....                              | 11 |
| Section 8.10 Referenced Law, Policies, and Procedures ..... | 11 |
| Section 8.11 Survival of Certain Contract Terms.....        | 11 |

# AUTHORIZER CONTRACT

his authorizer contract (the “Contract”) by and between the Community Choice School Commission (“Commission”) and the Local School Board identified on the Cover Page of this Contract, is effective as of [Effective Date]. The parties agree to the following Terms and Conditions:

## SECTION 1: DEFINITIONS

### 1.1 Certain Definitions.

For purposes of this Contract, and in addition to the terms defined throughout this Contract, each of the following words or expressions shall have the meaning set forth in this section:

- a. **Annual Calendar of Reporting Requirements** means the compliance certification and submission duties required of the Authorizer by the Commission. The Commission may amend the Annual Calendar of Reporting Requirements each fiscal year or at other times as deemed appropriate by the Commission. These changes shall be automatically incorporated into the Contract and shall be exempt from the Contract amendment procedures set forth in this Contract. The Annual Calendar of Reporting Requirements will be available on the Commission’s website (insert website address) and published no later than June 15 for the following fiscal year.
- b. **Applicant** means a group that submits a proposal to become an Authorizer of community choice schools.
- c. **Authorizer** means the Commission or a local school board approved by the Commission to act as a choice school Authorizer within the boundaries of the designated traditional school district overseen by the local school board.
- d. **Authorizer Contract** means a fixed-term, renewable contract between the Community Choice School Commission and the Local School Board that outlines the roles, powers, responsibilities, and expectations for each party to the contract.
- e. **Charter Contract** means a fixed-term, renewable contract between a community choice school and an authorizer that outlines the roles, powers, responsibilities, and performance expectations for each party to the contract.
- f. **Commission** means the community choice school commission provided for in the Community Choice Schools Act, MCA 20-11-106.
- g. **Community choice school** or **choice school** means a public school that has autonomy over decisions, including but not limited to matters concerning finance, board governance, personnel, scheduling, curriculum, and instruction; is governed by a governing board; is established and operated under the terms of a charter contract between the school’s governing board and its Authorizer; is a school in which parents choose to enroll their children; is a school that admits students based on capacity and then on the basis of lottery if more students apply for admission than can be accommodated; provides a program of education that may include any or all grades from kindergarten through grade 12 and vocational education programs; operates in pursuit of a specific set of educational objectives as defined in its charter contract; operates under the oversight of its Authorizer in accordance with its charter contract; and establishes graduation requirements and has authority to award degrees and issue

diplomas.

- h. **Education service provider** means a for-profit education management organization, nonprofit education management organization, school design provider, or other partner entity with which a community choice school or Authorizer intends to contract for educational design, implementation, or comprehensive management.
- i. **Governing board or Board** means an independent volunteer board of trustees of a community choice school that is a party to the charter contract with the Authorizer.
- j. **Local school board** means a traditional school district board of trustees exercising management and control over a traditional local school district pursuant to the laws of the state.
- k. **Parent** means a parent, guardian, or other person or entity having legal custody of a child.
- l. **Resident school district** means the public school district in which a student resides.
- m. **Student** means a child who is eligible for attendance in a public school in the state.
- n. **Traditional public school** means a traditional public school that is under the direct management, governance, and control of a local school board or the state.
- o. **Virtual community choice school** means a community choice school headquartered in Montana that offers educational services predominately through an online program.

## SECTION 2: CONTRACT TERM

### 2.1 Term.

This Contract is effective as of the date of execution for a term of six years (6 years), to expire on [Expiration Date]. This Contract may be renewed in accordance with Section 7, below.

## SECTION 3: COMMISSION-AUTHORIZER RELATIONSHIP

### 3.1 Parties.

This Agreement is entered into between the (Local School Board Name) (“Local School Board”) and the Commission.

### 3.2 Independent Status of the Commission.

The Commission is an authorizing body as defined by the Community Choice Schools Act. In approving this Contract, the Commission voluntarily exercises its powers given to it under the Community Choice Schools Act, MCA 20-11-101 through -126. Nothing in this Contract shall be deemed to be any waiver of the Commission’s powers or independent status and the Local School Board shall not be deemed to be part of the Commission.

### 3.3 Independent Status of the Local School Board.

The Local School Board is the elected board of a public school district approved to act as an Authorizer by the Community Choice School Commission and the Community Choice Schools Act. The Local School Board is not a division or part of the Commission. The relationship between the Local School Board and the Commission is

based solely on the applicable provisions of the Community Choice Schools Act and the terms of this Contract, or other agreements between the Commission and Local School Board, if applicable.

## **SECTION 4: COMMISSION RESPONSIBILITIES**

### **4.1 Commission Oversight Responsibilities.**

The Commission is responsible for overseeing the performance and effectiveness of the Local School Board as an Authorizer.

### **4.2 Annual Report.**

By October 15 of each year, the Commission will provide the requirements for the format, content, and submission of the annual report to be provided by the Local School Board in its authorizing capacity. The Commission will provide this information on its website.

## **SECTION 5: LOCAL SCHOOL BOARD RESPONSIBILITIES AS AN AUTHORIZER**

### **5.1 Authority to Authorize.**

The Local School Board is granted authority to act as an authorizer of Choice Schools for the term granted in Section 2.1 of this Contract. The Local School Board shall act as the authorizer from year to year during the term of this Contract as long as it fulfills the authorizing duties and expectations set forth in this Contract and the Choice Schools Act, and remains in good standing with the Commission.

### **5.2 Authorizing Responsibilities of Local School Board.**

The Local School Board shall monitor the performance and legal compliance of the Choice Schools that it authorizes, including the collecting and analyzing of data to support ongoing evaluations in accordance with its Choice School Contracts. The Local School Board shall also execute the following essential powers and duties:

- a. Solicit and evaluate choice school proposals, consistent with MCA 20-11-111;
- b. Approve choice school proposals that meet identified educational needs and promote a diversity of educational choices, as specified in MCA 20-11-108(1)(b);
- c. Decline to approve inadequate choice school proposals;
- d. Negotiate and execute sound charter contracts with each approved choice school
- e. By March 1 prior to a choice school's first year of operation, provide an estimate of the choice school's enrollment broken down by resident school districts to the superintendent of public instruction for review and possible adjustment, pursuant to MCA 20-11-124(2);
- f. By February 1, communicate to the superintendent of public instruction the percentage of the basic entitlement amount under MCA 20-9-306 to be included in the located school district's general funding budget, pursuant to MCA 20-11-124(2);
- g. Monitor the performance and legal compliance of choice schools in accordance with its Charter Contract terms and MCA 20-11-117(4)(a);
- h. In conjunction with each choice school it oversees, set annual performance targets designed to help



each school meet applicable federal, state, and authorizer expectations;

- i. Collect and analyze data from each choice school it oversees in accordance with the performance framework set forth in its Charter Contract;
- j. In the event of that a choice school's performance or legal compliance appears unsatisfactory, promptly notify the choice school of the perceived problem and provide a reasonable opportunity for the school to remedy the problem;
- k. By June 30 of each year, issue a choice school performance report and charter renewal application guide to any choice school whose Charter Contract will expire the following year, in accordance with MCA 20-11-117(5);
- l. Rule on choice school renewal applications within 30 days after filing, pursuant to MCA 20-11-117(8);
- m. Develop revocation and nonrenewal processes consistent with MCA 20-11-118(2);
- n. Determine whether each charter contract merits renewal, nonrenewal, or revocation;
- o. Develop a choice school closure protocol to ensure timely notification to parents, orderly transition of students and student records to new schools, and proper disposition of school funds, property, and assets in accordance with MCA 20-11-118(5) and the Choice Schools Act; and
- p. Oversee the closure and work with the closing choice school to ensure a smooth and orderly closure and transition for students and parents.

### **5.3 Delegation of Duties.**

The Local School Board may delegate its authorizing duties to its officers, employees, and contractors.

### **5.4 Authorizing Policies.**

The Local School Board will develop, carry out, and maintain authorizing policies and practices that are consistent with nationally recognized principles and standards in all major areas of authorizing responsibilities, including the following:

- a. Organizational capacity and infrastructure;
- b. Soliciting and evaluating choice school proposals consistent with the requirements of MCA 20-11-111;
- c. Performance contracting;
- d. Ongoing community choice school oversight and evaluation; and
- e. Charter contract renewal decisionmaking.

The Local Board will submit a copy of Board Approved policies to the Commission, as outlined in the Annual Calendar of Reporting Requirements.

### **5.5 Annual Report Required Information.**

The Local School Board shall submit an annual report to the Commission that summarizes the following information:

- a. The Local School Board's strategic vision for authorizing and progress toward achieving that vision;
- b. Academic and financial performance of all authorized operating choice schools overseen by the Local

School Board in its authorizing capacity, according to the performance expectations for choice schools set forward in the Community Choice Schools Act.

- c. The status of the Local School Board's authorized choice schools portfolio, identifying all choice schools approved but not yet open, operating, renewed, transferred, revoked, not renewed, voluntarily closed, or never opened;
- d. The authorizing functions provided by the Local School Board as an authorizer to the choice schools under its direction, including its operating costs and expenses detailed in annual audited financial statements that conform with generally accepted accounting principles; and
- e. The services purchased from the Local School Board as an authorizer by a choice school under its direction, including an itemized accounting of the actual costs of these services, as required in MCA 20-11-109.

#### **5.6 Conflict of Interest.**

An employee, trustee, agent, or representative of the Local School Board may not simultaneously serve as an employee, trustee, agent, representative, vendor, or contractor of a community choice school that it authorizes.

#### **5.7 Notice to the Commission**

The Local School Board, in its capacity as an authorizer, must report to the Commission (with copies of its report to the choice school involved as appropriate) if it does any of the following:

- a. Within 24 hours of a condition that may cause the Authorizer to vary from the terms of the Contract, or federal or state law.
- b. Within 24 hours of misconduct by the staff, and/or Authorizer.
- c. Within 10 days of making a decision to approve or deny a charter school proposal. The report must include a copy of the executed Charter Contract, if applicable, the Local School Board's resolution setting forth the action taken, reasons for the decision, and provide assurances of compliance with all procedural requirements and proposal elements set forth in MCA 20- 11-111; or
- d. Within 10 days of making a decision to renew, not renew, or revoke a charter contract. The report must include a copy of the Local School Board's resolution setting forth the action taken, the reasons for the decision, and provide assurance of compliance with MCA 20-11-118. Decisions reported to the Commission under this sub-section (b) may be appealed in writing within 30 days of the Commission's receipt of the Local School Board's report. In the event of an appeal, the Commission will set the matter for hearing at its next available meeting and will affirm, modify, or reverse the Local School Board's decision by the vote of a quorum of its members.
- e. Within 14 days of any complaints filed against the authorizer or its employees, administration, or Authorizer members by any governmental agency, except as may require immediate notice.

### **SECTION 6: OVERSIGHT FEE**

#### **6.1 Oversight Fee.**

The Commission shall establish a statewide formula for all Authorizers (Local School Boards) to use when

applying oversight fees to authorized schools.

## **SECTION 7: RENEWAL, NON-RENEWAL, SPECIAL REVIEW, TRANSFER, AND REVOCATION**

### **7.1 Renewal.**

In considering the renewal of this Contract, the Commission shall review the annual report submitted by the Local School Board, per Section 5.5. of this contract. If the Commission finds the annual report meets all requirements and finds that the Local School Board is fulfilling its duties as an authorizer under the Choice Schools Act and this Contract, the contract will be renewed for a period of time set by the Commission.

### **7.2 Non-Renewal.**

The Commission may choose not to renew this Contract if the Local School Board has not fulfilled its duties as an authorizer, has not met the expectations set forth in this Contract or in the Choice Schools Act, or if the Local School Board is no longer in good standing with the Commission. If the Commission does not renew this Contract, the Local School Board must work with the Commission to wind-up and dissolve in accordance with Section 7.6 of this Contract and the Choice Schools Act.

### **7.3 Special Review.**

Persistently unsatisfactory performance of a Local School Board's portfolio of choice schools, a pattern of well-founded complaints about the Local School Board or its choice schools, or a determination by the Commission that the Local School Board is not in compliance with this Contract, an existing Charter Contract, or any requirements under the Choice Schools Act may trigger special review of the Local School Board's authorizer status. To conduct its special review, the Commission will notify the Local School Board in writing of the identified problems and shall provide the Local School Board with an appropriate amount of time to respond and remedy the problems. Amounts of time granted will vary on the circumstances of the situation.

### **7.4 Revocation.**

The Commission may revoke this contract if any of the following occur:

- a. It finds evidence of material or persistent failure to carry out the duties in Section 5 of this Contract and MCA 20-11-108 by the Local School Board.
- b. If the Local School Board fails to respond and remedy any problems identified by the Commission within the granted amount of time, per Section 7.3.

If the Commission intends to revoke the Local School Board's authorizing contract, the Commission will notify the Local School Board with a reasonable amount of time under the circumstances, of its intent to revoke the Local School Board's authorizing authority, unless the Local School Board demonstrates a timely and satisfactory remedy for the identified violation or deficiencies.

### **7.5 Transfer of Local School Board's Choice School Contracts.**

The Local School Board may request, by special petition, permission from the Commission to transfer its Choice School contracts to the Commission before the expiration of the Choice School charter contract terms. The Commission will consider any petitions received under this Section on a case-by-case basis and may grant the transfer requests in response to special circumstances and if there is evidence that the transfer would serve the best interest of the Choice School's students.

### **7.6 Wind-up and Dissolution.**

In the event of revocation, non-renewal of the Local School Board's authorizing authority, or approved requests to transfer Charter Contracts held by the Local School Board, the Commission will manage the timely and orderly transfer of each Charter Contract held by the Local School Board to the Commission, with the mutual agreement of each affected choice school and proposed new authorizer. The Commission shall assume the existing Charter Contract(s) for the remainder of the Contract term.

## **SECTION 8: GENERAL PROVISIONS**

### **8.1 Order of Precedence.**

Any inconsistency between governing authorities may be resolved by giving precedence in the following order: applicable state and federal laws, regulations, and requirements; this Contract; Commission policies; the original Application; and other exhibits to this Contract.

### **8.2 Amendments.**

No amendment to this Contract will be valid unless ratified in writing by the Commission, approved by a quorum of the Commission and the Local School Board, and executed by authorized representatives of both parties.

### **8.3 Merger.**

This Contract, together with the Application and with the attachments and exhibits thereto, contains all terms, conditions, and provisions hereof and the entire understanding and all representations of the parties relating hereto. All prior representations, understandings, and discussions are merged herein and superseded and canceled by this Contract.

### **8.4 Non-Assignment.**

Except as herein specified, neither party to this Contract will assign or attempt to assign any rights, benefits, or obligations accruing to the party under this Contract unless the other party agrees in writing to any such assignment. Such consent will not be unreasonably withheld, conditioned, or delayed.

### **8.5 Governing Law and Enforceability.**

This Contract will be governed and construed according to the Constitution and laws of the State of Montana.

### **8.6 No Third-Party Beneficiary.**

The enforcement of the terms and conditions of this Contract and all rights of action relating to such enforcement will be strictly reserved to the parties. Nothing contained in this Contract will give or allow any claim or right of action whatsoever by any other or third person. It is the express intent of the parties to this Contract that any third party receiving services or benefits hereunder will be deemed an incidental beneficiary only.

### **8.7 No Waiver.**

The parties agree that no assent, expressed or implied, to any breach by either of them of any one or more of the provisions of this Contract will constitute a waiver of any other breach.

### **8.8 Notice.**

Unless otherwise specifically provided herein, any notice required or permitted under this Contract must be in writing and will be effective upon personal delivery or email delivery where an email address has been provided (subject to verification of service or acknowledgement of receipt), or three days after mailing when

sent by certified mail, postage prepaid by the sender, using the addresses listed on the Cover Page of this Contract. Either party may change the address for notice by giving written notice to the other party pursuant to this paragraph.

**8.9 Severability.**

If any provision of this Contract is determined to be unenforceable or invalid for any reason, the remainder of the Contract will remain in full force and effect, unless otherwise terminated by one or both of the parties in accordance with the terms contained herein. Either party may revoke this Contract if a material provision is declared unlawful or unenforceable by any court of competent jurisdiction and the parties do not successfully negotiate a replacement provision. The parties agree to meet and discuss in good faith any material changes in law that may significantly impact their relationship as set forth in the Contract.

**8.10 Referenced Laws, Policies, and Procedures.**

The parties agree that unless context clearly establishes otherwise, all references to applicable laws, statutes, rules, regulations, or policies are intended to include: (1) federal statutes and regulations, including interpretations and guidance from the responsible federal agencies; (2) state statutes and rules, including interpretations and guidance from the responsible state agencies; (3) Commission policies and procedures; and (4) local ordinances, if generally applicable to schools within the local government's jurisdiction.

**8.11 Survival of Certain Contract Terms.**

Any provision of this Contract that imposes an obligation on a party after termination or expiration of the Contract shall survive the termination or expiration of the Contract and shall be enforceable by the other party.

## Signature Page

THE PARTIES HERETO HAVE EXECUTED THIS CONTRACT.

|                                                                                                                                               |                                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <p><b>LOCAL SCHOOL BOARD</b><br/><b>[LOCAL SCHOOL BOARD NAME]</b></p> <p>By: _____<br/>Chairperson, Board of Directors</p> <p>Date: _____</p> | <p><b>CHOICE SCHOOL COMMISSION</b></p> <p>By: _____<br/>Chairperson, Commission</p> <p>Date: _____</p> |
|-----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|





## Authorizers Annual Calendar of Reporting Requirements

### Finalized Policies Required Prior to Opening a Choice School Application Cycle

| DUE DATE                                                   | REPORT DESCRIPTION                            | SUBMIT TO       |
|------------------------------------------------------------|-----------------------------------------------|-----------------|
| No more than 90 days after Authorizer contract is executed | Final RFP Process for Proposed Choice Schools | Epicenter- File |
|                                                            | Final Choice School Performance Framework     | Epicenter- File |
|                                                            | Final Choice School Application               | Epicenter- File |
|                                                            | Final Choice School Contract                  | Epicenter- File |
|                                                            | Final Choice School Renewal Policy            | Epicenter- File |
|                                                            | Final Choice School Corrective Action Policy  | Epicenter- File |
|                                                            | Final Choice Revocation Policy                | Epicenter- File |
|                                                            | Final Choice School Closure Policy            | Epicenter- File |

### Regular Reporting Requirements for Years 1-6 of Contract

| DUE DATE   | REPORT DESCRIPTION                                                                                                                                   | SUBMIT TO       |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| June 30    | Commission posts authorizer requirements for the format, content, and submission of the Authorizer Annual Report of CCS portfolio to the Commission. | Epicenter- File |
| November 1 | Submission of the Authorizer Annual Report that complies with Montana Code 20-11-108(6) based on data from the previous academic year.               | Epicenter- File |

### Notice Requirements

| DUE DATE        | REPORT DESCRIPTION                                                                                                                                                                                                                                                                                                                                       | SUBMIT TO       |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| Within 24 hours | Conditions that may cause the Authorizer to vary from the terms of the Contract, or federal or state law.                                                                                                                                                                                                                                                | Epicenter- File |
| Within 24 hours | Misconduct by the staff and/or Authorizer.                                                                                                                                                                                                                                                                                                               | Epicenter- File |
| Within 10 days  | Any decision to approve or deny a charter school proposal. The report must include a copy of the executed Charter Contract, if applicable, the Authorizer's resolution setting forth the action taken, reasons for the decision, and provide assurances of compliance with all procedural requirements and proposal elements set forth in MCA 20- 11-111 | Epicenter- File |
| Within 10 days  | Makes a decision to renew, not renew, or revoke a charter contract. The report must include a copy of the Authorizer's resolution setting forth the action taken, the reasons for the decision, and provide                                                                                                                                              | Epicenter- File |

|                |                                                                                                                                                                                                                       |                 |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
|                | assurance of compliance with MCA 20-11-118. Decisions reported to the Commission under this sub-section (b) may be appealed in writing within 30 days of the Commission's receipt of the Local School Board's report. |                 |
| Within 14 days | Any complaints filed against the authorizer or its employees, administration, or Authorizer members by any governmental agency, except as may require immediate notice.                                               | Epicenter- File |



# Authorizer Renewal Application

| Local School Board Authorizer Information |               |            |
|-------------------------------------------|---------------|------------|
| LSB Name                                  |               |            |
| Address                                   |               |            |
| Primary Contact Name                      |               |            |
| Primary Contact Phone                     |               |            |
| Primary Contact Email                     |               |            |
| Schools Currently Authorizing             |               |            |
| Name                                      | Grades Served | Enrollment |
|                                           |               |            |
|                                           |               |            |
|                                           |               |            |

## Table of Contents

- Section I: Authorizer Principles and Standards
- Section II: Improvements Undertaken
- Section III: Future Plans

## Section I: Evidence of Meeting Authorizer Principles and Standards

Provide evidence the Local School Board is applying nationally recognized authorizing principles and standards

| Principles | Evidence in Practice |
|------------|----------------------|
|            |                      |
|            |                      |
|            |                      |
| Standards  | Evidence in Practice |
|            |                      |
|            |                      |
|            |                      |
|            |                      |
|            |                      |

## Section II: Improvements Undertaken

What improvements has the Authorizer undertaken in the current contract?

## Section III: Future Plans

What modifications and or additions is the Authorizer planning for the next contract?



# Authorizer Renewal Application Subcommittee's Recommendation to the Commission

| Local School Board Authorizer Information |               |            |
|-------------------------------------------|---------------|------------|
| LSB Name                                  |               |            |
| Address                                   |               |            |
| Primary Contact Name                      |               |            |
| Primary Contact Phone                     |               |            |
| Primary Contact Email                     |               |            |
| Schools Currently Authorizing             |               |            |
| Name                                      | Grades Served | Enrollment |
|                                           |               |            |
|                                           |               |            |
|                                           |               |            |

## Section I: Sufficiency of evidence applying nationally recognized authorizing principles and standards

| Principles | Evidence in Practice |
|------------|----------------------|
|            |                      |
|            |                      |
|            |                      |
| Standards  | Evidence in Practice |
|            |                      |
|            |                      |
|            |                      |
|            |                      |
|            |                      |

## Section II: Impact of Improvements Undertaken

|  |
|--|
|  |
|--|

## Section III: Applicability of Future Plans Link to Annual Report Measures

|  |
|--|
|  |
|--|



|                            |  |
|----------------------------|--|
| Section IV: Recommendation |  |
| Approve                    |  |
| Rationale                  |  |
| Conditions                 |  |
| Deny                       |  |
| Feedback                   |  |



## Authorizer Renewal Determination Policy

### Policy

MCA 20-11-107 (4)(a) states the initial six year Authorizer contract is a renewable authorizing contract that (6) When approved by the Commission, the Local School Board continues as an Authorizer from year to year during the term of the contract as long as the Local School Board fulfills all authorizing duties and expectations set forth in this part and remains an Authorizer in good standing with the Commission. In alignment with these policies, the Commission will grant subsequent six year Authorizer contracts as long as the Authorizer is in good standing with the Commission.

The Commission will determine the Authorizer's standing based on the following criteria:

1. Fulfilling all Authorizer Responsibilities from 20-11-108
  - (4) An authorizer shall develop, carry out, and maintain authorizing policies and practices consistent with nationally recognized principles and standards for authorizing in all major areas of authorizing responsibility, including:
    - (a) organizational capacity and infrastructure;
    - (b) soliciting and evaluating choice school proposals;
    - (c) performance contracting;
    - (d) ongoing community choice school oversight and evaluation; and
    - (e) charter contract renewal decision making.
2. Authorizer Annual Reports compliant with 20-11-108(6) demonstrating responsible authorizing of quality Community Choice Schools consistent with nationally recognized principles and standards for authorizing as outlined in 20-11-108.

### Process

#### May

1. Renewal Procedures Meeting: The Commission Director will schedule a meeting with the Local School Board Authorizer to introduce the renewal process, provide the Renewal Application, and discuss any concerns regarding Authorizer performance.

#### November

1. Renewal Application: An Authorizer seeking to renew their contract, shall submit a Renewal Application with their Annual Report in year 5 of their contract on or before November 1. The Commission Authorizing Subcommittee and Director will review each Renewal Application and compile an Executive Summary for the Commission. The Executive Summary will include key data points and narrative from the application and a final recommendation for approval or denial of the contract.
2. Public Posting: The Renewal Application and Annual Report shall be posted on the Board of Public Education's website under the Community Choice Schools tab with directions for submission of written public comment.

#### December

1. Final Determination: The Commission shall rule by resolution on the Renewal Application no later than 30 days after the filing of the Renewal Application (12/XX/XX). Deliberations and vote will occur in a public meeting.
2. Authorizer Contracting: Contracts will be signed within 30 business days of approval.



Authorizer Renewal Status Notice

| Local School Board Authorizer Information |               |            |
|-------------------------------------------|---------------|------------|
| LSB Name                                  |               |            |
| Address                                   |               |            |
| Primary Contact Name                      |               |            |
| Primary Contact Phone                     |               |            |
| Primary Contact Email                     |               |            |
| Schools Currently Authorizing             |               |            |
| Name                                      | Grades Served | Enrollment |
|                                           |               |            |
|                                           |               |            |
|                                           |               |            |

| Section I: Evidence of Fulfilling Authorizer Responsibilities |
|---------------------------------------------------------------|
|                                                               |

## Section II: Final Renewal Decision

### Meeting Notes Containing Commission's Resolution

#### Approve

Rationale

Conditions

#### Deny

Feedback



## Authorizer Corrective Action Intervention Process

### Conditions for Authorizer Corrective Action Intervention

Preceding Corrective Action Intervention, the Commission Authorizing Subcommittee will have monitored the Authorizer's implementation of nationally recognized authorizing principles and standards and any potential violations of Authorizer Responsibilities as outlined in MCA 20-11-108 to determine if a recommendation to the Commission for Corrective Action Intervention is necessary. Upon receiving a recommendation for Corrective Action Intervention, the Commission will consider an Authorizer's context, additional quantitative and qualitative data, and other information to determine if Corrective Action Intervention is appropriate. The Commission will ultimately use professional judgment in determining whether, and at what level, to initiate intervention. The Commission reserves the right to forgo intervention or skip levels of intervention, including moving straight to revocation, as may be appropriate.

### Duties of Commission – Oversight of Authorizers MCA 20-11-109

- (5) Persistently unsatisfactory performance of an authorizer's portfolio of community choice schools, a pattern of well-founded complaints about the authorizer or its choice schools, or other objective circumstances may trigger a special review by the commission.
- (6) In reviewing or evaluating the performance of authorizers, the commission shall apply nationally recognized principles and standards for authorizing.
- (7) If at any time the commission finds that an authorizer is not in compliance with an existing charter contract, its authorizing contract with the commission, or the requirements of authorizers under this part, the commission shall notify the authorizer in writing of the identified problems and shall provide the authorizer reasonable opportunity to respond and remedy the problems.
- (8) If an authorizer fails to respond and remedy the problems identified by the commission, the commission shall notify the authorizer, within a reasonable amount of time under the circumstances, that it intends to revoke the authorizer's authority unless the authorizer demonstrates a timely and satisfactory remedy for the violation or deficiencies.
- (9) In the event of revocation of an authorizer's authority, the commission shall manage the timely and orderly transfer of each charter contract held by that authorizer to another authorizer in the state, with the mutual agreement of each affected choice school and proposed new authorizer. The new authorizer shall assume the existing charter contract for the remainder of the charter contract term.

### Authorizer Responsibilities MCA 20-11-108

- (1) In accordance with this part, an authorizer is responsible for executing the following essential powers and duties:
  - (a) soliciting and evaluating choice school proposals;
  - (b) approving choice school proposals that meet identified educational needs and promote a diversity of educational choices, including but not limited to:
    - (i) creating more schools with high standards for pupil performance;
    - (ii) closing achievement gaps between high-performing and low-performing groups of public school students;
    - (iii) increasing educational opportunities within the public education system;
    - (iv) providing alternative learning environments for students who are not thriving in traditional school settings;
    - (v) addressing the dropout rate;
    - (vi) creating new professional opportunities for teachers, leaders, and other school personnel;
    - (vii) encouraging the use of innovative models of teaching, delivering content, and providing other aspects of K-12 education; and
    - (viii) providing students, parents, community members, and other local and philanthropic entities with expanded opportunities for involvement in the public education system;
  - (c) declining to approve inadequate choice school proposals;
  - (d) negotiating and executing sound charter contracts with each approved choice school;
  - (e) monitoring, in accordance with charter contract terms, the performance and legal compliance of choice schools; and

- (f) determining whether each charter contract merits renewal, nonrenewal, or revocation.
- (2) An authorizer may delegate its duties to its officers, employees, and contractors.
- (3) Regulation of choice schools by authorizers is limited to the powers and duties described in this part, consistent with the intent of this part.
- (4) An authorizer shall develop, carry out, and maintain authorizing policies and practices consistent with nationally recognized principles and standards for authorizing in all major areas of authorizing responsibility, including:
  - (a) organizational capacity and infrastructure;
  - (b) soliciting and evaluating choice school proposals;
  - (c) performance contracting;
  - (d) ongoing community choice school oversight and evaluation; and
  - (e) charter contract renewal decision making.
- (5) Evidence of material or persistent failure to carry out the duties enumerated in this section constitutes grounds for rescission of authorizing powers by the commission.
- (6) Each authorizer shall submit to the commission an annual report summarizing:
  - (a) the authorizer's strategic vision for authorizing and progress toward achieving that vision;
  - (b) the academic and financial performance of all operating choice schools overseen by the authorizer, according to the performance expectations for choice schools set forth in this part;
  - (c) the status of the authorizer's choice school portfolio, identifying all choice schools approved but not yet open, operating, renewed, transferred, revoked, not renewed, voluntarily closed, or never opened;
  - (d) the authorizing functions provided by the authorizer to the choice schools under its direction, including the authorizer's operating costs and expenses detailed in annual audited financial statements that conform with generally accepted accounting principles; and
  - (e) the services purchased from the authorizer by a choice school under the authorizer's direction, including and itemized accounting of the actual costs of these services, as required in **20-11-109**.
- (7) An employee, trustee, agent, or representative of an authorizer may not simultaneously serve as an employee, trustee, agent, representative, vendor, or contractor of a community choice school authorized by that entity.
- (8) A government unit or other entity, other than those expressly granted authority under **20-11-107**, may not assume any authorizing function or duty in any form unless expressly allowed by law.

## Corrective Action Intervention Process

1. **Initial Meeting:** In the event a Community Choice School Authorizer begins to exhibit early warning signs of distress, the Commission Director and representative of the Local School Board Authorizer shall convene to collect additional data to determine the severity of the distress.
2. **Commission Deliberation:** Following the initial meeting, the Commission Director will present the early warning signs of distress, additional data collected, and a possible recommendation for Corrective Action Intervention to the Commission Authorizing Subcommittee for consideration. If Corrective Action Intervention is approved by the Subcommittee, then it will be presented to the Commission for a ruling by resolution.
3. **Written Notice:** If the Commission determines Corrective Action Intervention is necessary, the Director will detail the concern(s) and potential consequences in written notice to the Authorizer. Written notice will include the Commission's identification of tiered intervention determination according to the Tiered Interventions Protocol, expectations and timeline for remedy, and a copy of the Corrective Action Intervention Plan template.
4. **Corrective Action Intervention Plan Completion:** The Commission Director will meet with the Authorizer to review the expectations for completion of the Corrective Action Plan. The Director will draft a SMART goal (Specific, Measurable, Attainable, Relevant, and Timebound) detailing expectations for remedying the issue for refining in collaboration with the Authorizer. The Local School Board Authorizer will complete the rest of the Corrective Action Plan, submitting it to the Commission Director within 10 business days.
5. **Corrective Action Plan Review by Commission Director:** The Authorizing Subcommittee will review the completed Corrective Action Plan submitted by the Authorizer to determine sufficiency of the plan to achieve required outcomes within 5 business days of receipt. If the plan is determined inadequate, the Commission Director will provide written feedback detailing where more information is needed and the Authorizer will be provided an opportunity to revise and re-submit the plan. The Commission will not require or recommend



specific remedies, thereby providing autonomy to the Local School Board Authorizer. The Authorizer will have 3 business days from receipt of Director's feedback to submit a final Plan.

6. Corrective Action Plan Review by Commission Authorizing Committee: The Commission Director will provide a copy of the Corrective Action Plan to the Commission Authorizing Committee for final review.
7. Action Plan Implementation: The Local School Board Authorizer implements the plan monitored by the Commission Director.
8. Final Evaluation: Upon the completion date, the Authorizer presents their final results to the Commission Authorizing Subcommittee. The Authorizing Subcommittee will make a final recommendation to the Committee as to adequacy of the progress to determine whether or not the school moves out of Corrective Action Intervention or to a more severe level of Intervention or Revocation. If the recommendation is for Revocation, the Revocation Policy is initiated.



DATE

Dear Local School Board Community Choice School Authorizer,

This notice is to inform you that the Local School Board Community Choice School Authorizer’s performance has become a concern of the Commission. The Commission has considered your context with additional quantitative and qualitative data to determine Corrective Action Intervention is appropriate at this time. The Commission has determined Corrective Action Tiered Intervention as indicated by the box checked below.

- ☐ Level I: Notice of Concern
- ☐ Level II: Notice of Breach
- ☐ Level III: Notice of Probationary Status
- ☐ Level IV: Notice of Revocation Review

The following are specific concerns noted by the Commission requiring remediation:

| Indicator(s) of Distress | SMART Goal Expectation to Remedy Concern (draft) |
|--------------------------|--------------------------------------------------|
|                          |                                                  |
|                          |                                                  |
|                          |                                                  |

At this time, the Commission is requiring the following Interventions.

- ☐ Meeting with Authorizer
- ☐ Corrective Action Intervention Plan developed by the Authorizer and approved by the Commission

The Commission Director will proceed with scheduling a meeting with the Authorizer to discuss specifics of the Commission’s concerns, the Corrective Action Plan Process, [and completion of a Corrective Action Intervention Plan. Please find attached a copy of the Corrective Action Intervention Plan template. This template will be due to the Commission not later than [XX-XX-XXXX].]

Upon satisfactory remedy of the concern, your Authorizer status will be removed from Corrective Action. Please note, if the Commission’s expectations are not met, the Intervention may escalate to rescission of authorizing powers. A copy of the Commission’s Corrective Action Plan Intervention Process is attached.

Sincerely,

Commission Chair



## Authorizer Corrective Action Intervention Plan

|                           |  |
|---------------------------|--|
| Tiered Intervention Level |  |
|---------------------------|--|

| Local School Board Authorizer Information |  |       |  |
|-------------------------------------------|--|-------|--|
| LCB Name                                  |  | Date  |  |
| Primary Contact                           |  | Phone |  |
| Email                                     |  |       |  |

### Section I: Action Plan

| Completed by Commission |                       |                                                  |                                       |
|-------------------------|-----------------------|--------------------------------------------------|---------------------------------------|
| Indicator of Distress   |                       | SMART Goal Expectation to Remedy Concern (draft) |                                       |
|                         |                       |                                                  |                                       |
| Completed by Authorizer |                       |                                                  |                                       |
| Action Item             | Person(s) Responsible | Timeline                                         | Evidence of Success (upon completion) |
|                         |                       |                                                  |                                       |
|                         |                       |                                                  |                                       |
|                         |                       |                                                  |                                       |

## Section II: Timeline

(completed by Authorizer and Commission Director)

| Due Date | Action Items                                                                                                                           |
|----------|----------------------------------------------------------------------------------------------------------------------------------------|
|          | Initial Corrective Action Intervention Planning Meeting between Authorizer and Commission Director                                     |
|          | Corrective Action Intervention Plan due to Commission (10 business days from initial meeting)                                          |
|          | Commission Director Review of Corrective Action Intervention Plan (within 2 business days)                                             |
|          | If needed, Authorizer Revisions to Corrective Action Implementation Plan (within 5 business days of feedback from Commission Director) |
|          | Implementation of Corrective Action Intervention Plan Begins                                                                           |
|          | Progress Monitoring Check-in with Commission Director                                                                                  |
|          | Presentation of Completed Action Plan to Commission for Final Determination                                                            |

## Section III: Authorizer's Self-Reflection and Plans to Ensure Future Compliance

(upon completion of plan)

## Section IV: Commission's Final Determination

| Tiered Intervention Level |                                          | Next Steps |
|---------------------------|------------------------------------------|------------|
|                           | No Intervention, All Conditions Remedied |            |
|                           | Level I: Notice of Concern               |            |
|                           | Level II: Notice of Breach               |            |
|                           | Level III: Probationary Status           |            |
|                           | Level IV: Notice of Revocation Review    |            |
|                           | Level V: Notice of Revocation            |            |



## Rescission of Authorizing Powers Process

### Conditions for Rescission

In the instance an Authorizer has moved into Corrective Action Intervention and failed to make the progress needed, and/or violated any provisions of the Community Choice Schools Act 20-11-108; Authorizer Contract rescission is in order. Every effort will be made to provide the local School District Authorizer as much notice as possible prior to the closure.

#### Community Choice Schools Act

20-11-108(5) Evidence of material or persistent failure to carry out the duties enumerated in this section constitutes grounds for rescission of authorizing powers by the commission.

### Rescission Process

1. Commission Action: The Commission shall review evidence of Authorizer contract non-compliance and consider how to take action.
2. Rescission Hearing: The Commission will provide the Authorizer contract holders an opportunity to submit documents and testimony at a hearing to challenge the rationale for the rescission recommendation and in support of the continuation as an Authorizer. The Authorizer may be represented by counsel and call witnesses on their behalf. Recording of the proceedings is permitted as are all open meeting laws. The Director and Local School District Authorizer will arrange the date of the hearing within 5 business days of the Commission's decision to open a hearing.
3. Final Determination: The commission shall rule by resolution and take action as the final step in the hearing. The hearing will abide by Montana's (MCA) open meeting laws.





## Notice of Authorizer Rescission

| Authorizer Information         |  |       |  |
|--------------------------------|--|-------|--|
| Local School Board Name        |  | LEA # |  |
| LSB Address                    |  |       |  |
| LSB Contact Name, Phone, Email |  |       |  |
| Date of Hearing                |  |       |  |

### Section I: Reason for Rescission with Evidence of Non-Compliance

### Section II: Meeting Notes Containing Commission's Rescission Resolution



## Petition to Transfer Authorizers

### Policy

20-11-118(6) Transfer of a charter contract, and of oversight of that choice school from one authorizer to another before the expiration of the charter contract term, may occur only if the authorizer violates the provisions of **20-11-108** or by special petition to the commission by a choice school or its authorizer. The commission shall consider a petition for transfer on a case-by-case basis and may grant transfer requests in response to special circumstances and to evidence that the transfer would serve the best interests of the community choice school's students.

### Commission's Criteria for Granting a Transfer

The Commission will consider the request to transfer in the context of its Guiding Principles to determine whether clear evidence exists that students would be better served under the proposed authorizer.

1. **Students First, Always:** Student success is our north star. We want every student to experience the transformative power of education.
2. **Stewards of the Public Trust:** We exercise our authority with transparency, discipline, and humility. Credibility is foundational and we understand that trust must be earned, not assumed. We seek to build enduring trust with families, educators, communities, tribes, and policymakers through every decision we make.
3. **Authorizing for Systems Change:** We don't just authorize schools, we help foster a more responsive, innovative, and effective public education system.
4. **Excellence is the Expectation:** Students deserve our best. That's why we set a high bar for schools, boards, authorizers, and ourselves.
5. **Community-Centered Innovation:** We listen to and elevate local voices and context, especially in rural and tribal communities, in order to create the conditions where excellence can thrive.
6. **Clarity and Courage in Decision-Making:** We lead transparently and act with integrity. We face difficult decisions with moral clarity and constitutional conviction.

### Procedures for Transferring the Contract upon Approval

Upon the Commission's approval to transfer authorizers, the Choice School's governing board chair and the former authorizing body chair shall terminate the Choice School's existing contract. The Choice Schools governing board chair and the new authorizing body chair shall execute a contract under the new authorizer adhering to the contract term in the Choice School's original contract and including the Local Education Agency number as originally assigned in order to ensure no disturbance to funding. The Choice School will then be held to all contractual requirements under the new authorizer's contract including the authorizer's Performance Framework.

Request for Transfer of Authorizer

Directions: Complete Sections I-IV and attach the following documents:

- 1. Most recent Annual Report
- 2. Most recent Audit of Financials
- 3. Proposed Budget for Next School Year
- 4. Board Meeting Minutes
  - a. Including resolution to initiate transfer of Authorizer, and
  - b. All minutes from the past 6 months

| Section I: School Overview                        |  |
|---------------------------------------------------|--|
| Date                                              |  |
| School Name                                       |  |
| Address                                           |  |
| Mission                                           |  |
| School Leader                                     |  |
| Governing Board Chair                             |  |
| Year of Charter Contract                          |  |
| Authorizer to Which School<br>Intends to Transfer |  |

## Section II: Circumstances Initiating Request to Transfer Authorizer

## Section III: Provide Evidence of Benefit to Students

## Section IV: Signature

|                                    |  |
|------------------------------------|--|
| Signature of Governing Board Chair |  |
| Date                               |  |

## Section V: Commission's Determination

Approved

Rational

Denied

Rationale



## Approved Authorizers Registration Log

|                               |  |       |  |                |  |
|-------------------------------|--|-------|--|----------------|--|
| Local School District Name    |  | LEA # |  | District Level |  |
| Address                       |  |       |  |                |  |
| Authorizer Main Contact Name  |  |       |  |                |  |
| Authorizer Main Contact Phone |  |       |  |                |  |
| Authorizer Main Contact Email |  |       |  |                |  |
| Contract Term                 |  |       |  |                |  |
| CCS Authorizing               |  |       |  |                |  |

|                               |  |       |  |                |  |
|-------------------------------|--|-------|--|----------------|--|
| Local School District Name    |  | LEA # |  | District Level |  |
| Address                       |  |       |  |                |  |
| Authorizer Main Contact Name  |  |       |  |                |  |
| Authorizer Main Contact Phone |  |       |  |                |  |
| Authorizer Main Contact Email |  |       |  |                |  |
| Contract Term                 |  |       |  |                |  |
| CCS Authorizing               |  |       |  |                |  |



**ITEM 19**

**ACTION AND INFORMATION ON PUBLIC  
CHARTER SCHOOL AMENDMENT  
REQUEST PROCESS**

**McCall Flynn**



## Montana Board of Public Education Public Charter School Amendment Request

### Purpose

This form is used to request approval from the Montana Board of Public Education for amendments to an approved public charter school application or charter contract pursuant to 20-6-809, MCA.

### 1. School Information

Public Charter School Name: Click or tap here to enter text.

District: Click or tap here to enter text.

Primary Contact: Click or tap here to enter text.

Date of Request: Click or tap here to enter text.

### 2. Amendment Summary

Type of Amendment: Choose an item.

Description of Proposed Change: Click or tap here to enter text.

### 3. Rationale

Reason for Amendment: Click or tap here to enter text.

What has changed since your Public Charter School application was approved? Click or tap here to enter text.

### 4. Impact on Performance Framework

Does this change how the school is evaluated? ☐ Yes ☐ No

Affected Areas: Click or tap here to enter text.

Description of Changes: Click or tap here to enter text.

Updated Measures: Click or tap here to enter text.

### 5. Enrollment and Financial Impact

Current Enrollment:

| K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | Total |
|---|---|---|---|---|---|---|---|---|---|----|----|----|-------|
|   |   |   |   |   |   |   |   |   |   |    |    |    |       |

Revised Enrollment (if applicable):

| K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | Total |
|---|---|---|---|---|---|---|---|---|---|----|----|----|-------|
|   |   |   |   |   |   |   |   |   |   |    |    |    |       |

Please explain how this will impact your ANB: Click or tap here to enter text.

**Additional Operational Impacts:** Check all that apply:

- ☐ Staffing changes
- ☐ Budget revision required
- ☐ Student transportation changes
- ☐ Facility changes
- ☐ Other (describe below)  
Click or tap here to enter text.
- ☐ No additional operational impacts

**Describe the operational impacts of the proposed amendment, including any anticipated effects on staffing, budget, transportation, facilities, or other school operations.** Click or tap here to enter text.

**6. Alignment to Charter Contract**

Does this change the mission, model, or scope? ☐ Yes ☐ No  
Explanation: Click or tap here to enter text.

**7. Implementation**

Proposed Effective Date: Click or tap here to enter text.  
Implementation Timeline: Click or tap here to enter text.

**8. Communication Plan**

Describe how the school will communicate the proposed amendment and, if approved, its implementation to affected students, families, staff, the district, and other stakeholders, as applicable.  
Click or tap here to enter text.

**9. Charter Governing Board Approval**

Date Approved: Click or tap here to enter text.  
Board Minutes Attached: ☐ Yes ☐ No

**10. Other**

If the proposed amendment does not fall within the categories listed above, please describe the requested change in detail below. This may include, but is not limited to, changes such as the Public Charter School's name or other charter amendments not otherwise specified.  
Description of Request: Click or tap here to enter text.

**Signatures**

---

|                               |      |
|-------------------------------|------|
| Charter Governing Board Chair | Date |
|-------------------------------|------|

---

|                                 |      |
|---------------------------------|------|
| Board of Public Education Chair | Date |
|---------------------------------|------|

Board of Public Education Determination: ☐ Approved ☐ Denied

❖ **EXECUTIVE COMMITTEE – (Items 20-22)**

**Dr. Tim Tharp**

**ITEM 20**

**PRESENTATION ON MONTANA BRIDGED  
HEALTH ALLIANCE**

**John Doran**



## A New Era of Health Care By Schools, For Schools

# A NEW ERA IN HEALTH CARE

Bridged Health Alliance (Bridged) is the newly established health and wellness benefits trust formed because of Montana House Bill (HB) 332 (Bedey, 2023). HB332 is the culmination of decades of effort by the Montana public education community to pass a bill and create an incentive for school districts of all sizes to pool together to lower health insurance premiums and stabilize costs.

Bridged is forming for **public schools and public schools only**. Every dollar saved on health care costs through Bridged is a dollar that stays in education — funding classrooms, supporting staff and strengthening the communities we serve. Strong schools build strong communities, and strong communities shape Montana's future.

From the beginning, this conversation was never simply about one renewal cycle or one pricing exercise. It was about whether public schools could come together and build something **structurally different**, something designed around long-term sustainability, transparency, and stewardship of school resources.

The current health care system was not becoming more predictable, more transparent, or more sustainable for schools. Costs continued to rise, reserves remained under pressure, and schools were left reacting year after year to a system they did not control.

Bridged represents an opportunity to change that trajectory.

Bridged has now successfully validated and moved from concept to an operational reality. We have secured Medicare-based provider reimbursement structures at hospitals across Montana, created a statewide school-focused model, lowered administrative costs through collective scale, and built a structure specifically designed to help schools better manage one of the largest financial pressures they face.

Health care costs will continue to place increasing pressure on school budgets for years to come. The districts that place themselves in the strongest long-term position will be those willing to address the structural drivers behind those costs, not simply negotiate around the edges year to year.

A Medicare-based reimbursement structure changes the playing field because it creates a more stable and predictable foundation for claims costs moving forward. That is not just meaningful today. It becomes more meaningful every single year thereafter.

# THE VALUE OF BRIDGED

Bridged is the vehicle for Montana public schools to access the \$40 million incentive payment and use our collective bargaining power to drive down the cost of health care in a way that no school district can achieve on its own. Bridged's focus has consistently centered on delivering long-term structural value and sustainable financial stewardship for Montana public schools. From the beginning, Bridged has remained committed to building a model designed to do what is right not only for each individual school district, but for Montana public schools collectively over time.

Taken together, Bridged reflects a comprehensive long-term strategy focused on:

- Lower and more predictable fixed costs through reduced administrative and reinsurance expenses
- Greater pharmacy guarantees through a more transparent pass-through model
- Improved control over health care claims costs, particularly hospital reimbursement tied to Medicare-based pricing methodologies rather than chargemaster pricing
- A recurring annual cost reduction representing meaningful and sustainable financial improvement to strengthen reserves, stabilize operations, mitigate financial risk and create opportunities for strategic investment
- The best opportunity for schools to drive down the cost employees pay for health insurance
- Broad access to medical and pharmacy network means minimal disruption in pharmacy network for employees

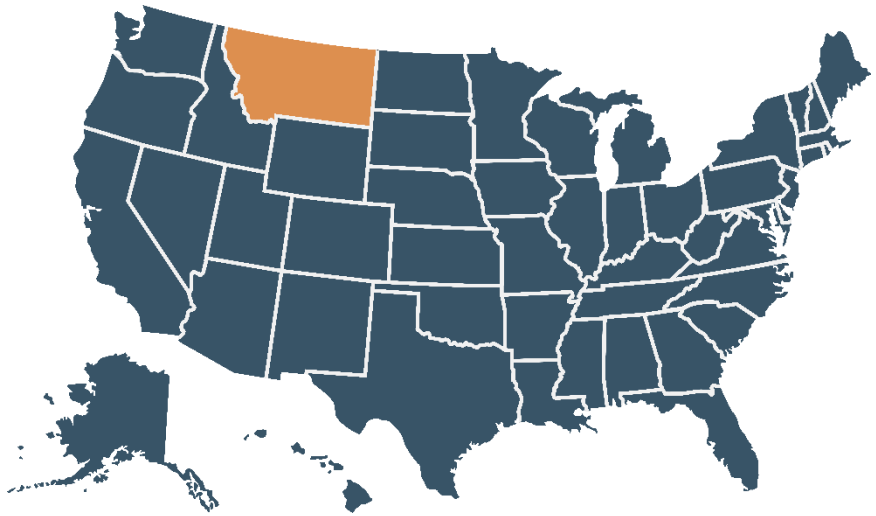


## NETWORK

### STATEWIDE AND NATIONWIDE ACCESS

Bridged is pleased to offer a **directly contracted provider network** designed specifically for Montana's public schools. This network is unique in the state and includes:

- ✓ **100% of Montana hospitals**
- ✓ **Approximately 97% of Montana physicians**
- ✓ Nationwide access through **Cigna's national PPO network** for services obtained outside Montana



### CONTROLLING CLAIMS COSTS TO STABILIZE RESERVES

A foundational component of the Bridged network is its **Medicare-based reimbursement structure**. Aligning reimbursement to Medicare-based methodologies helps reduce long-term medical costs and lessens exposure to volatility associated with hospital chargemaster pricing.



While most insurer health care trends hover between 8 to 15 percent increases year over year, Medicare unit costs increase by at most 3 percent annually. Why does that matter? Bridged is resetting the baseline for the biggest driver of health care costs and setting course on a much lower, more predictable trajectory for the future. This adds up to substantial savings over time.

This is the game-changer opportunity that Bridged affords Montana public schools. This fundamental change in the way we pay for health care is only possible by schools coming together in solidarity to allow Bridged the size, scale and bargaining power that schools alone cannot.

---

## HOSPITAL PRICING CONSISTENCY



In addition, Bridged has established Medicare-based reimbursement structures at hospitals throughout Montana, creating a level of statewide pricing consistency that is uncommon in the broader marketplace. As a result, when employees or their loved ones receive care outside their hometown, they continue to benefit from the same underlying reimbursement philosophy and long-term cost management approach across the state.

This statewide alignment is an important component of the overall strategy and helps extend the value of the Bridged model beyond any single local market.

## STOP-LOSS STRATEGY

---

### RISK MITIGATION

Bridged includes fixed-cost risk protection that remains lower than **school districts' current costs**. This is driven largely by Bridged's structure as a **publicly funded, nonprofit trust created by schools for schools**. This is a critically important aspect to mitigating future risk. Health care costs continue to place increasing pressure on school budgets and employee pocketbooks.



Unlike traditional reinsurance models that often require significant margin retention with target loss ratios of around 70%, Bridged's structure with a targeted 90% loss ratio is designed to return greater value directly to participating districts through lower premiums and improved long-term claims management.

This allows more premium dollars to remain within the school system rather than being retained as insurer margin, while also creating a more sustainable and proactive approach to managing catastrophic risk that benefits all participating schools and their employees.

---

## REINVESTING RESERVES IN SCHOOLS



As a true nonprofit trust, it is important to maintain a healthy reserve to keep costs down for schools. But that doesn't mean unnecessarily amassing reserves above a certain threshold. That's why Bridged has capped its reserves at a level recommended by its actuary and the State's actuary. Any excess reserves above the necessary threshold are returned to schools in the form of cost stabilization: driving down potential increase in premiums, investing in wellness programs, the possibilities are endless. This is yet another way that Bridged works on schools' behalf.

## ADMINISTRATIVE COSTS

---

### COLLECTIVE POWER = GREATER SAVINGS



The size and scale of Bridged provides significant bargaining power. By bringing together more than 200 school districts, Bridged offers cost efficiency, and our collective structure provides stability and consistency that individual districts often cannot achieve on their own. By pooling resources and risk across multiple member schools, the trust reduces volatility and creates more predictable budgeting conditions, allowing district leaders to plan with greater confidence.

## ROBUST ACCESS TO MEDICAL, PHARMACY, MENTAL HEALTH CARE

---

### BROAD ACCESS = HEALTH CARE ANYWHERE



Selecting the right partners was crucial for Bridged to ensure lower costs while not compromising access to care. Allegiance Benefit Plan Management, of Missoula, is Third Party Administrator, ensuring reliable access to medical care through its expansive in- and out-of-state provider networks. Enhanced pharmacy benefits through Capital Rx increase value with broad access and transparent pricing, creating a smooth transition for members. Our telemedicine partner, First Stop Health, provides direct

access to urgent, primary, and mental health care – with a \$0 copay for all telemedicine services.

## BUDGET IMPACT

### STRUCTURAL BUDGET STABILITY = MORE MONEY FOR CLASSROOMS

School districts across Montana are entering a period of **heightened fiscal pressure** as districts transition off temporary federal COVID-relief funding. While these resources provided short-term stability and enabled program expansion, their expiration creates a **structural funding gap** that must now be addressed through ongoing revenues, cost alignment, and strategic decisions.



The COVID-relief funding cliff is fundamentally a **cost structure problem**, not just a revenue problem. One of the most significant and growing cost drivers for districts is **employee health insurance**.

The immediate and recurring cost reduction afforded by Bridged create structural budget stability, helps preserve core programs and academic offerings, and strengthens the district's financial position so you can maintain a proactive approach to long-term sustainability rather than be reactionary.

## DRIVING DOWN THE COST EMPLOYEES PAY

### RETURNING VALUE TO EMPLOYEES



Bridged's ultimate goal is to reduce the amount school districts pay for health care so schools can reduce the amount employees pay for health insurance. It's that simple. Our nonprofit, schools-first model is designed to put more money back in employees' pockets where it belongs.

In short, we are doing this for **you**. Every dollar saved on health care costs through Bridged Health Alliance is a dollar that stays in education — funding classrooms, supporting staff and strengthening the communities we serve.

**ITEM 21**

**INFORMATION ON THE YOUTH RISK  
BEHAVIOR SURVEY RESULTS**

**Sarah Music  
Genie Zeeck**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                |
|------------------------------|------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | 2025 Youth Risk Behavior Survey Results                                                        |
| <b>Presenter</b>             | Sarah Music and Genie Zeeck                                                                    |
| <b>Position Title</b>        | Coordinated School Health Director and YRBS Program Specialist<br>Office of Public Instruction |
| <b>Overview</b>              | The purpose is to provide an overview of the results from the 2025 Montana YRBS survey.        |
| <b>Requested Decision(s)</b> | Information Only                                                                               |
| <b>Related Issue(s)</b>      |                                                                                                |
| <b>Recommendation(s)</b>     | N/A                                                                                            |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)



# 2025 Montana Youth Risk Behavior Survey *Montana Office of Public Instruction*

---

RESULTS AND TRENDS FROM THE 2025 YRBS

BOARD OF PUBLIC EDUCATION MEETING ~  
JULY 2026



# The Youth Risk Behavior Survey (*YRBS*)

Conducted by the Office of Public Instruction (OPI) through a cooperative agreement with the U.S. Centers for Disease Control and Prevention (CDC) since 1991

Administered starting the last week of January to the last week of April in odd-numbered years

Measures **six topics** that can result in morbidity and mortality:

- Unintentional Injuries and Violence
- Tobacco Use
- Alcohol and Other Drug Use
- Sexual Behaviors
- Nutrition and Dietary Behaviors
- Physical Inactivity



Today's  
presentation of  
data:

---

# 2025 Montana YRBS Results

---



---

## Gender

---

---

## Grade level

---

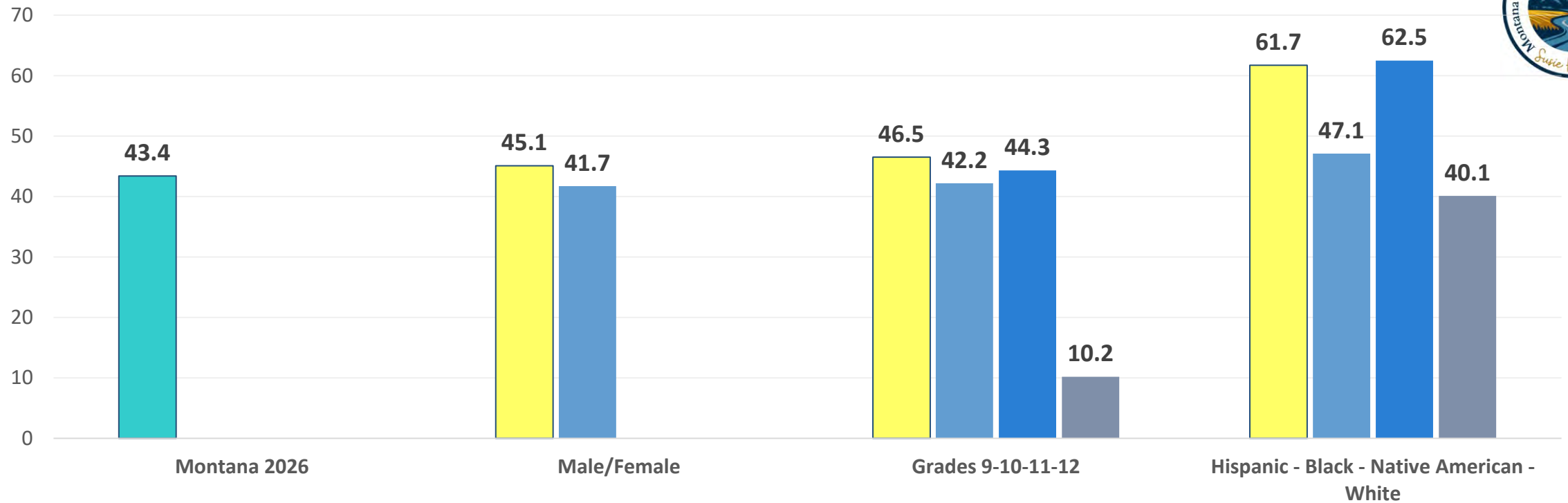
---

## Race/ethnicity

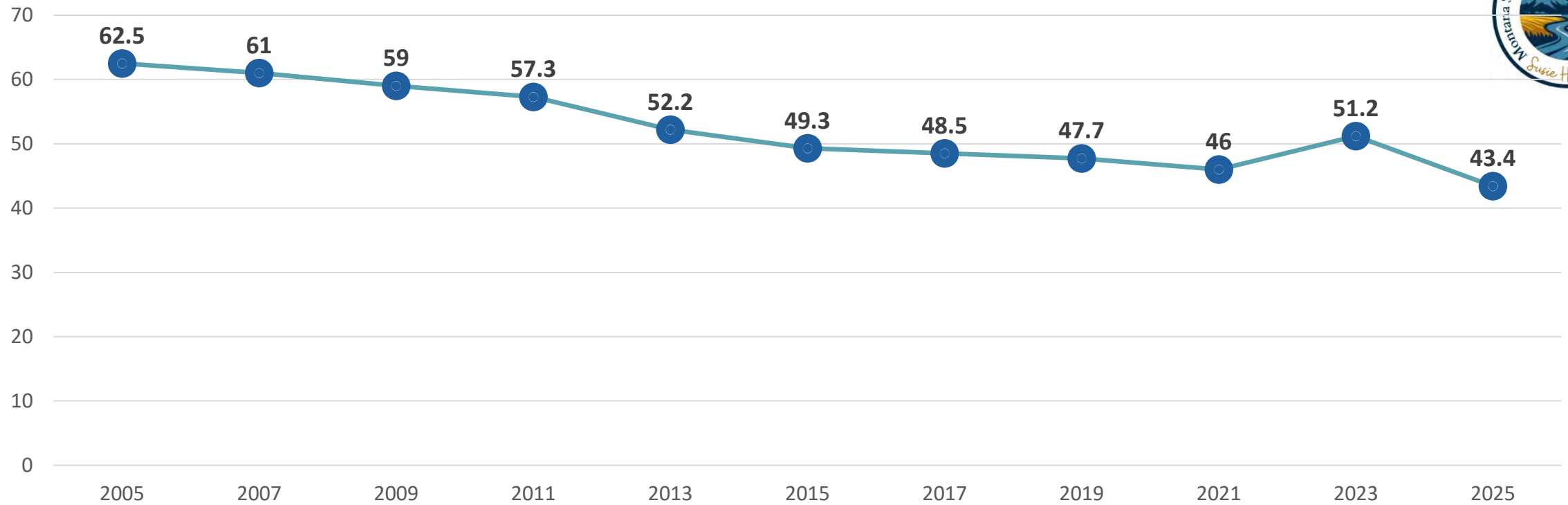
---

---

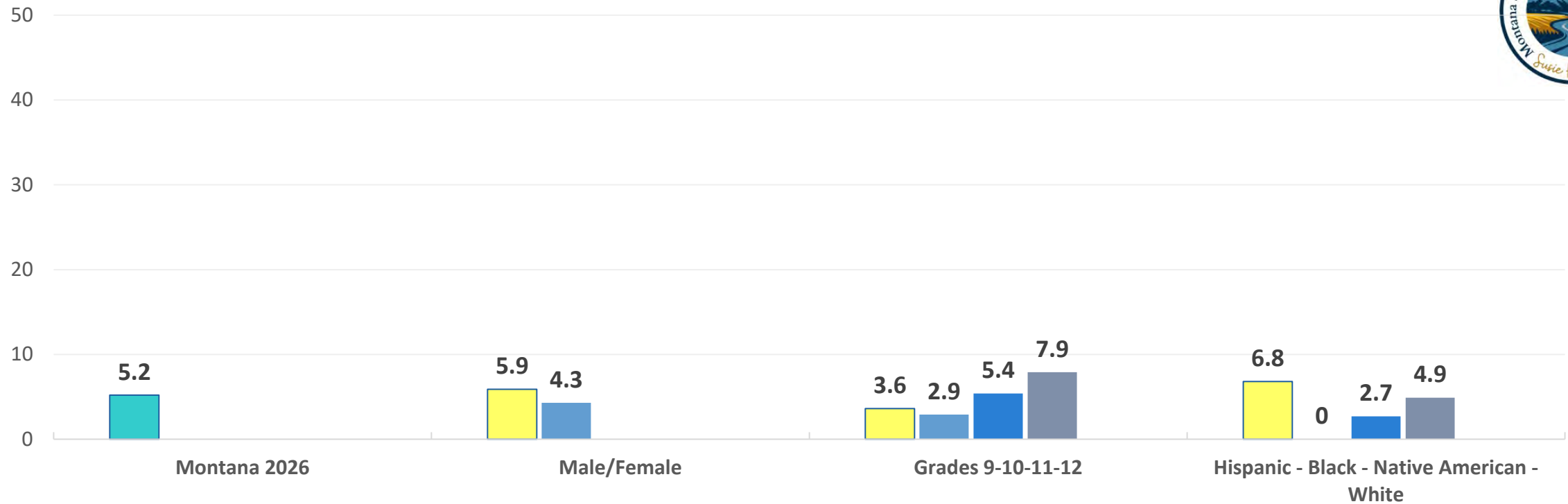
## Trend data from the last 10 years



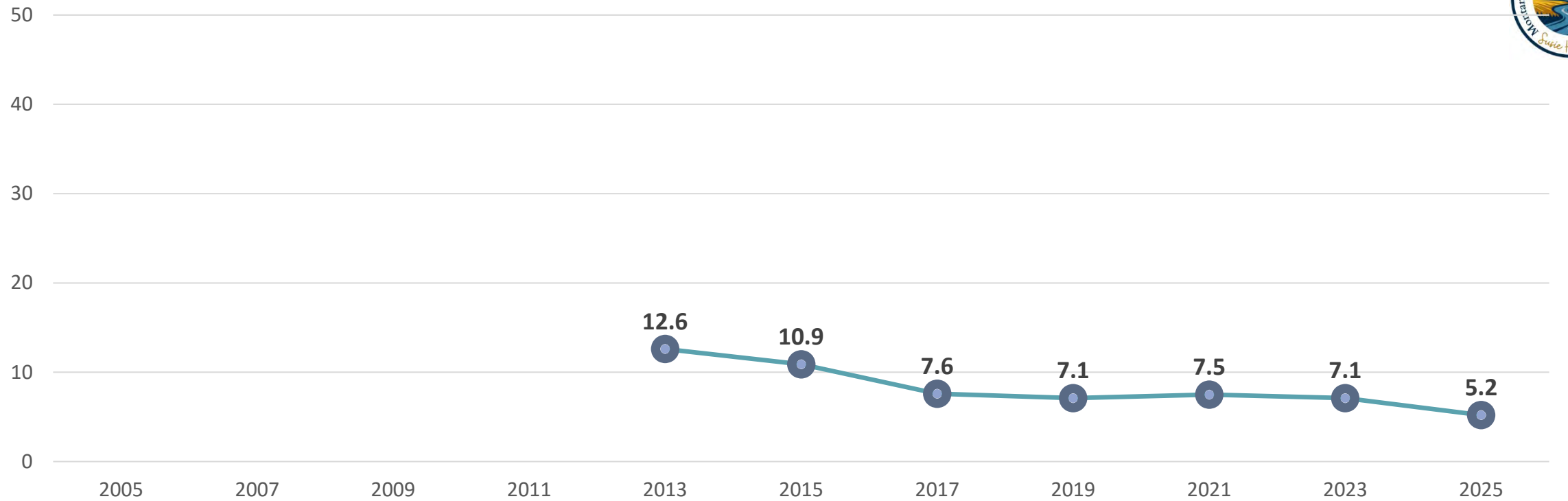
Never or rarely wore a seat belt when riding in a car



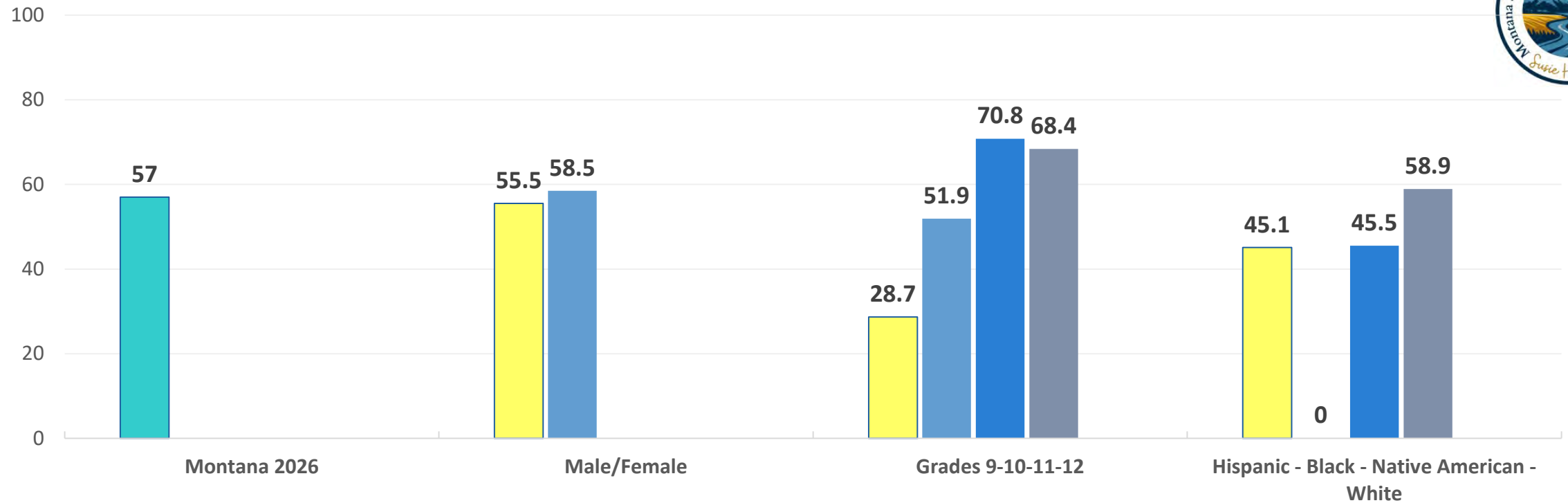
Never or rarely wore a seat belt when riding in a car



Drove while drinking, past 30 days

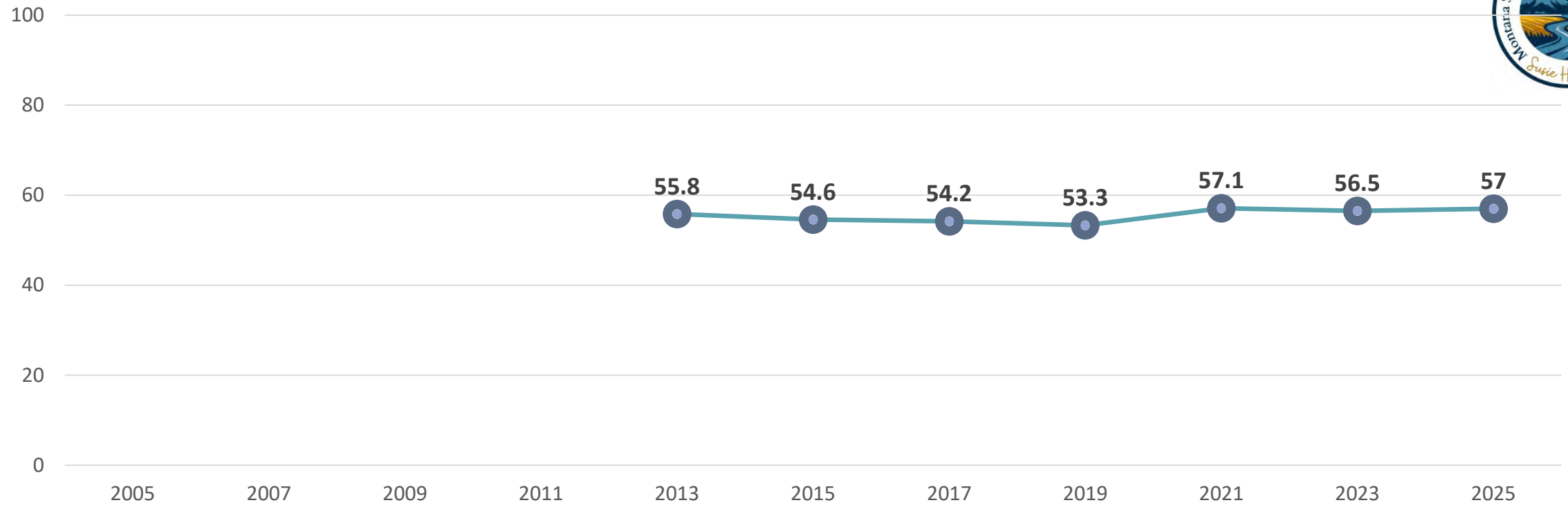


Drove while drinking, past 30 days

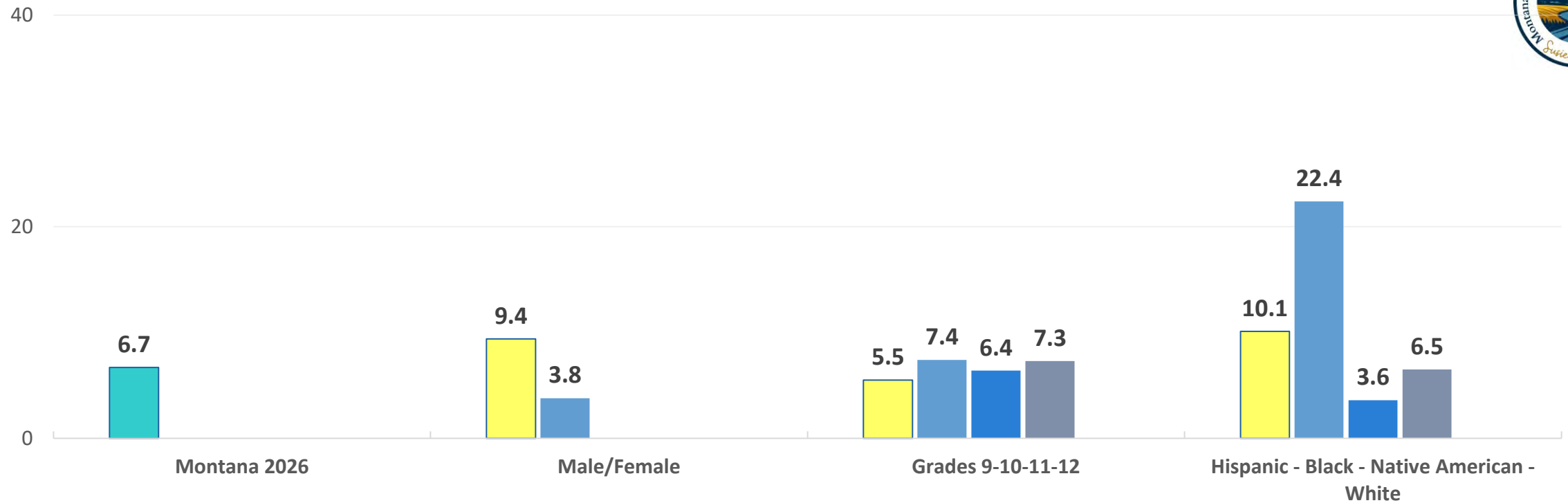


Texted or e-mailed while driving, past 30 days

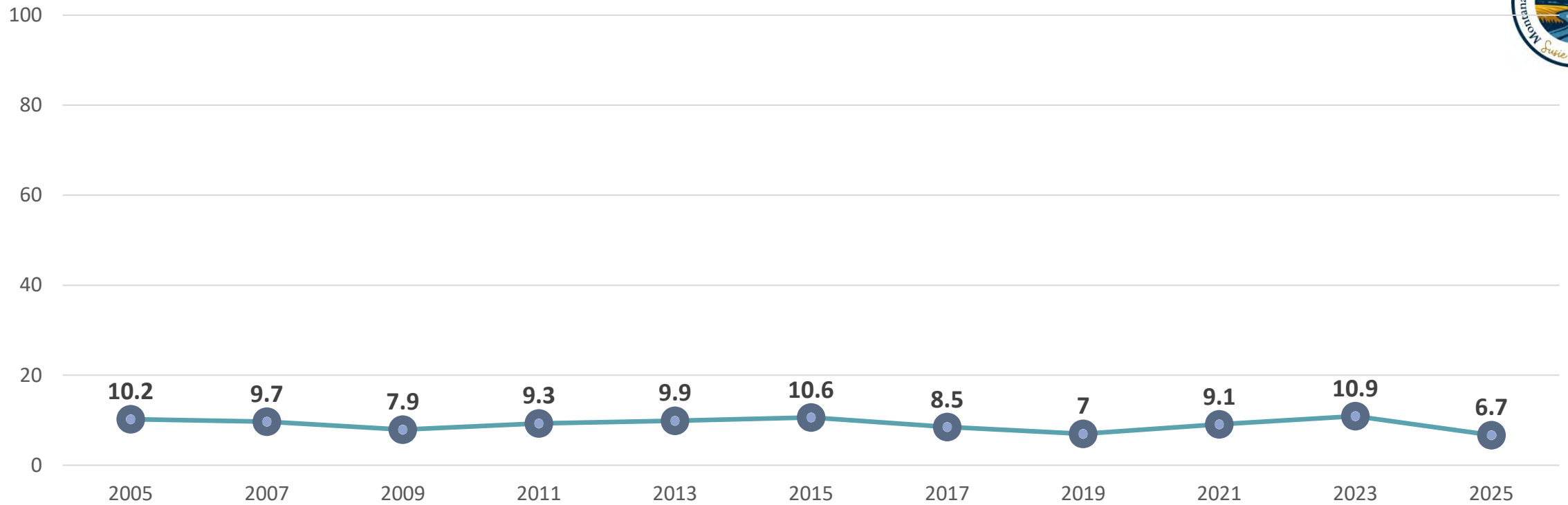




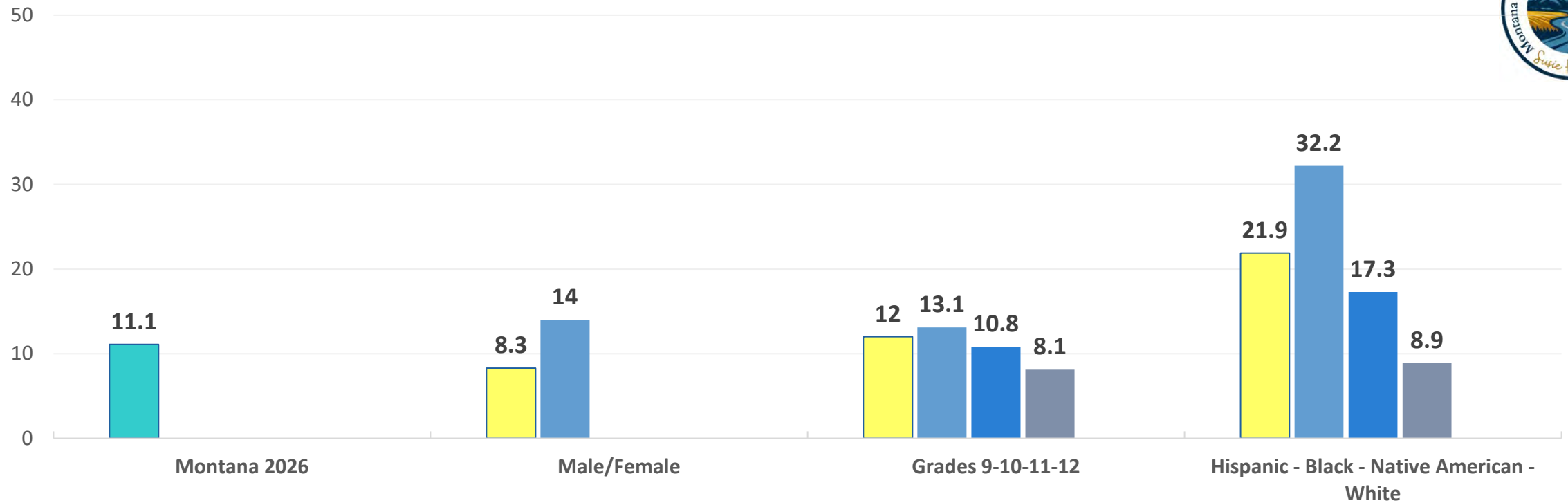
Texted or e-mailed while driving, past 30 days



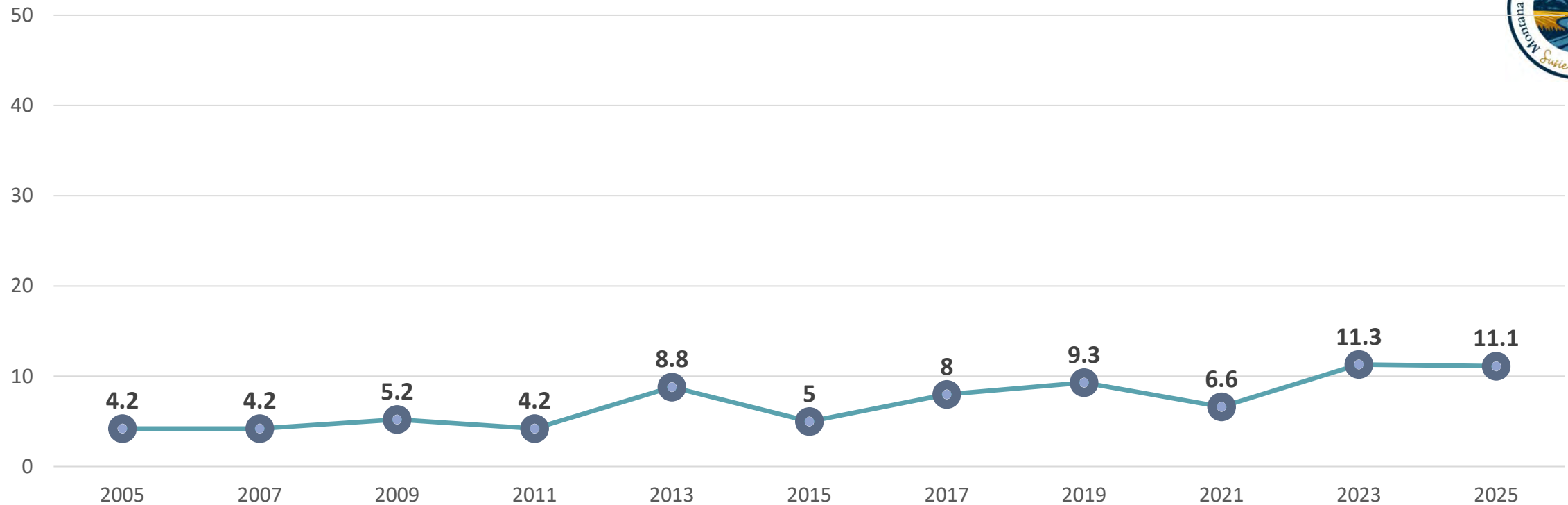
Carried a weapon on school property, past 30 days



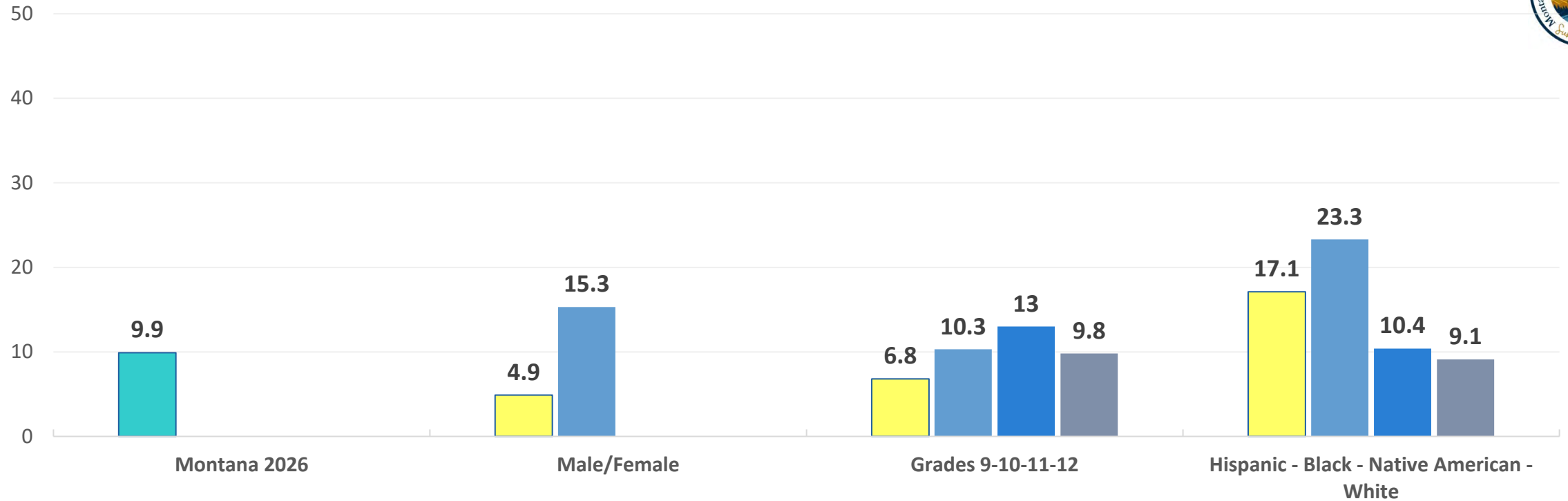
Carried a weapon on school property, past 30 days



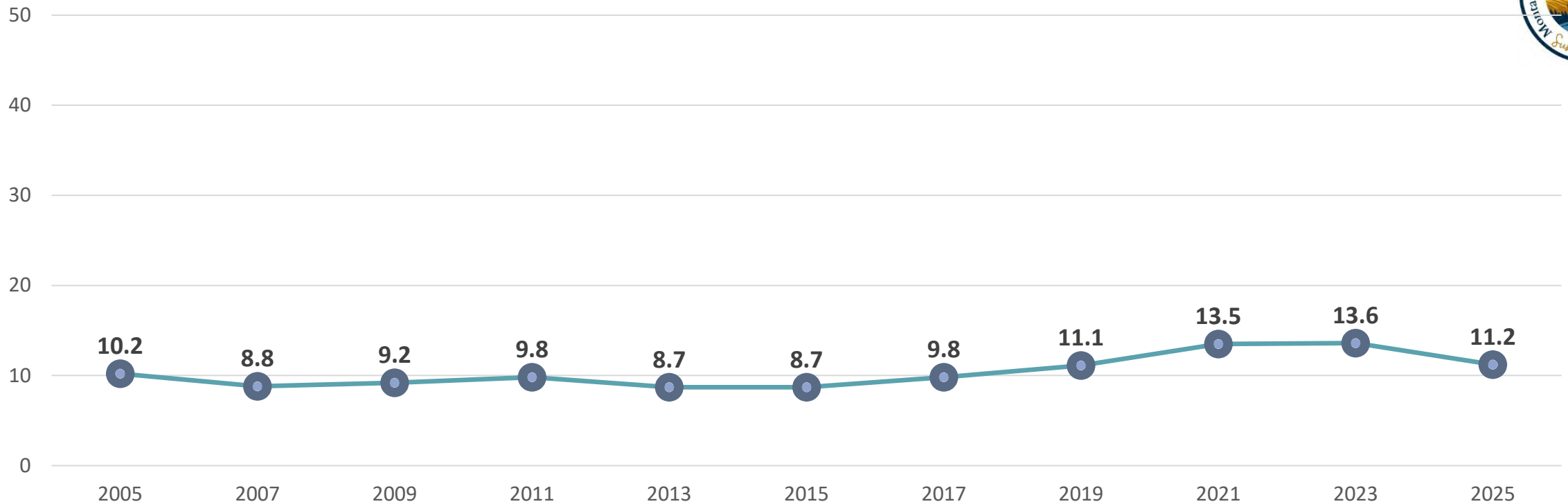
Did not go to school on one or more days because they felt unsafe at school or on their way to or from school, past 30 days



Did not go to school on one or more days because they felt unsafe at school or on their way to or from school, past 30 days

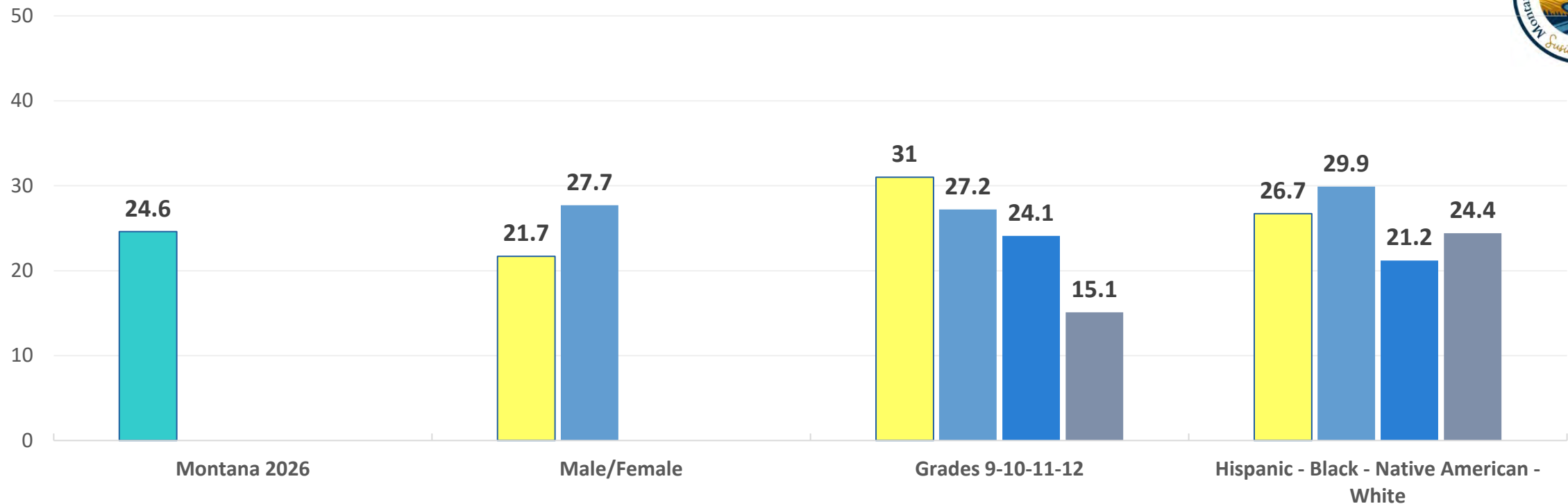


Had been forced to do sexual things such as kissing, touching, or being physically forced to have sexual intercourse when they did not want to, past 12 months

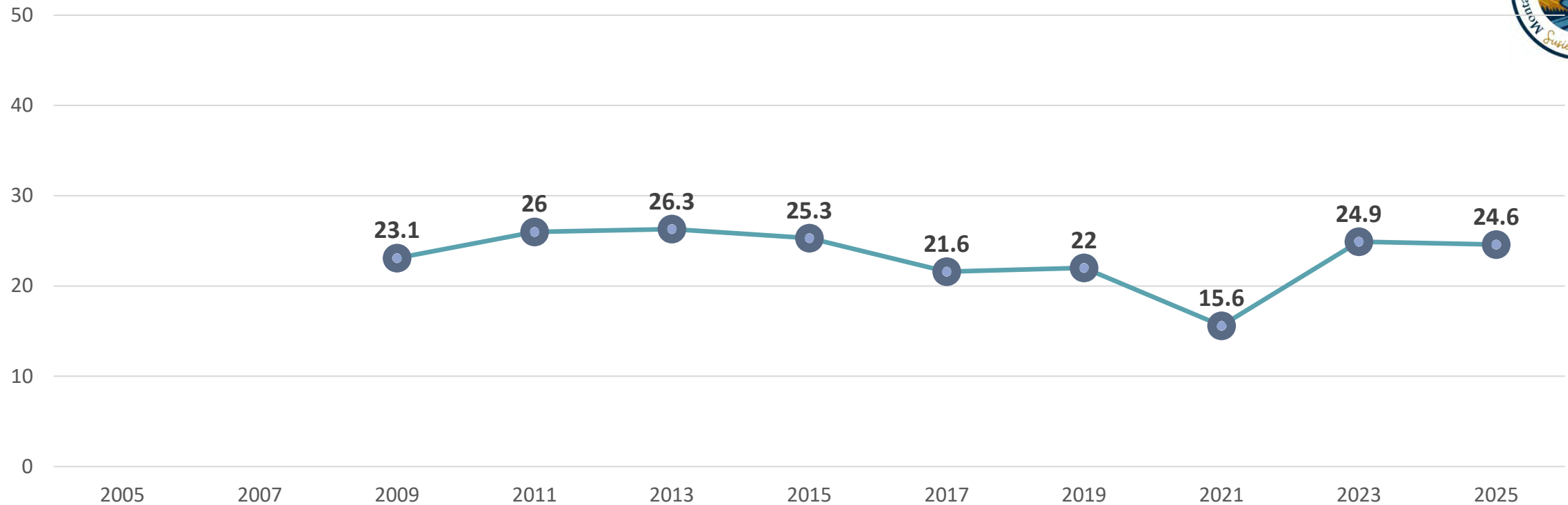


Had been forced to do sexual things such as kissing, touching, or being physically forced to have sexual intercourse when they did not want to, past 12 months

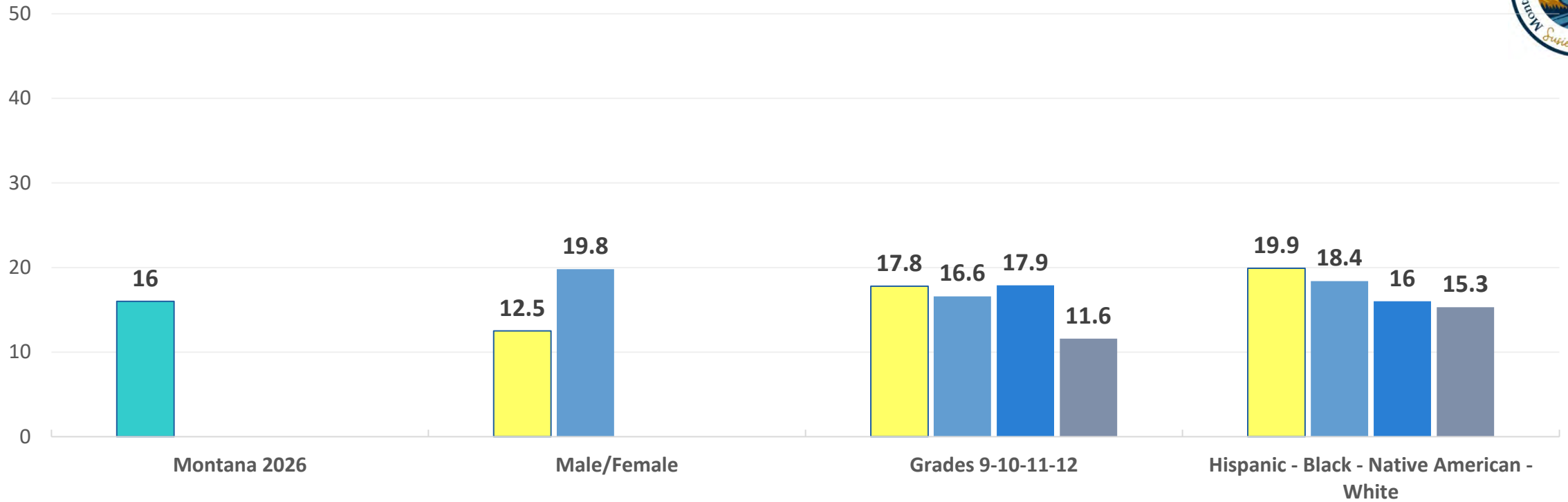




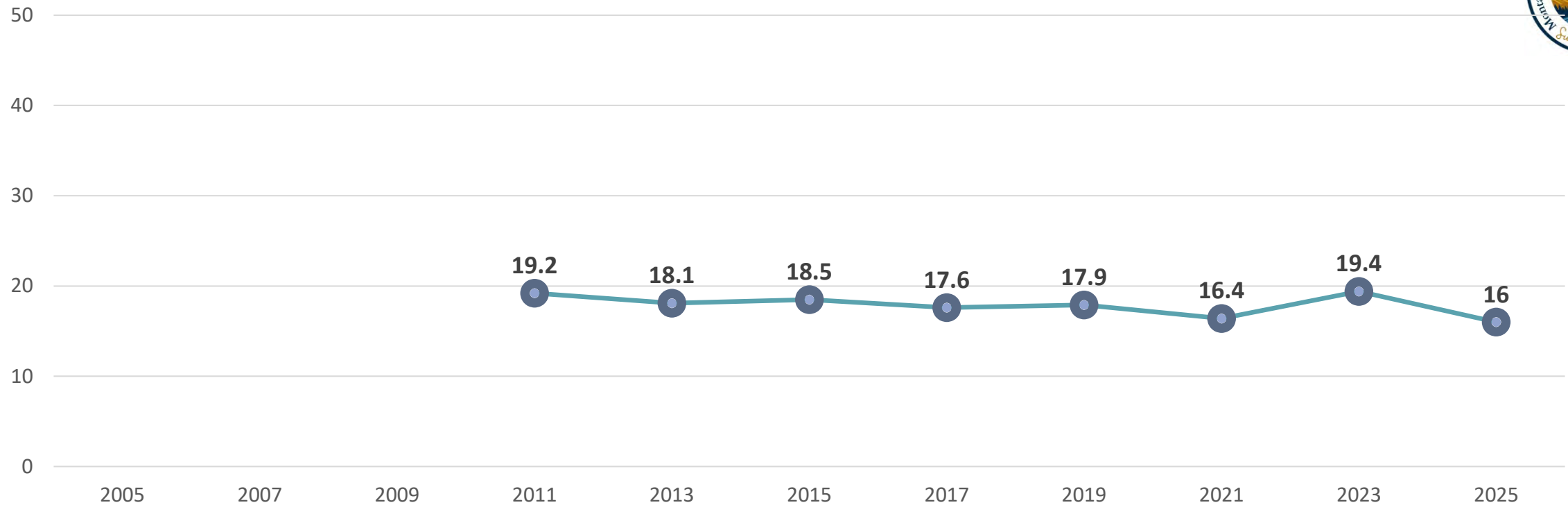
Were bullied on school property, past 12 months



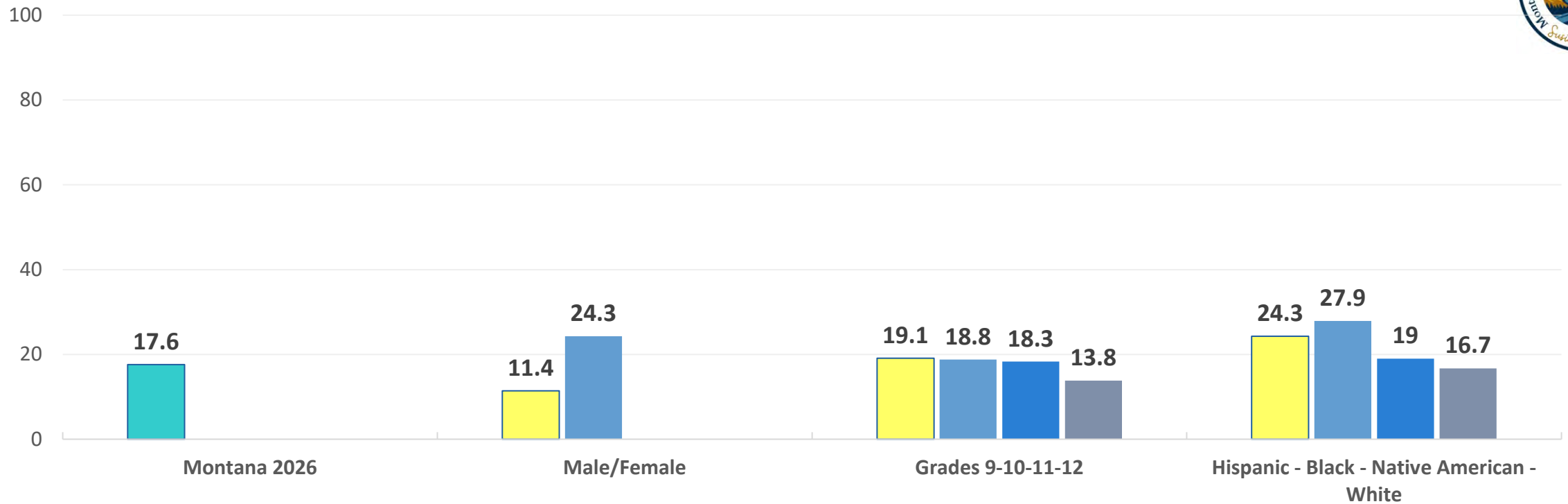
Were bullied on school property, past 12 months



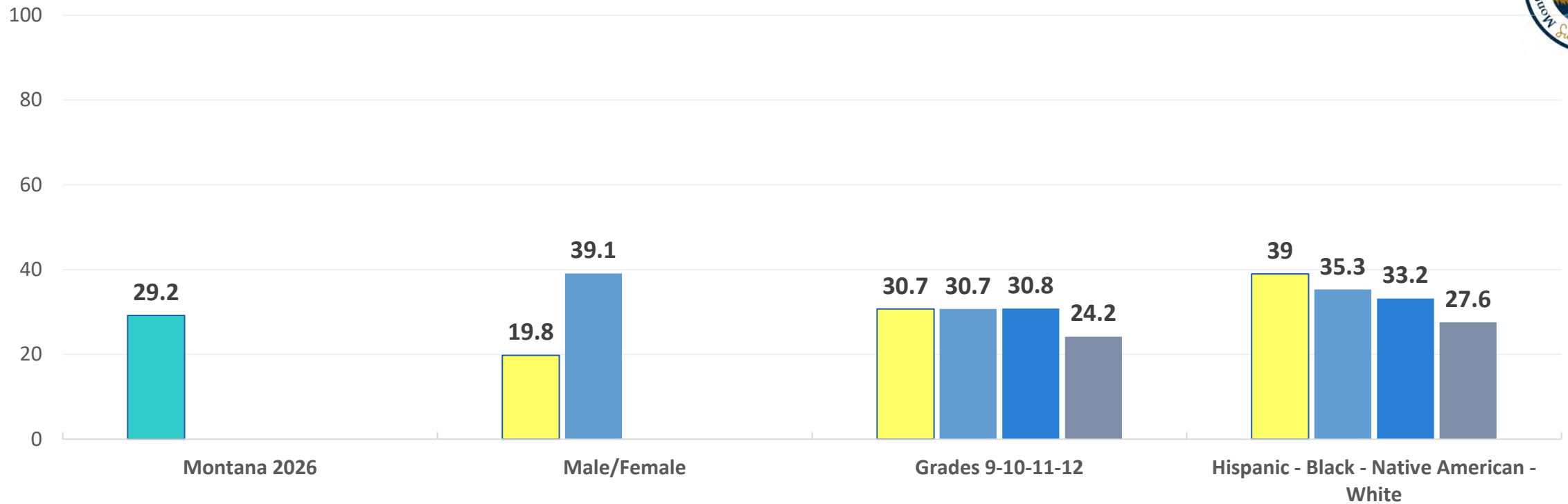
Had been electronically bullied, past 12 months



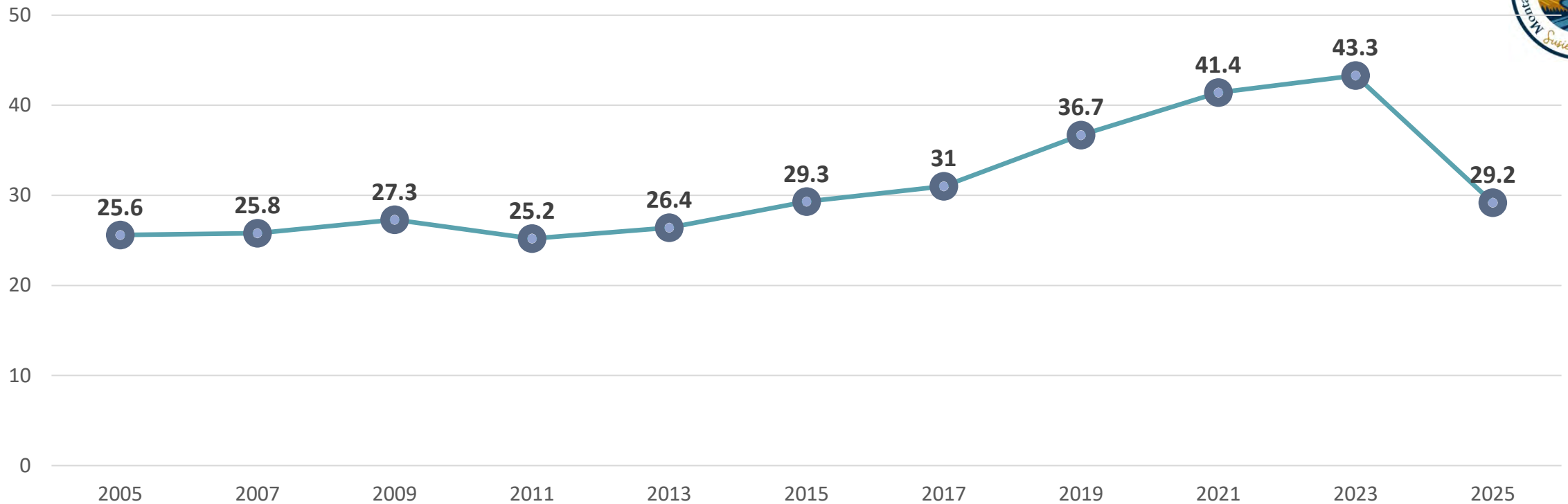
Had been electronically bullied, past 12 months



Did something to purposely hurt themselves without wanting to die, past 12 months

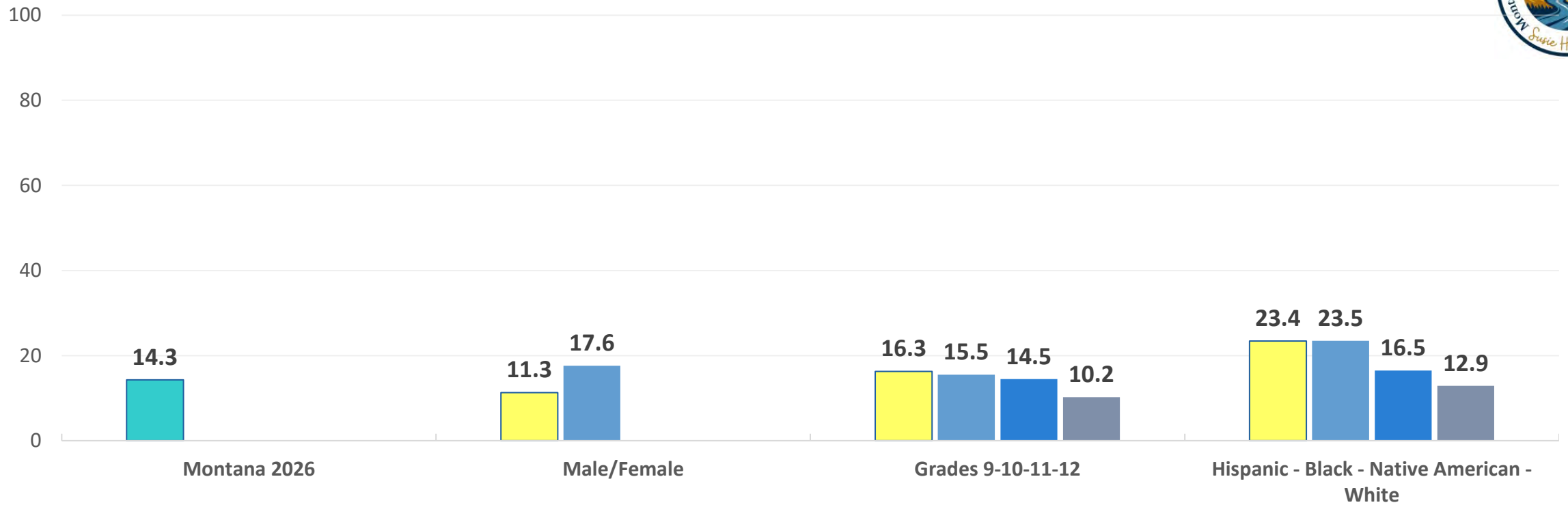


Felt so sad or hopeless for 2 weeks or more in a row that they stopped doing usual activities, past 12 months

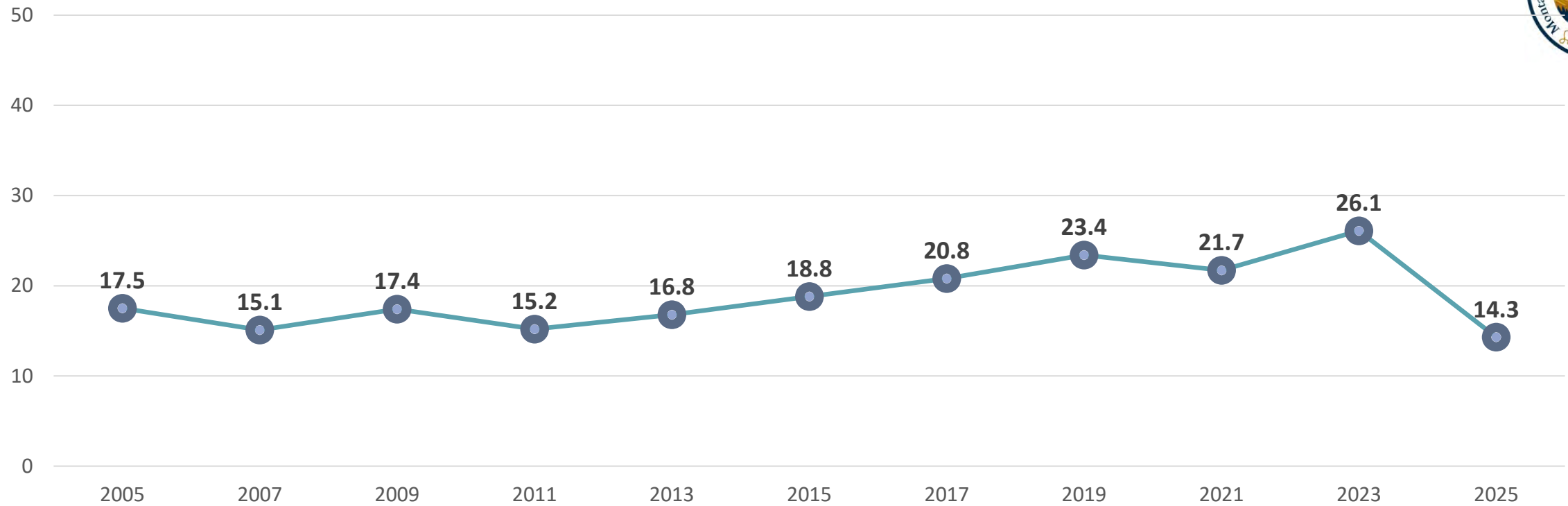


Felt so sad or hopeless for 2 weeks or more in a row that they stopped doing usual activities, past 12 months

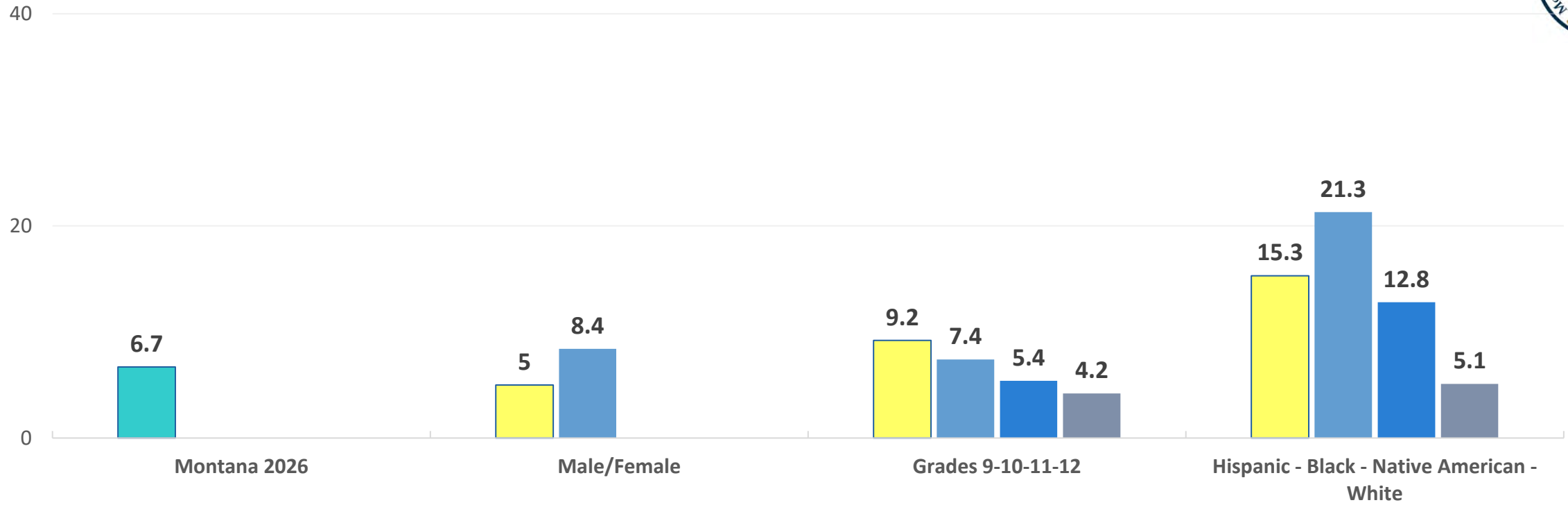




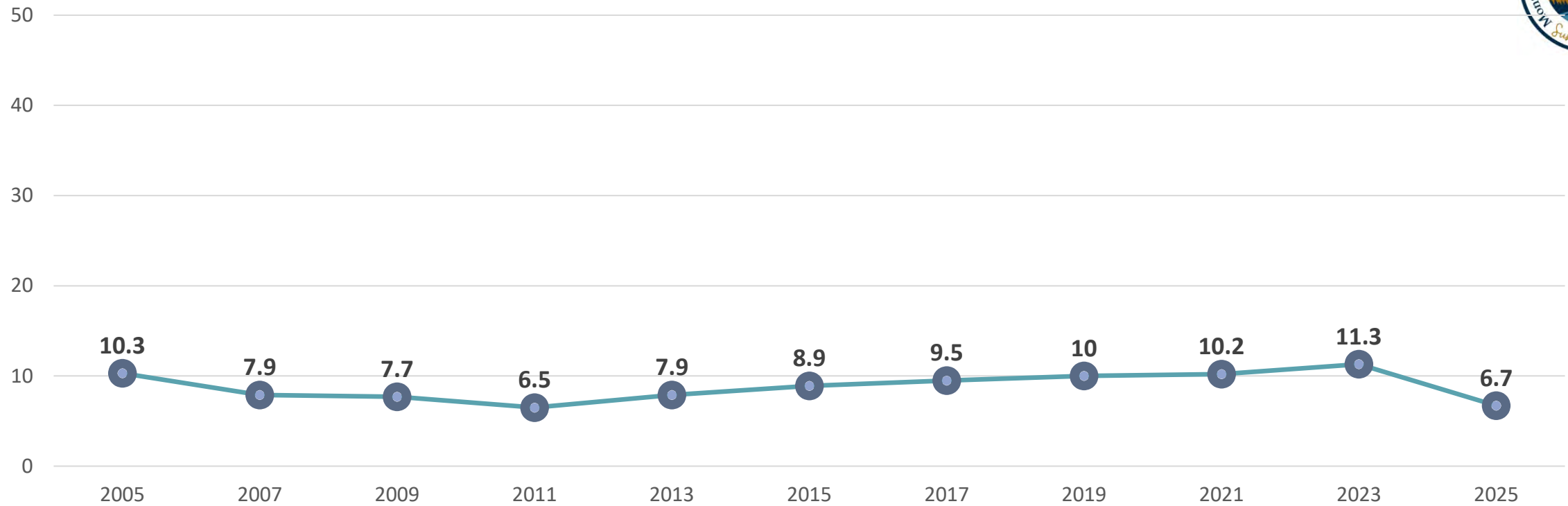
Seriously considered attempting suicide, past 12 months



Seriously considered attempting suicide, past 12 months



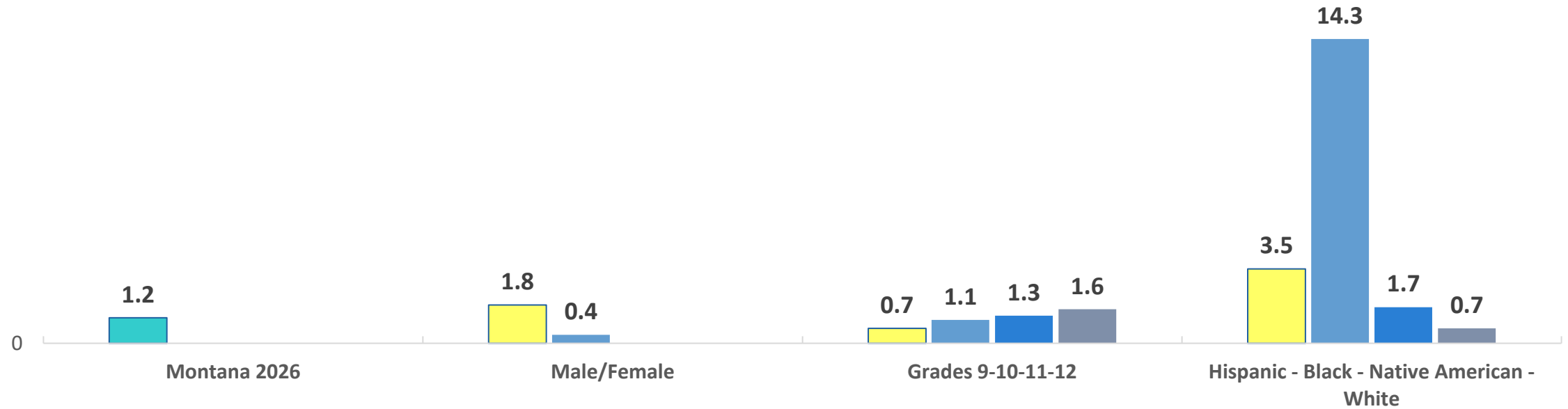
Attempted suicide, past 12 months



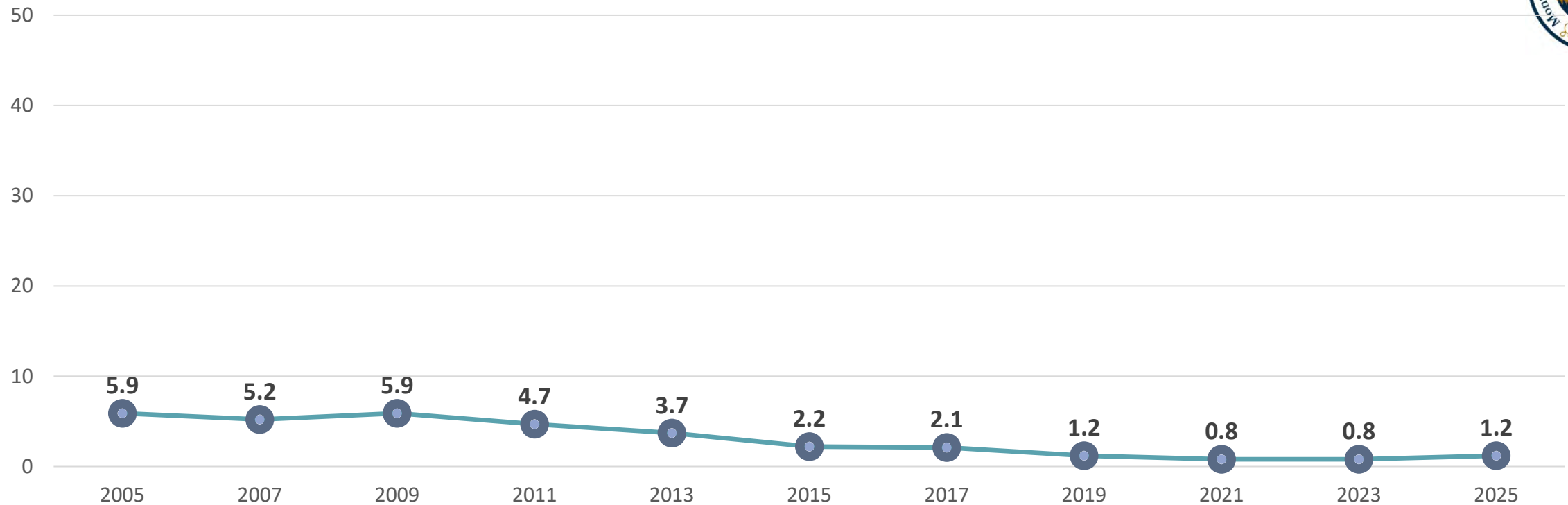
Attempted suicide, past 12 months



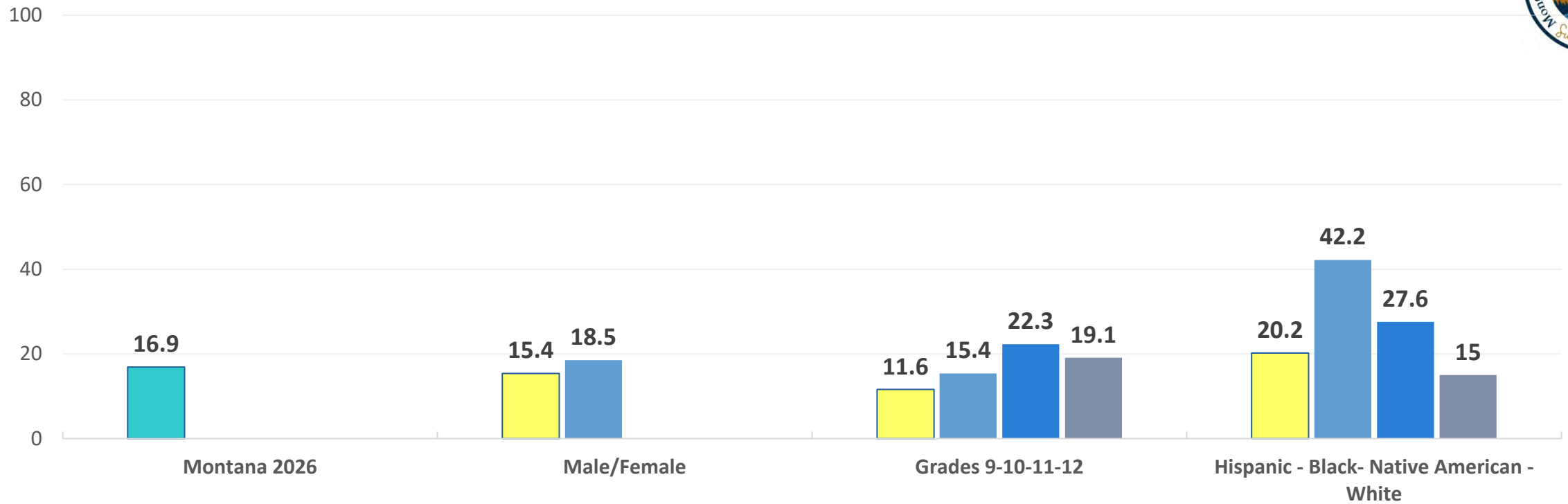
20



Currently smoked cigarettes, past 30 days

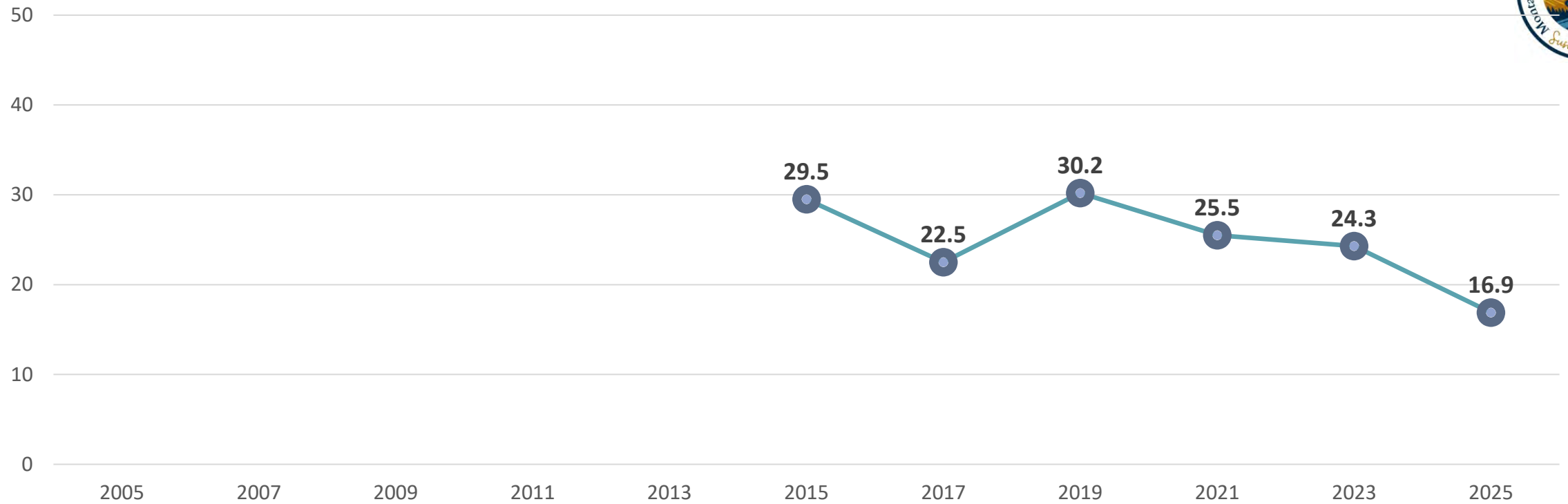


Currently smoked cigarettes, past 30 days

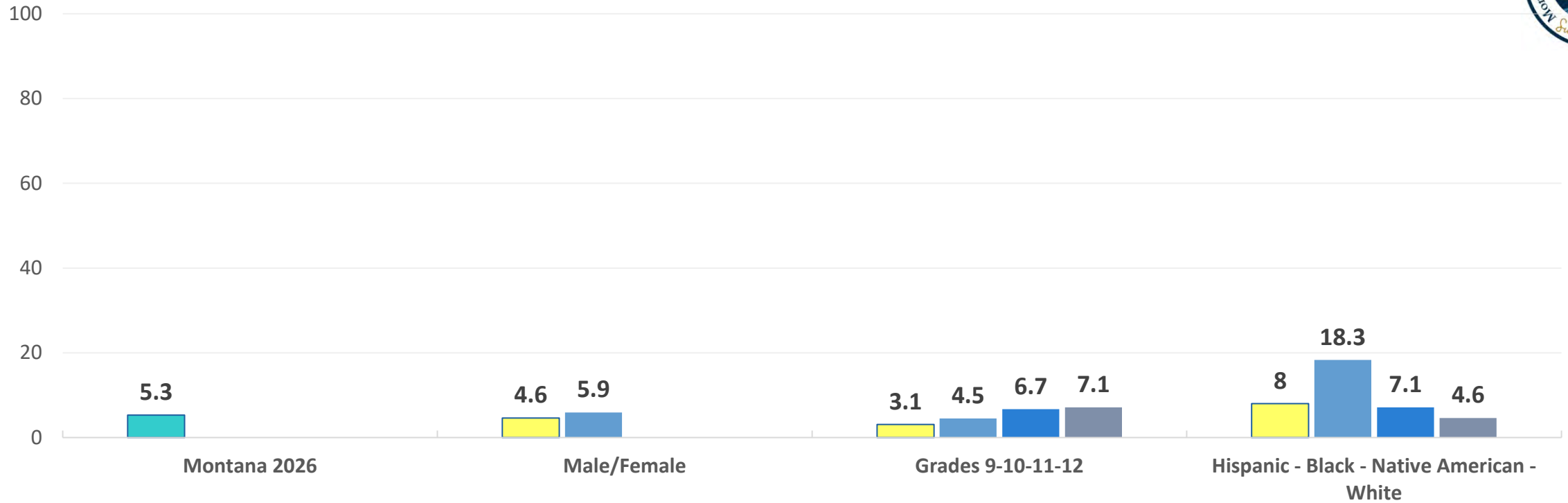


Currently used an electronic vapor product, past 30 days

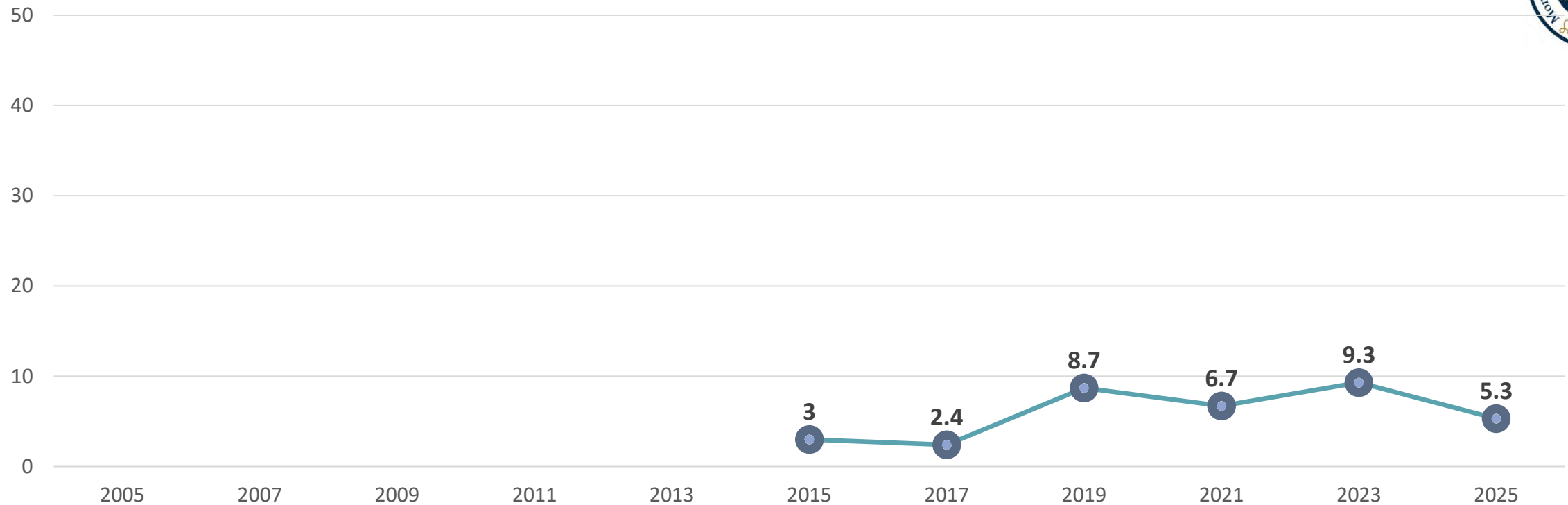




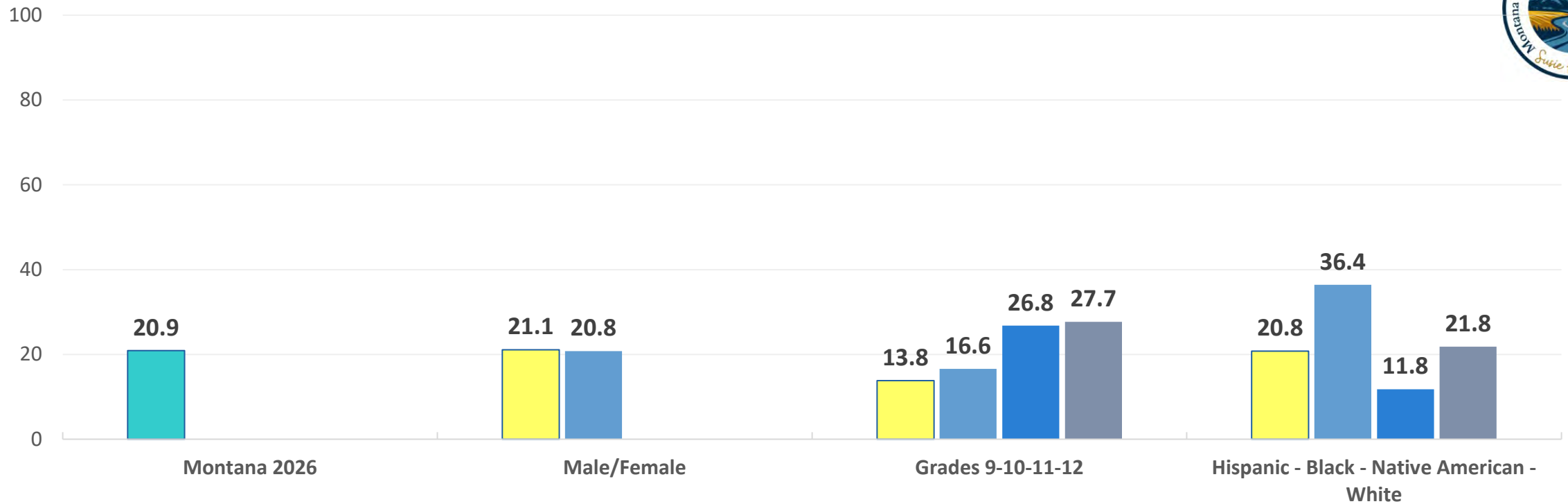
Currently used an electronic vapor product, past 30 days



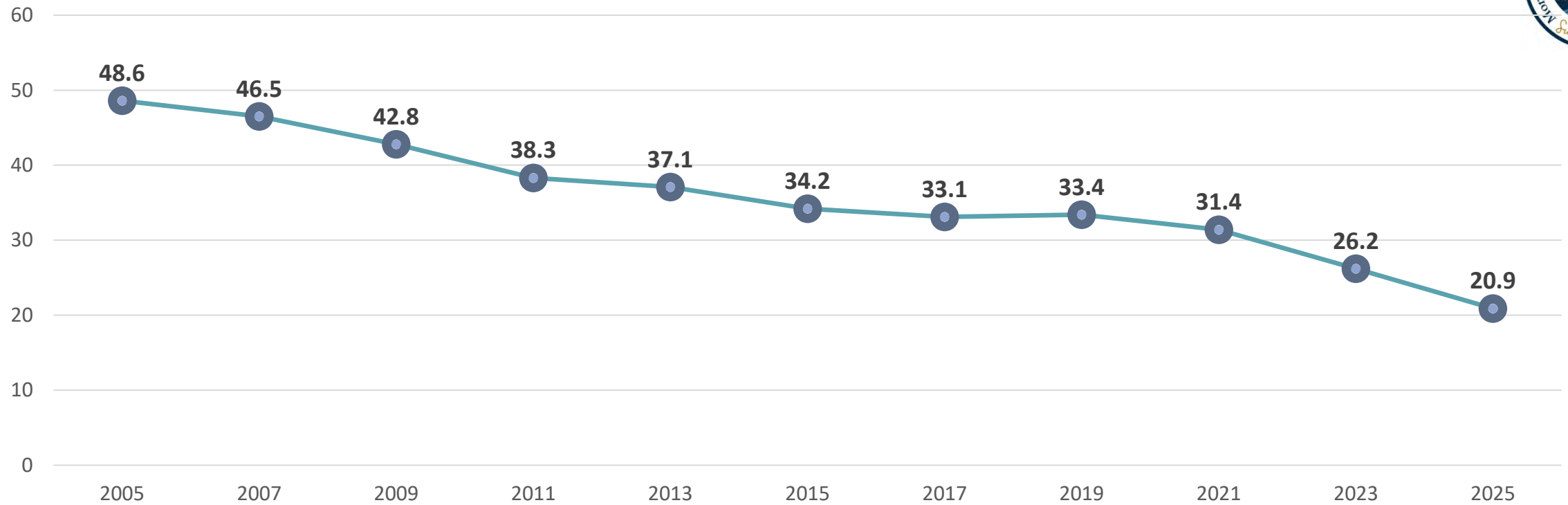
Currently used an electronic vapor product daily, past 30 days



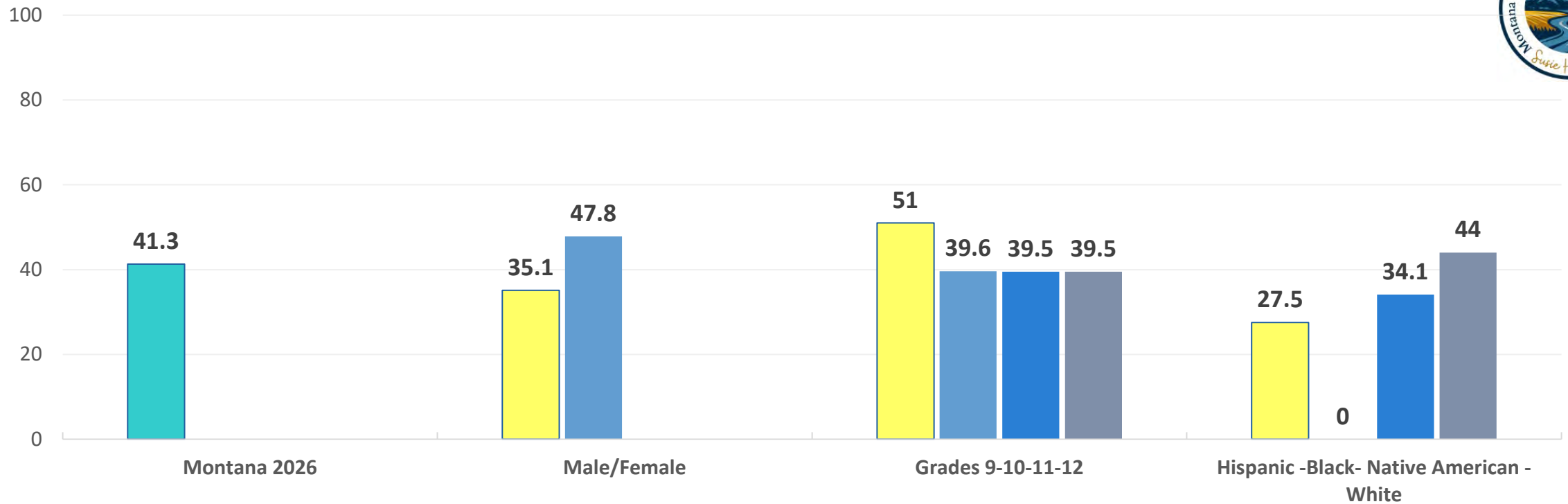
Currently used an electronic vapor product daily, past 30 days



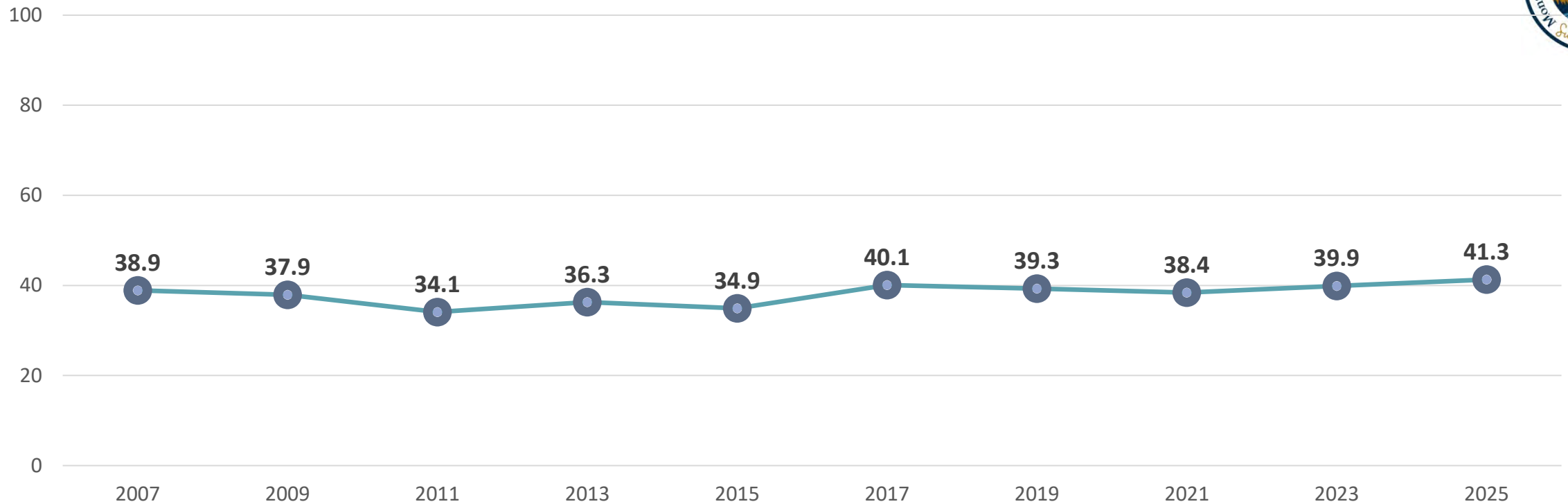
Currently had a drink of alcohol, past 30 days



Currently had a drink of alcohol, past 30 days

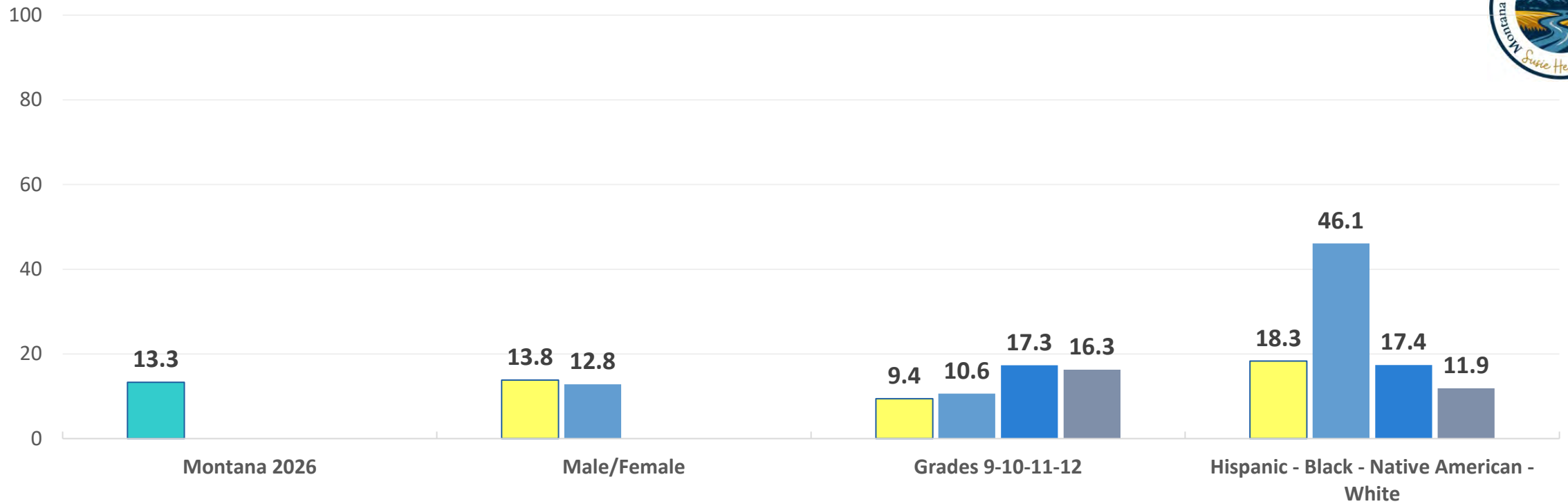


Received alcohol they drank from someone else giving it to them, past 30 days

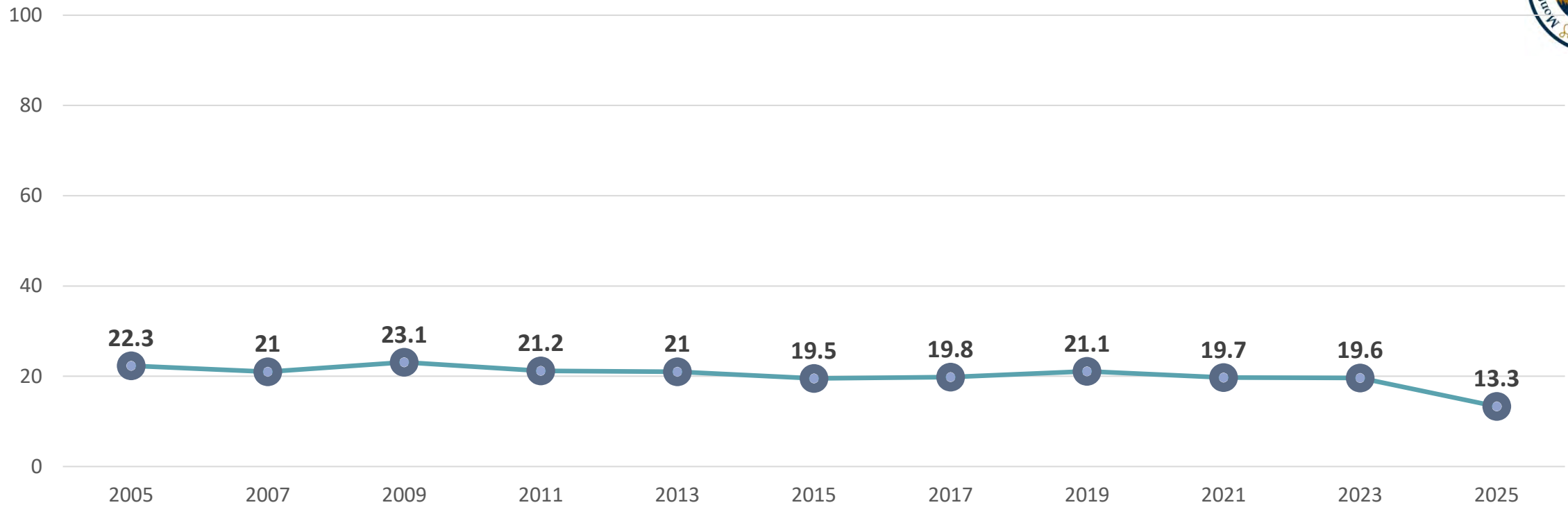


Received alcohol they drank from someone else giving it to them, past 30 days



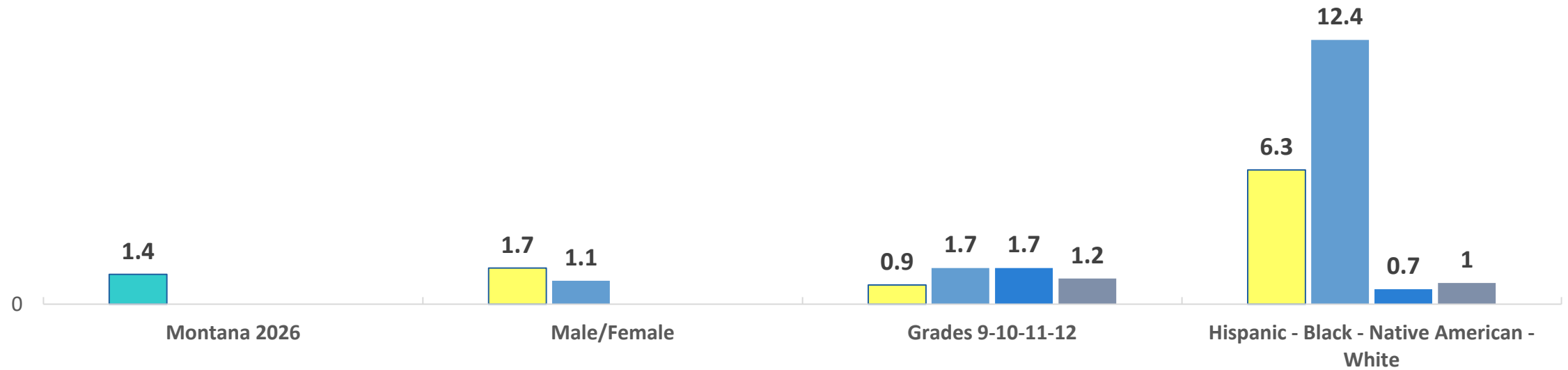


Currently used marijuana, past 30 days

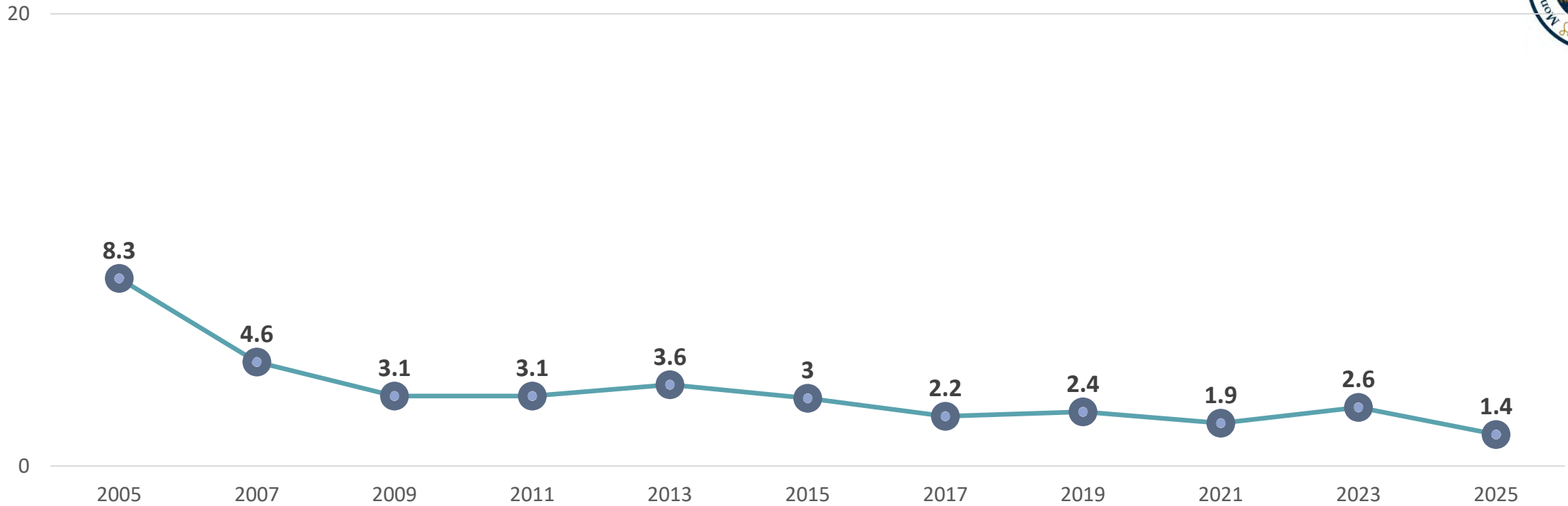


Currently used marijuana, past 30 days

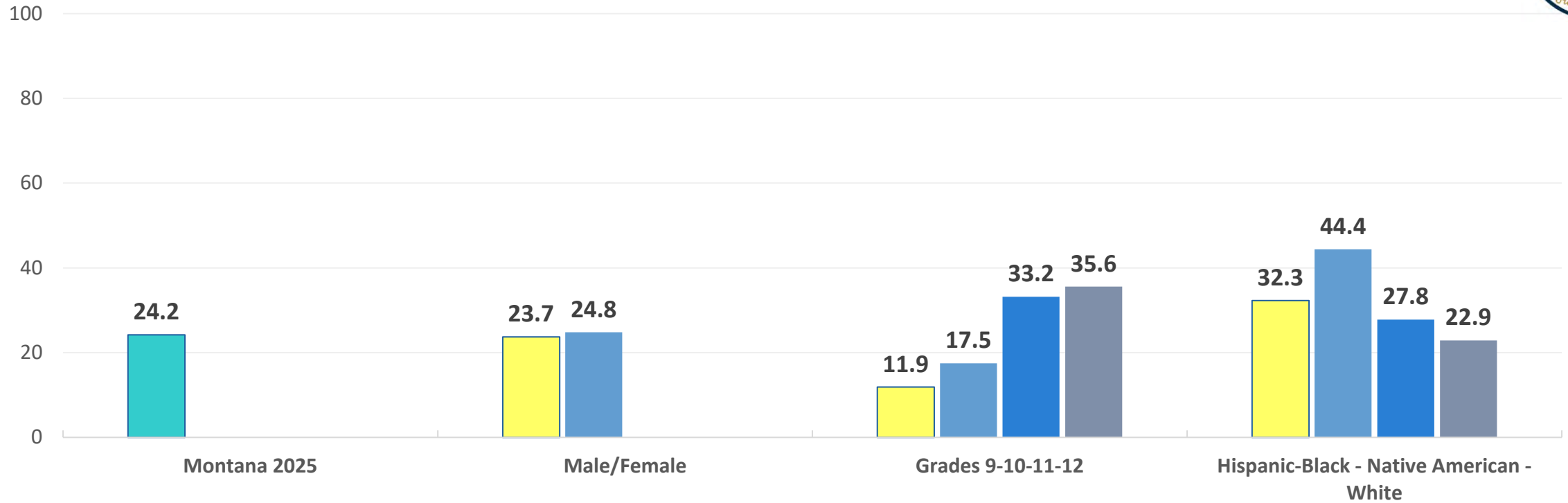
20



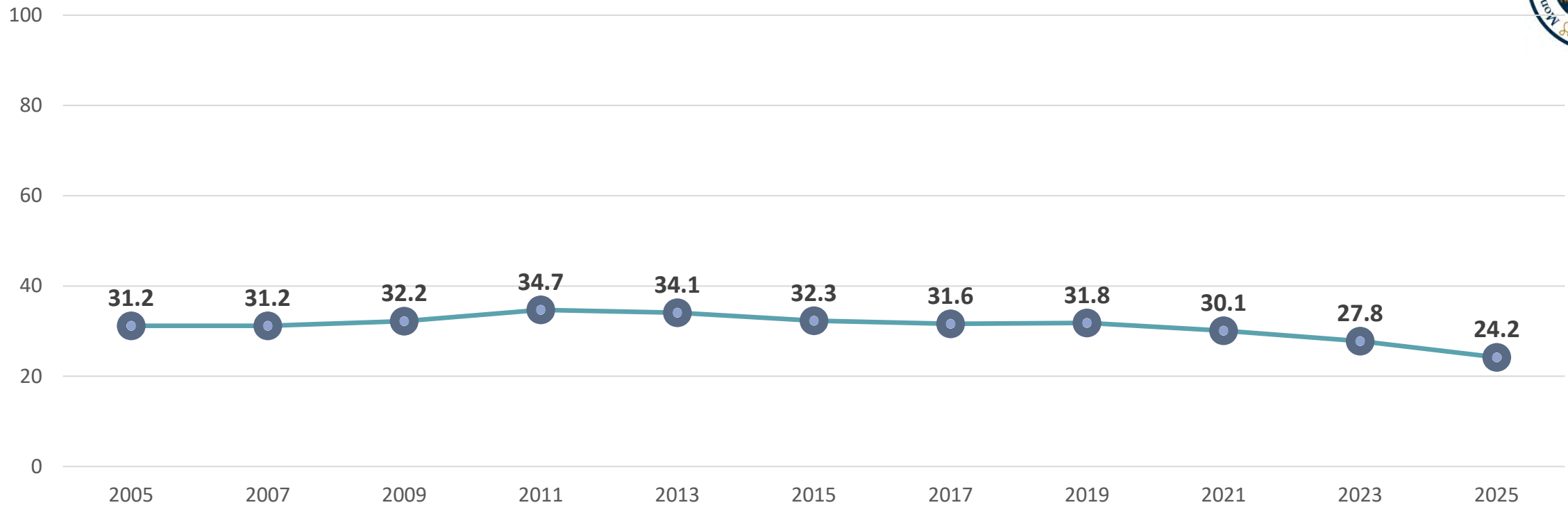
Ever used methamphetamines one or more times  
during their lives



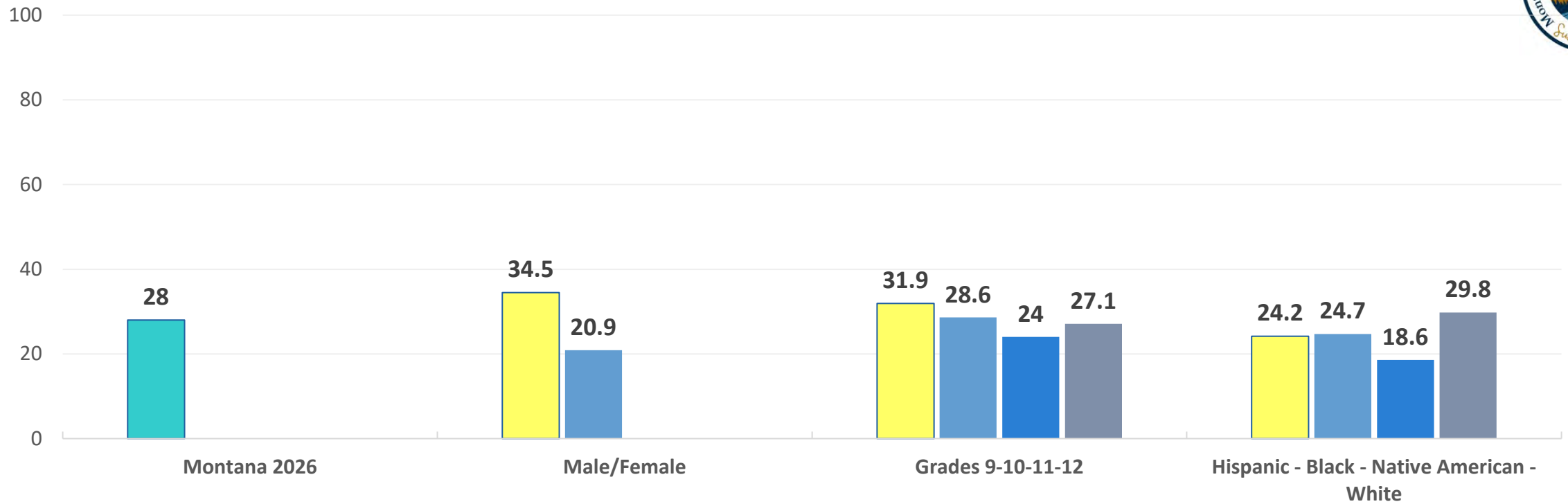
Ever used methamphetamines one or more times during  
their lives



Were currently sexually active, past 3 months

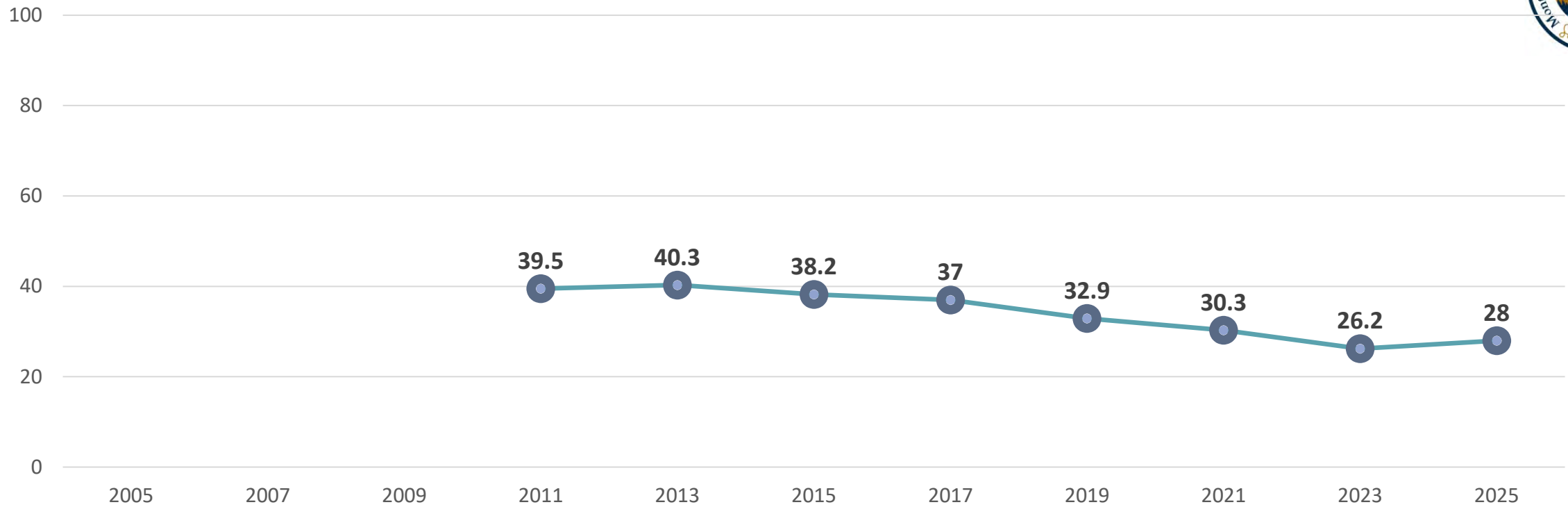


Were currently sexually active, past 3 months

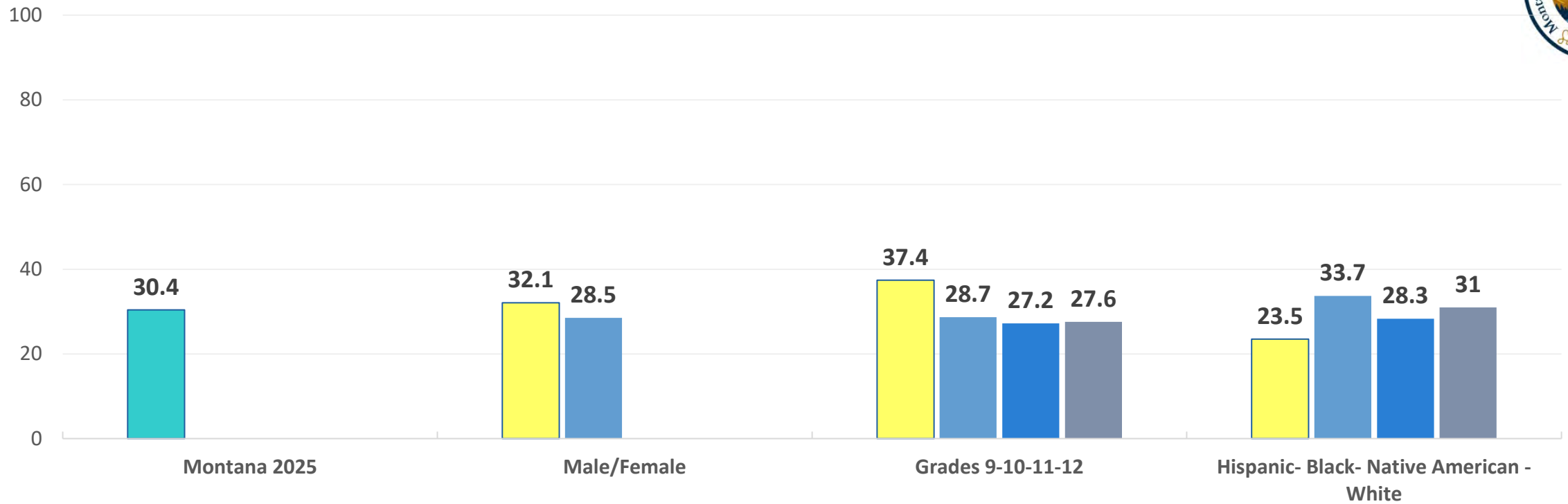


Ate breakfast daily, past 7 days

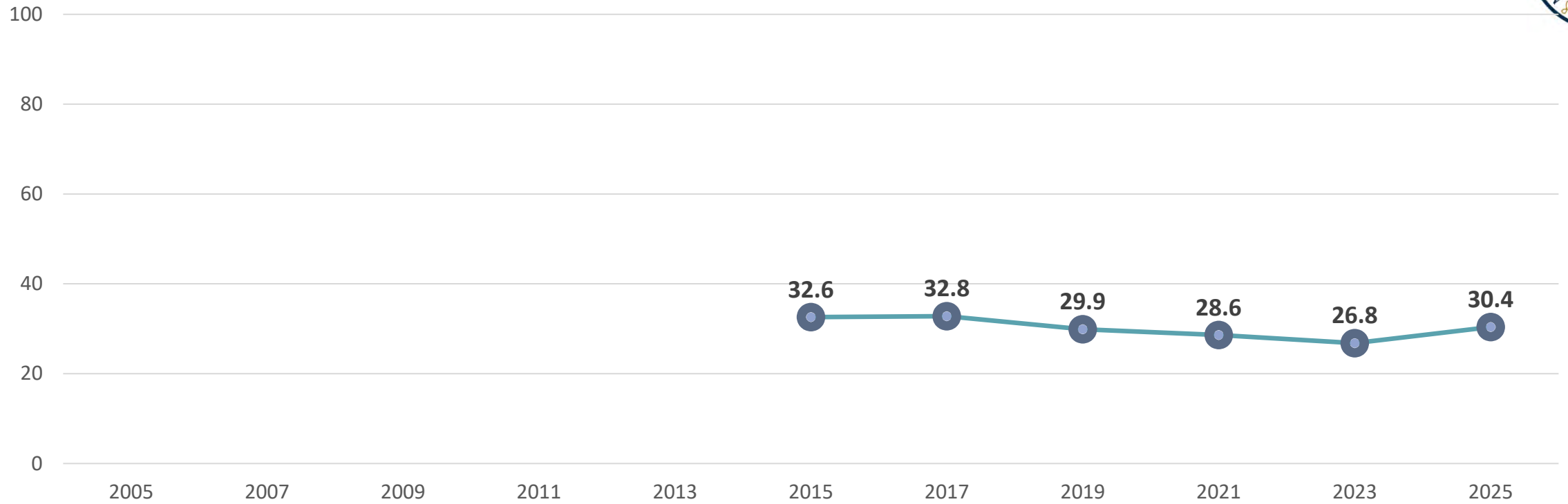




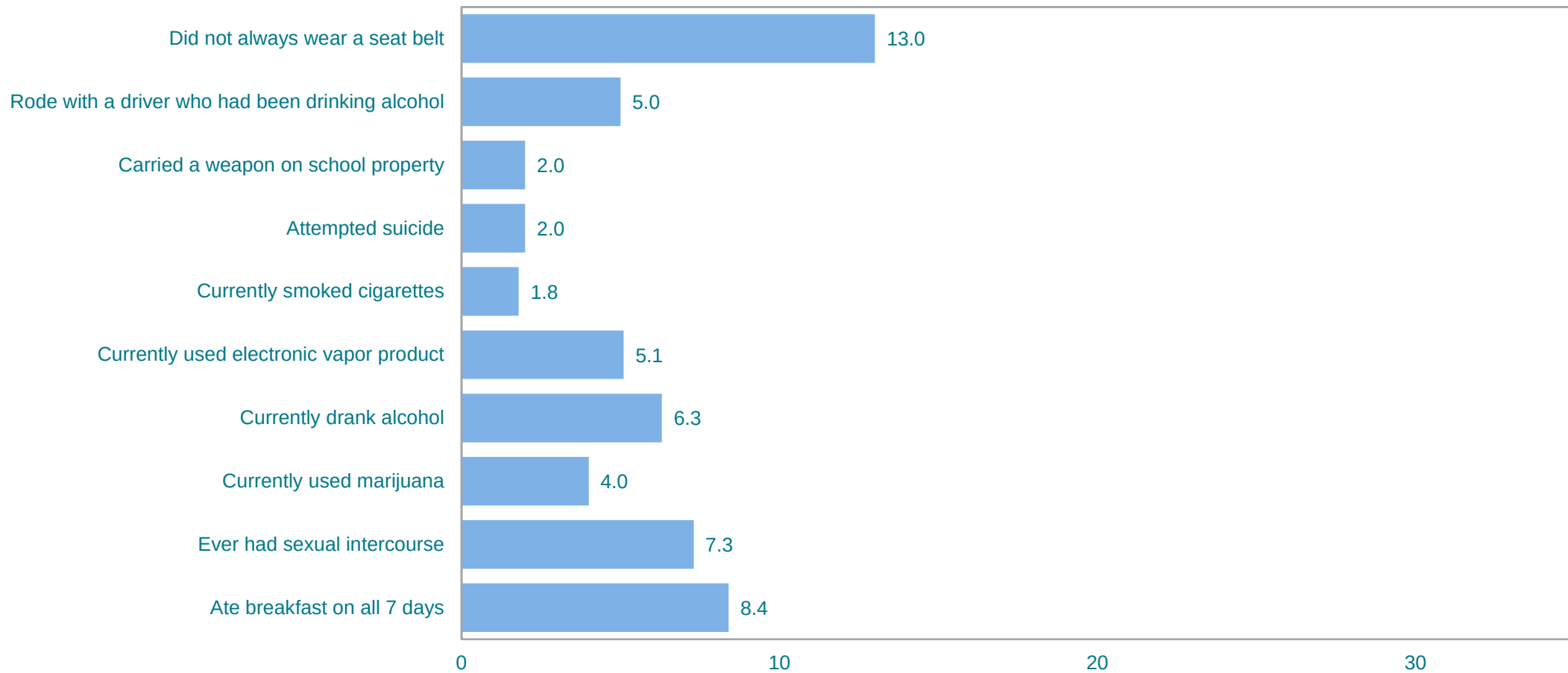
Ate breakfast daily, past 7 days



Got 8 or more hours of sleep on an average school night



Got 8 or more hours of sleep on an average school night



Number of students in a class of 30 who:



# Youth Risk Behavior Survey

Genie Zeeck  
genie.zeeck@mt.gov

Montana Office of  
Public Instruction

---

[WWW.OPI.MT.GOV/LEADERSHIP/ DATA-REPORTING/YOUTH-RISK-BEHAVIOR-SURVEY](http://WWW.OPI.MT.GOV/LEADERSHIP/ DATA-REPORTING/YOUTH-RISK-BEHAVIOR-SURVEY)

**ITEM 22**

**ACTION ON THE PROPOSED NOTICE OF  
PUBLIC HEARING AND TIMELINE  
PERTAINING TO RULEMAKING IN ARM  
TITLE 10, CHAPTER 64, TRANSPORTATION  
STANDARDS AND AUTHORIZE FILING OF  
THE NOTICE WITH THE SECRETARY OF  
STATE FOR PUBLICATION IN THE  
MONTANA ADMINISTRATIVE REGISTER**

**Dr. Tim Tharp**



**MONTANA  
ADMINISTRATIVE  
REGISTER**



**BOARD OF PUBLIC EDUCATION**

---

**NOTICE OF PROPOSED RULEMAKING**

**MAR NOTICE NO. 2026-177.1**

**Summary**

Amendment of ARM 10.64.301 pertaining to the Montana School Bus Standards

---

**Hearing Date and Time**

Thursday, September 3, 2026, at 10:00 a.m.

**Virtual Hearing Information**

Please click the link below to join the webinar:

<https://mt-gov.zoom.us/j/84143141109>

**Comments**

Comments may be submitted using the contact information below. Comments must be received by Thursday, September 10, 2026, at 5:00 p.m.

---

**Accommodations**

The agency will make reasonable accommodations for persons with disabilities who wish to participate in this rulemaking process or need an alternative accessible format of this notice. Requests must be made by Thursday, August 20, 2026, at 5:00 p.m.

---

**Contact**



## **General Reasonable Necessity Statement**

The Board of Public Education is responsible for adopting and enforcing standards for the design, construction, and operation of school buses in Montana pursuant to 20-10-111, MCA. The current rule incorporates the *Standards for School Buses in Montana – 2022*, which are based in part on the National Congress on School Transportation (NCST) National School Transportation Specifications and Procedures.

The proposed amendments update the *Standards for School Buses in Montana* to reflect current federal motor vehicle safety requirements, recommendations of the National Congress on School Transportation where appropriate, technological advancements in school bus equipment, and operational best practices identified through collaboration with the Office of Public Instruction, the Montana Highway Patrol, school transportation professionals, and the Montana Pupil Transportation Advisory Council.

The revisions are necessary to ensure Montana's school bus standards remain current, promote consistency in the procurement, inspection, and operation of school buses statewide, and enhance the safety of students, drivers, and the public. The amendments also clarify existing requirements, remove outdated provisions, and improve the usability of the standards for school districts, school bus contractors, manufacturers, and enforcement personnel.

A complete summary of the proposed revisions to the Standards for School Buses in Montana is available for public review on the Board of Public Education's website at [bpe.mt.gov](http://bpe.mt.gov).

---

## **Rulemaking Actions**

### **AMEND**

The rules proposed to be amended are as follows, stricken matter interlined, new matter underlined:

### **10.64.301 SCHOOL BUS REQUIREMENTS**

- (1) The Board of Public Education adopts and incorporates the Standards for School Buses in Montana – ~~2022~~2026. A copy of this document is available from the Office of Public Instruction, Pupil Transportation Division, P.O. Box 202501, Helena,

Montana 59620-2501 and is available at the following web address:  
[www.bpe.mt.gov](http://www.bpe.mt.gov).

- (2) The Board of Public Education adopts standards for school buses in Montana in part from the National School Transportation Specifications and Procedures, as adopted in ~~2015~~2025 by the ~~Sixteenth~~Seventeenth National Congress on School Transportation (NCST). The NCST occasionally issues an interpretation on its adopted specifications and procedures. Any interpretation adopted by the NCST shall be the official interpretation of the corresponding Montana standard unless that interpretation is specifically redefined or preempted by a corresponding Montana standard, law, or regulation. The National School Transportation Specifications and Procedures and additional information regarding the NCST are available at [www.NCSTOnline.org](http://www.NCSTOnline.org).

**Authorizing statute(s):** Mont. Const. Art. X, sec. 9, 20-2-114, 20-2-121, MCA

**Implementing statute(s):** Mont. Const. Art. X, sec. 9, 20-2- 121, 20-3-106, 20-7-101, 20-10-111, MCA

---

### **Small Business Impact**

The Board of Public Education adopts rules that primarily impact teachers, administrators, and school district operations. The board works in cooperation with public schools across the state to implement the rules that are adopted. Given that the board does not work directly with small businesses, the small business impact analysis performed as required under 2-4-111, MCA, indicates that no small businesses are likely to be directly impacted by the proposed rule changes.

---

### **Bill Sponsor Notification**

The bill sponsor contact requirements of 2-4-302, MCA, do not apply.

---

### **Interested Persons**

The board maintains a list of interested persons who wish to receive notices of rulemaking actions proposed by this agency. Persons who wish to have their name added to the list shall make a written request that includes the name, email, and mailing address of the person to receive notices and specifies for which program the person wishes to receive notices. Notices

will be sent by email unless a mailing preference is noted in the request. Such written request may be mailed or delivered to the contact person above or may be made by completing a request form at any rules hearing held by the board.

---

**Rule Reviewer**

McCall Flynn

**Approval**

Dr. Tim Tharp  
Board Chair



# Board of Public Education

## Board of Public Education Proposed Chapter 64 Rulemaking Timeline Transportation Standards

|                                                                             |                       |
|-----------------------------------------------------------------------------|-----------------------|
| BPE authorization to publish Proposal Notice, including public hearing date | July 22-24, 2026      |
| BPE approves rulemaking timeline                                            | July 22-24, 2026      |
| Proposal Notice to SOS for publication in MAR                               | July 28, 2026         |
| MAR publication of Proposal Notice                                          | August 7, 2026        |
| ▪ Public comment begins                                                     |                       |
| Public hearing date                                                         | September 3, 2026     |
| Final public comment deadline                                               | September 10, 2026    |
| Respond to comments                                                         | September 24-25, 2026 |
| BPE authorization to publish Adoption Notice                                | January 2027          |
| Adoption Notice to SOS for publication in MAR                               | January 2027          |
| MAR publication of Adoption Notice                                          | January 2027          |
| Effective date of rules                                                     | February 2027         |

*The Board of Public Education may revise the above dates, based on the requirements of the Montana Administrative Procedure Act and the rulemaking statutes.*

❖ **ARTIFICIAL TECHNOLOGY COMMITTEE – (Item 23)**

**Dr. Hannah Nieskens**

**ITEM 23**

**PRESENTATION ON ARTIFICIAL  
TECHNOLOGY GUIDANCE**

**Dr. Jason Nieffer, Montana Digital Academy  
Tyler Capece  
Lucas Rowsey**

❖ **LICENSURE COMMITTEE – (Items 24-27)**

**Dr. Ron Slinger**

**ITEM 24**

**ACTION ON THE DRAFT COUNCIL FOR  
THE ACCREDITATION OF EDUCATOR  
PREPARATION MEMORANDUM OF  
UNDERSTANDING**

**Dr. Julie Murgel  
Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Council for Accreditation of Educator Preparation (CAEP) Agreement                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Presenter</b>             | Julie Murgel, Crystal Andrews                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Position Title</b>        | Chief Program Officer<br>Senior Manager, School and Educator Effectiveness<br>Office of Public Instruction                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Overview</b>              | <p>The Partnership Agreement is between three parties: the Montana Board of Public Education, the Montana Office of Public Education, and the Council for the Accreditation of Educator Preparation (CAEP).</p> <p>CAEP is a nongovernment, voluntary association that is a nationally recognized accreditor by the Council for Higher Education Accreditation (CHEA). Through an Accreditation Council, CAEP accredits Educator Preparation Programs (EPPs).</p> <p>The purpose of this partnership agreement is to:</p> <ul style="list-style-type: none"><li>• Outline preferences about program review options,</li><li>• Review team compositions for accreditation site review conducted by CAEP of the Montana EPPs, and</li><li>• Establish the responsibilities that each party has in supporting CAEP Accreditation activities for EPPs voluntarily requesting joint reviews.</li></ul> <p>This partnership agreement is for MT EPPs that elect to have joint accreditation for the state of Montana and CAEP. The agreement is for one year, from July 1, 2026, to June 30, 2027.</p> |
| <b>Requested Decision(s)</b> | Action Item                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Related Issue(s)</b>      | None                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Recommendation(s)</b>     | Recommending that the BPE approve the CAEP MOU for one (1) year.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)



**Montana Board of Public Education,  
The Montana State Superintendent of Public Education,  
and  
The Council for the Accreditation of Educator Preparation (CAEP)  
Partnership Agreement**

Whereas, CAEP is a nongovernmental, voluntary membership organization committed to the effective preparation of teachers and other P-12 professional educators; and

Whereas, CAEP, through an autonomous Accreditation Council, accredits educator preparation providers (EPPs) and advances excellent educator preparation through evidence-based accreditation that assures quality and supports continuous improvement to strengthen P-12 student learning; and

Whereas, CAEP is a nationally recognized accreditor, having earned recognition by the Council for Higher Education Accreditation (CHEA); and

Whereas, the Montana Board of Public Education (BPE) and the Montana Office of Public Instruction (OPI) support continuous improvement in educator preparation; and

CAEP, BPE, and OPI hereby enter into this agreement detailing OPI and BPE's preferences with regard to program review options and review team composition for accreditation Site Reviews conducted by CAEP of EPPs operating within the State of Montana and establishing the primary responsibilities each party has in supporting CAEP's accreditation activities involving all such EPPs.

**1. CAEP Standards and Scope of Accreditation**

The Parties understand and agree that:

The CAEP Board of Directors (CAEP Board or Board) has adopted standards (CAEP Standards or Standards) that serve as the basis for all accreditation reviews undertaken by CAEP.

- 1.1. As a result of the ongoing critical self-review that CAEP undertakes to maintain and improve the quality of CAEP accreditation, the CAEP Board will undertake a comprehensive review and revision of the CAEP Standards on a schedule set by the Board and may, as needed, make interim amendments to the Standards. In making any such changes, CAEP will seek stakeholder and public input, including input from BPE, OPI, and EPPs.
- 1.2. It is the responsibility of BPE, OPI, and any EPPs seeking or continuing CAEP accreditation to stay informed of any changes made to the CAEP Standards and the timeline(s) set by the Board for the implementation of or transition to new or revised Standards.
- 1.3. The CAEP scope of accreditation, defined in policy, distinguishes between two levels of educator preparation:
  - 1.3.1.1. Initial-Licensure Preparation is provided through programs at the baccalaureate or

post-baccalaureate levels leading to initial-licensure, certification, or endorsement that are designed to develop P-12 teachers. All Initial-Licensure Preparation programs within the Scope of Accreditation will be reviewed under CAEP Standards for Initial-Licensure.

- 1.3.1.2. Advanced-Level Preparation is provided through programs at the post-baccalaureate or graduate level leading to licensure, certification, or endorsement. Advanced-Level Programs are designed to develop P-12 teachers who have already completed an initial-licensure program, currently licensed administrators, other certificated (or similar state language) school professionals for employment in P-12 schools/districts. All Advanced-Level programs within the Scope of Accreditation will be reviewed under CAEP Standards for Advanced-Level Preparation.

## **2. CAEP's Responsibility for Education Preparation Provider (EPP) Accreditation**

The Parties understand and agree that:

- 2.1. CAEP, through the Accreditation Council, has sole responsibility for granting CAEP accreditation to an EPP, and for supporting and overseeing accredited EPPs through continuous accreditation and the CAEP eligibility processes described in CAEP policy.
- 2.2. The process required for accreditation by CAEP is outlined in policies and procedures. Policies and procedures may be revised from time to time. It is the responsibility of any EPP seeking CAEP accreditation to stay informed of any such changes as they may impact the CAEP accreditation process from the time of their adoption or publication. It is the responsibility of CAEP to timely inform BPE and OPI of any such changes.

## **3. BPE's Responsibility for Program Approval**

The Parties understand and agree that:

- 3.1. BPE has responsibility for program approval. In granting program approval, BPE will utilize information generated from CAEP's review(s) of an EPP, including but not limited to an Accreditation Council decision on CAEP accreditation and the assignment of any Areas for Improvement (AFIs) and Stipulations, as described in CAEP policy. Although BPE may elect to have state-specific standards and/or requirements incorporated into the CAEP review, consistent with the program review options outlined below, only information gathered on an EPP's compliance with CAEP Standards and requirements will be used by the Accreditation Council to make a decision.

BPE will periodically review its program review requirements against the CAEP Standards and policies and will, in a timely manner, make CAEP aware of any conflicts or potential inconsistencies so that all parties to this agreement are aware of any such issues and can work constructively together to minimize any challenges that may arise from them.

## **4. CAEP Accreditation Cycle**

The Parties understand and agree that:

- 4.1. The CAEP accreditation cycle involves an EPP in continuous improvement and requires an EPP to demonstrate that it meets CAEP's high standards of quality required to improve P-12 student learning.
- 4.2. To merit full accreditation by CAEP, an EPP must meet all CAEP Standards on the basis of sufficient and accurate evidence.
- 4.3. A Site Review, carried out by an Evaluation Team, is an essential part of the accreditation process. Members of the assigned team investigate the quality of an EPP's evidence, including the accuracy and consistency of the evidence provided in relation to CAEP Standards. In accordance with CAEP policy, CAEP may utilize a virtual site review or may have one or more Evaluation Team members participating using electronic means.
- 4.4. BPE elects that CAEP's reviews of EPPs in the State of Montana will be carried out using Evaluation Teams composed as follows:
  - 4.4.1. **Joint Review Team.** For any review except one required in conjunction with an accreditation decision of Accreditation with Stipulations or Probationary Accreditation, the composition of the Evaluation Team will be as follows:
    - 4.4.1.1. For a Review involving only one level of accreditation (i.e., initial or advanced), the Joint Review Team includes four national reviewers appointed by CAEP and one reviewer appointed by OPI.
    - 4.4.1.2. For a Review involving both levels of accreditation, initial and advanced-level, the Evaluation Team will include five CAEP-appointed reviewers and one OPI-appointed reviewer.
    - 4.4.1.3. For a Stipulation or Probation review, the Evaluation Team is comprised of two CAEP-appointed reviewers. OPI may choose to add one reviewer for a total of a three-person team. The lead reviewer is appointed by CAEP.
    - 4.4.1.4. OPI shall provide CAEP with its recommended Evaluation Team members within any timelines established by CAEP. If OPI is unable to appoint members, CAEP will appoint from its pool of volunteers trained to serve as Evaluation Team members a CAEP-only team. All such teams are led by an Evaluation Team chair (or Evaluation Team leader) appointed by CAEP.
- 4.5. Prior to assignment to any CAEP Evaluation Team, an individual must have successfully completed CAEP training for review team members and must acknowledge understanding of, and agreement to, adhere to CAEP's code of conduct, including with regard to confidentiality and conflicts of interest.
- 4.6. Each Evaluation Team shall include a P-12 practitioner, when possible. OPI will make recommendations for P-12 practitioners through the CAEP accreditation platform.
- 4.7. At OPI's discretion, the State of Montana's teachers' association(s) may appoint one (1) representative per association to observe the Site Review. Any expenses associated with the attendance of an observer must be covered by the association(s). Prior to participation, any observer

must acknowledge understanding of an agreement to adhere to CAEP's policies and procedures regarding Site Reviews and the CAEP code of conduct, including with regard to confidentiality and conflicts of interest.

- 4.8. All Site Review activities undertaken by a CAEP Evaluation Team will be conducted in accordance with CAEP policies and procedures.
- 4.9. CAEP is not responsible for Site Review expenses for OPI-assigned personnel.
- 4.10. An EPP that is subject to BPE's jurisdiction may choose from among any of the following program review options for CAEP accreditation:
  - 4.10.1. **Specialty Program Review with National Recognition.** The goal of the specialized professional association (SPA) Program Review with National Recognition is to align specialty licensure area data with national standards developed by SPAs in order to receive national recognition at the program level. The Evaluation Team will consider evidence that the EPP presents as gathered from the National Recognition decision-making process and made available in SPA program level reports to meet the sufficiency criteria related to CAEP Standard R1, Component R1.2 (Initial) and/or Standard RA.1, Component RA1.2 (Advanced).
  - 4.10.2. **OPI Review by BPE Authority.** OPI conducts program reviews for purposes of BPE approval and to inform CAEP accreditation. An EPP undergoing the OPI Review option will follow BPE rules. OPI provides forms and instructions on how to meet all BPE standards for licensure/certificate program approval. Upon an EPP's completion of the OPI authority forms, trained reviewers are selected and assigned within appropriate content areas. Reviewers make recommendations for further action and/or approval. BPE makes the final decision on the approval of any program. The CAEP Evaluation Team will consider evidence that the EPP presents as gathered from the OPI Review process to meet the sufficiency criteria related to CAEP Standard R1, Component RA1.2 (Initial) and/or Standard RA1, Component RA1.2 (Advanced).
  - 4.10.3. **CAEP Evidence Review of Standard 1/A.1.** Evidence for the CAEP Evidence Review of Standard 1/A.1 process is developed through the analysis of an EPP's outcome assessment data aligned to specialty licensure area standards delineated in CAEP Standard R1, Component RA1.2 (Initial) and/or Standard A1, Component RA1.2 (Advanced). Evidence from the EPP's internal assessment may be used by OPI to determine its alignment with BPE standards in the respective area(s) of licensure to demonstrate candidates' ability to apply content and pedagogical knowledge in the area of licensure.
- 4.11. The specific timeline established for the review of an EPP, as well as CAEP's consideration of any request for an extension, will be decided by CAEP or the Accreditation Council, as appropriate, on a case-by-case basis and in accordance with CAEP policies.
- 4.12. Once granted full accreditation by CAEP, an EPP's term of accreditation shall be seven (7) years. Shorter terms are granted with a decision of Accreditation with Stipulations or Probationary

Accreditation. Throughout its term, to maintain accreditation, an EPP must comply with CAEP policies, including policies regarding payment of annual dues and the submission of annual reports.

- 4.13. An EPP for which the Accreditation Council issues a decision to deny or revoke accreditation may have a right to petition for an appeal subject to CAEP's policy on appeals.
- 4.14. BPE will provide to CAEP its policy leading to a "Change in State Status." BPE will notify CAEP within thirty (30) days of action taken when a CAEP-accredited EPP has had a "Change in State Status" as a result of a decision on specialized professional association (SPA) program status by BPE.
- 4.15. Accreditation-specific terminology and definitions used by CAEP as part of its EPP review and accreditation processes may vary from similar terms and definitions used by BPE and OPI. Any definitions of key terms and glossaries created by CAEP are available on the CAEP website [<http://caepnet.org/glossary>]. BPE and OPI should inquire with CAEP about the definition of any term if there is uncertainty regarding its meaning in the CAEP accreditation context.

## **5. Opportunities for BPE and OPI Input**

The Parties understand and agree that:

- 5.1. CAEP will afford BPE and OPI multiple opportunities to provide CAEP, the Evaluation Team, and members of the Accreditation Council with any information or data BPE or OPI deems relevant to the accreditation of an EPP, as follows:
- 5.2. At least sixteen (16) weeks prior to any scheduled Site Review, CAEP will give OPI notice of the upcoming Site Review. At any time, up to six (6) weeks before the scheduled Site Review, the BPE and OPI may provide CAEP with comments and information on the EPP for consideration by the Evaluation Team. EPPs will be given an opportunity to respond to any such comments prior to the Site Review.
- 5.3. At any time, BPE or OPI may file a complaint regarding an EPP with the Accreditation Council for investigation and consideration as part of the EPP's ongoing cycle of CAEP accreditation. In accordance with CAEP policy, adverse action may result from any such investigation.
- 5.4. In the event an EPP within the State of Montana petitions for the appeal of an adverse action of the Accreditation Council, CAEP will notify BPE and OPI that such petition has been received. Any notification of a decision made by an ad-hoc appeal panel will be made in accordance with Section 7, below, and the detailed notification provisions included in CAEP policy.

## **6. Decisions of the Accreditation Council and an Ad-Hoc Appeals Council**

The Parties understand and agree that:

- 6.1. The Accreditation Council makes decisions regarding the accreditation of EPPs at meetings held not less than two (2) times each year.

- 6.2. Following any decision of the Accreditation Council to deny or revoke the accreditation of an EPP, the EPP is promptly informed of its option to file a petition for an appeal and appeal requirements. Appeals criteria and process information are included in CAEP's policies on appeals.
- 6.3. CAEP provides written notice of each decision of the Accreditation Council and an Ad-hoc Appeal Panel in accordance with CAEP policies.
- 6.4. The written notice CAEP provides regarding its accrediting decisions, includes notice to BPE and OPI. CAEP's policies regarding notices specify any other parties to which notice must be provided and the respective timelines for each.

## **7. Data Sharing**

The Parties understand and agree that:

- 7.1. The CAEP Standards and process for CAEP Accreditation require an EPP to collect and share data. To the extent that OPI maintains data necessary for CAEP's review of an EPP, subject to any data sharing agreement that may exist between an EPP and OPI, CAEP expects that OPI will make the relevant data available to EPPs at no cost, in a timely manner, with all personally identifiable information removed or redacted, and with all appropriate permissions to use the data for CAEP accreditation activities. Any requests for data must be made according to OPI's data sharing policy, and all data sharing must be done in accordance with state and federal law and pursuant to a data-sharing agreement.
- 7.2. In order to facilitate the reviews necessary for CAEP accreditation, CAEP will provide OPI and each dues-paying EPP in the State of Montana with access to the CAEP accreditation platform, CAEP's data and information management system. Should OPI or any EPP fail to pay annual dues to CAEP in a timely manner, CAEP reserves the right to suspend access to the CAEP accreditation platform until any outstanding dues are paid.
- 7.3. CAEP policies and the CAEP accreditation platform include information on the confidential nature of information maintained within the CAEP accreditation platform. All CAEP accreditation platform users must acknowledge CAEP's confidentiality policy and agree to adhere to it.

## **8. Partnership Dues, OPI Benefits, and Fees for Additional Services**

The Parties understand and agree that:

9. OPI will be responsible for payment of annual State Partnership dues (See Appendix A). Dues may be reviewed and updated annually by CAEP according to the formula set forth in Appendix A. Should the amount of OPI's annual State Partnership dues be changed during the term of this agreement, CAEP will notify OPI of the new dues amount and the effective date.
- 9.1. CAEP will provide up to three (3) individuals employed by OPI with access to the CAEP accreditation platform.

- 9.2. During each year covered by this agreement, CAEP will waive the CAEP State Clinic and CAEP Conference registration fee for one (1) designated OPI representative; however, the OPI or OPI representative must assume other expenses associated with conference participation.
- 9.3. CAEP offers states access to CAEP National Training for up to five (5) site reviewers a year, including training and travel (additional participants may be added based on need and on a cost-recovery basis). CAEP may also offer supplemental training opportunities for OPI reviewers. Supplemental training events that are arranged, including events in the State of Montana, will be provided by CAEP on a cost-recovery basis and with specific arrangements negotiated according to CAEP's policies regarding fees and expenses for training.
- 9.4. OPI will work with associations that represent P-12 educators (NEA, AFT, NBPTS), EPPs, and education administrators to establish credit toward continuing education units or professional development requirements at the local district level in return for the State of Montana's P-12 educators' professional contributions to the work of CAEP as site review team members

## **10. BPE, OPI, and CAEP Contacts**

The Parties understand and agree that the following are the designated liaisons to serve as primary contacts for the other parties throughout the term of this agreement. If any party changes its designated contact, it must timely notify all other parties of the change:

- 10.1. OPI's designated liaison is:
- 10.2. BPE's designated liaison is:
- 10.3. CAEP's designated liaison is:

## **11. Agreement Term and Amendments**

The Parties understand and agree that:

- 11.1. CAEP, OPI, and BPE enter into this partnership agreement for the one (1)-year period beginning July 1, 2026, and ending on June 30, 2027.
- 11.2. The Parties will review this agreement at least annually and, as necessary, propose any amendment deemed appropriate and which may be adopted upon the agreement of the Parties.
- 11.3. Should any provision of this agreement be determined to be in conflict with CAEP policy, CAEP policy will be the prevailing authority and this agreement will be required to be amended to resolve the conflict.
- 11.4. Notwithstanding the annual review described above, this agreement may be modified by consent of the Parties at any point.



\_\_\_\_\_  
Christopher Koch, President  
Council for the Accreditation of Educator Preparation

\_\_\_\_\_  
DATE

By signing this agreement, the undersigned agrees to be bound by the terms outlined above and affirms that he or she has the authority to enter into this agreement on behalf of the State (BPE).

\_\_\_\_\_  
Tim Tharp, Chair  
Montana Board of Public Education

\_\_\_\_\_  
DATE

\_\_\_\_\_  
Susie Hedalen, Superintendent  
Montana Office of Public Instruction

\_\_\_\_\_  
DATE

### **Appendix A: State Dues Structure**

Annual costs for supporting activities associated with State Partnerships have both fixed and proportional components which include costs associated with the CAEP Clinic, fall and spring CAEP Conferences, staff time, technology costs for maintaining workspaces within CAEP's accreditation platform, and other indirect expenses.

For the fixed and proportional amounts, states would be assessed \$1,500 annually (reviewed on an annual basis) to cover expenses for the spring convening and conference registration plus a portion of indirect expenses which are based on the actual percentage of CAEP member EPPs within each state.

#### **Example 1: Joint Reviews**

State A has 25 CAEP member EPPs, or 3.99% of total CAEP EPPs.

- The fixed amount is set at \$1,500 per state.
- The proportional amount is set at 3.99% of \$325,000 (current total=services to all states) = \$12,960.
- The variable joint review fee (for 25 joint reviews) is  $25 \times \$2,500 = \$62,500 / 7 \text{ years} = \$8,930$ .

Therefore, the total fees for State B will be:

$\$1,500 \text{ (fixed)} + \$12,960 \text{ (proportional)} + \$8,930 \text{ (variable joint review fee)} = \$23,390$ .

**ITEM 25**

**INFORMATION ON THE SITE VISIT AND**  
**STATE EXIT REPORT OF THE STONE**  
**CHILD COLLEGE EDUCATOR**  
**PREPARATION PROVIDER IN THE**  
**DEPARTMENT OF EDUCATION**

**Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Review of the State Accreditation Program Report for Stone Child College's Educator Preparation Program (EPP) in the College of Education, April 29-30, 2026.                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Presenter</b>             | Crystal Andrews                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Position Title</b>        | Accreditation and Licensure Senior Manager<br>Office of Public Instruction                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Overview</b>              | <p>The State Superintendent of Public Instruction presents to the Board of Public Education (BPE) the State Accreditation Program Report for Stone Child College's EPP in the College of Education</p> <p>Review the summary of results and overall impressions of the onsite visit on April 29-30, 2026.</p> <p>Susan Sutherland and Jeremy MacDdonald, Co-Heads of the Education Department, will be available virtually to provide comments and respond to questions from the BPE.</p> <p>The State Final and Narrative Reports are included in the BPE Agenda Packet.</p> |
| <b>Requested Decision(s)</b> | Information Only                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Related Issue(s)</b>      | The BPE approval process-<br>September 2026: Recommend action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Recommendation(s)</b>     | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
**opi.mt.gov**



**May 29, 2026**

**TO:** Wilma Tyner  
Dean of Academics  
Stone Child College

**FROM:** Crystal Andrews  
Senior Manager, Accreditation Unit  
Montana Office of Public Instruction

**SUBJECT:** **Final** State Accreditation Program Report 2026

On April 29-30, 2026, the State Accreditation review of the Educator Preparation Provider (EPP) in the College of Education took place virtually at Stone Child College. This site review was conducted by the Montana Office of the Public Instruction (OPI). Prior to the site visit, a cadre of qualified educators including teachers, college professors, administrators and content specialists reviewed the Institutional Reports provided by Stone Child College (SCC) for the endorsement areas. During the onsite review, the OPI team reviewed submitted documents and conducted focus groups regarding the initial standards, ARM 10.58.311 to 10.58.315.

The purpose of the review was to verify that the Institutional Report of the EPP meets the requirements of the Montana Professional Educator Preparation Program Standards (PEPPS) for both initial program and endorsement standards. The state report provides the results of the endorsement review relating to the program endorsement areas as outlined in [ARM 10.58](#):

- 10.58.311 Initial Content and Pedagogical Knowledge
- 10.58.312 Initial Clinical Partnerships and Practices
- 10.58.313 Initial Candidate Quality Recruitment, Progression, and Support
- 10.58.314 Initial Program Impact
- 10.58.315 Initial Provider Quality Assurance and Continuous Improvement
- 10.58.501 Teaching Standards
- 10.58.532 Elementary

The Final State Accreditation Program Report 2026 is attached.

The EPP may submit an optional rejoinder to the report concerning errors or omissions within 30 days after the report is received and before it is submitted to the BPE for action. This written response allows the EPP to state whether or not they agree with the evaluation team's findings; however, the EPP cannot include new and/or additional evidence with the rejoinder. The rejoinder should be submitted to Crystal Andrews at the OPI by June 19, 2026.

Below are the next steps and the projected timeline for the Board of Public Education (BPE) approval process.

- Stone Child College may submit a rejoinder to OPI by June 19, 2026.
- Upon the recommendation of the State Superintendent, the Final State Accreditation Program Report will be presented to the BPE as an information item at the July 2026 (tentative) BPE meeting.
- The BPE will take action on the Final State Accreditation Program Report and the Accreditation/Approval status of the EPP in the College of Education at Stone Child College at the September 2026 (tentative) BPE meeting.

For more information, contact Crystal Andrews by telephone at 406-593-8278 or by email at [Crystal.Andrews@mt.gov](mailto:Crystal.Andrews@mt.gov).

cc: Jamie Corley, Accreditation Specialist, Montana Office of Public Instruction  
Julie Murgel, Chief Program Officer, Montana Office of Public Instruction

## DEFINITIONS WHICH PERTAIN TO THIS REPORT

**Standard is met (Met):** Regular accreditation for a period of seven years.

**Standard is met with notation (Met with Notation):** Regular accreditation with minor deviations with most of the components of a standard met. This could involve incomplete items on the Institutional Report or clarification/corrections needed. As those items are rectified, the recommendation to the BPE will reflect the current and corrected status.

**Area for Improvement (AFI):** Standard is met with weakness. The site review team identified a weakness in the evidence for a standard or component. Area for Improvement should be remediated by the next accreditation cycle, and progress toward improvement is reported annually through the annual report to the OPI/BPE. During the next accreditation review, the EPP must demonstrate that the AFIs have been corrected. If the AFIs have not been corrected, a stipulation may be cited in the same area.

**Stipulation:** A standard or component is not met. The site visiting team identified a deficiency related to one or more components or the BPE standard. A stipulation is of sufficient severity that a standard may be determined to be unmet. A stipulation must be addressed within two years to retain accreditation.

### Initial Program Standards

| ARM       | TITLE                                                         | STATUS            |
|-----------|---------------------------------------------------------------|-------------------|
| 10.58.311 | Initial Content and Pedagogical Knowledge                     | Met with notation |
| 10.58.312 | Initial Clinical Partnerships and Practice                    | AFI               |
| 10.58.313 | Initial Candidate Quality, Recruitment, and Selectivity       | Met               |
| 10.58.314 | Initial Program Impact                                        | Stipulation       |
| 10.58.315 | Initial Provider Quality Assurance and Continuous Improvement | Stipulation       |

### Teaching Program Standards

| ARM       | TITLE                                   | STATUS            |
|-----------|-----------------------------------------|-------------------|
| 10.58.501 | <b>Teaching Standards</b><br>Elementary | Met with notation |
| 10.58.532 | <b>Elementary</b><br>Undergraduate      | Met with notation |

### OVERALL COMMENDATIONS

The Review Team evaluated the Stone Child College Teacher Education Program's institutional environment and candidate support systems. The program utilizes its small campus community to facilitate direct interaction between administration, faculty, and teacher candidates. Stakeholder feedback from current candidates, completers, faculty, employers, and community members indicates regular access to faculty guidance during coursework and clinical experiences. Interviews reflect that this structural model supports student retention and supports candidates during field placements.



**Stone Child College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.311 Initial Content and Pedagogical Knowledge**

**Summary of findings:** The evidence submitted indicates that the teacher education program has structured a system for developing, assessing, and evaluating candidate proficiency in content and pedagogical knowledge. While the system has been developed to align clinical evaluations, course syllabi, and handbooks, the implementation of the program is inconsistently applied in practice. Stone Child College has one undergraduate program which leads to licensure and endorsement. Overall, the evidence indicates gaps in candidate's development and application of content and pedagogical knowledge.

**Evidence consistent with meeting the standard:** Stone Child College's teacher preparation program partially aligns with ARM 10.58.311 standards. Evidence shows proficiency in Montana teaching standards (learner development/supportive environments) and demonstrates training in instructional strategies. The program culturally integrates the Cree Medicine Wheel into its framework.

**Evidence inconsistent with meeting the standard:** Based on evidence gathered for the accreditation of Stone Child College's teacher education program, the program is currently unable to demonstrate that all candidates meet the required standards for Initial Content and Pedagogical Knowledge (10.58.311). Evidence indicates significant deficiencies in core areas of practice and application. Specifically, evidence suggests that candidates consistently struggle with the utilization of educational technology and face challenges in implementing proactive classroom and behavior management strategies.

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:** To address deficiencies, Stone Child College's teacher education program should implement targeted, evidence-based improvements focused on integrating technology, structured classroom management, and continued measurement and evaluation of professional dispositions. Key recommendations include: 1) integrating active learning technology strategies to foster engagement and pedagogical skill; 2) implementing simulation-based classroom behavior management training to provide candidates with consistent, proactive discipline strategies; and 3) establishing a formal, reflective professional disposition portfolio system to foster ongoing development in professional dispositions. These actions align candidate training with modern, high-needs school environments, ensuring they are prepared to manage classrooms effectively and demonstrate professional disposition growth, directly addressing the identified weaknesses.

**Recommendation:** Met with notation

**Stone Child College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.312 Initial Clinical Partnerships and Practice**

**Summary of findings:** Stone Child College provided evidence in the form of handbooks, the initial conceptual framework, performance assessment plans along with the institutional report. Virtual interviews were conducted during the site visit. The resources described were used to evaluate the EPP's alignment to ARM 10.58.312 Initial Clinical Partnerships and Practice.

While conducting the interviews, it was noted that the EPP has experienced staffing changes in the past seven years. With the changes in program staff and leadership, there have been some inconsistencies between presented evidence and information gained from the interviews conducted during the site visit. It is believed the inconsistencies are a result of the changes needing to be made during staffing transitions but not all aspects of the requirements were implemented in a timely manner.

**Evidence consistent with meeting the standard:** Evidence presented supports that the EPP makes every effort to provide opportunities for candidates to student-teach in preferred districts. The EPP works closely with the site administrators to ensure a qualified cooperating teacher is available to provide mentorship and support. Candidates participate in community partnerships and supervised clinical practice.

**Evidence inconsistent with meeting the standard:** The program has a system in place to engage candidates in clinical partnerships and practice; however, minimal evidence supports the establishment of formalized, collaborative processes with community partners. The program lacks a documented system for gathering and utilizing feedback from local K-8 teachers regarding curriculum design. The program does not demonstrate a formalized structure for shared accountability of candidate outcomes. The program failed to provide evidence of ongoing, collaborative professional development initiatives for clinical educators that include both SCC faculty and P-12 personnel to gather feedback and make adjustments to ongoing improvements. The absence of a formal advisory panel that meets on a regular basis indicates that the program does not maintain the systematic, meaningful partnerships required to ensure high-quality clinical preparation, as outlined in 10.58.312.

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:** Stone Child College's Teacher Education Program must establish a formalized, documented system for 10.58.312 Initial Clinical Partnerships and Practice to address key deficiencies. Recommendations include establishing a formal advisory panel with regular, documented meetings, establishing a system to document teacher feedback on curriculum, creating shared accountability measures for candidate outcomes with

stakeholders, and implementing joint professional development with K-8 partners to strengthen clinical experiences.

**Recommendation:** Area for Improvement

**Stone Child College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard:** 10.58.313 Initial Candidate Quality, Recruitment, and Selectivity

**Summary of findings:** The standard is considered met based on evidence from a variety of components, indicating that candidates are supported from recruitment to program completion.

**Evidence consistent with meeting the standard:** The small-scale campus setting enables administration and faculty to collaborate closely with candidates, creating a nurturing, "family-like" culture that promotes both student success and retention. This commitment to tailored support extends into clinical teaching and the broader community, ensuring that candidates feel well-supported during their field experiences. This intimate organizational structure serves as a vital foundation for candidate growth, ultimately producing educators for the local community.

**Evidence inconsistent with meeting the standard:** To ensure compliance with the 10.58.313 (1)(g) standard of initial candidate quality, recruitment, and selectivity, the program should implement a documented process ensuring all candidates receive and acknowledge understanding of the complaint procedure. While the 2025 Student Handbook outlines general, high-level policies for students, there is an absence of concrete evidence showing that the Teacher Education program specifically informs candidates of a formalized, step-by-step, documented protocol for complaints regarding the program.

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:**

None

**Recommendation:** Met

**Stone Child College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.314 Initial Program Impact**

**Summary of findings:** Stone Child College teacher education program failed to provide sufficient evidence demonstrating a formalized, consistent process for assessing program impact. Specifically, the evidence lacked documented mechanisms detailing how the institution evaluates completer effectiveness in P-12 schools, stakeholder satisfaction, and how this data drives systematic program improvements.

**Evidence consistent with meeting the standard:** The program assesses how well completers are prepared for their professional responsibilities using data from graduate and employer surveys and case studies. While validated assessments are administered at program completion to document instructional capacity, the Completer Survey suffers from low participation, potentially impacting data validity and trend identification. No longitudinal evidence from case studies or employer surveys was provided.

**Evidence inconsistent with meeting the standard:** Based on the provided review, Stone Child College failed to meet standard 10.58.314 because it did not provide sufficient evidence of a formal, consistent process for assessing program impact. Interviews revealed that data collected was not verified through audits, representative of the full scope, shared with stakeholders, or actionable. The program did not demonstrate a consistent process for assessing program impact. Additionally, data is not accumulated over time to support longitudinal analysis and evidence is not used in actionable feedback loops to drive program improvements.

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:** Based on the review indicating failure to meet standard 10.58.314, Stone Child College must establish a formalized, reviewed, and longitudinally tracked program assessment system. Recommendations include creating documented data collection procedures, implementing stakeholder sharing protocols, and establishing an action-oriented feedback loop to ensure data drives improvements. To address the lack of a formal and consistent assessment process identified in the review, it is recommended that SCC establish and document a formalized system for evaluating program impact, complete with defined methodologies and schedules. Because interview evidence showed that existing data collection lacked sufficient scope and review, the college should initiate regular data verification assessments and expand collection methods to fully represent the program. Furthermore, to move beyond snapshot evaluations, SCC should continue utilizing Watermark to accumulate and analyze longitudinal data, allowing for the tracking and sharing of long-term trends. Finally, to ensure that data effectively drives program enhancements, a structured feedback loop must be developed to facilitate actionable improvements and the formal sharing of results with all stakeholders.

**Recommendation:** Stipulation

**Stone Child College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Initial Standards Narrative Report**

**Number and Name of Standard: 10.58.315 Initial Provider Quality Assurance and Continuous Improvement**

**Summary of findings: Evidence provided shows that** Stone Child College's teacher preparation program inconsistently meets the standards for a quality assurance and continuous improvement system. Based on the review of available documentation, evidence does not currently demonstrate that SCC's teacher education program meets the standards for a robust quality assurance and continuous improvement system. The findings suggest the program is in a transitional phase where a new system has been adopted, but not yet fully evidenced through longitudinal data.

**Evidence consistent with meeting the standard:** Stone Child College developed a comprehensive assessment system to guide P-12 student learning, monitor professional teacher dispositions, and evaluate clinical practice. However, the system is yet to be implemented. Submitted evidence included the Conceptual Framework, Assessment Plan, the Professional Actions and Critical Disposition assessment, Clinical I and Clinical II Evaluation Tools, and the Student Teaching Assessment.

**Evidence inconsistent with meeting the standard:** Stone Child College does not meet Standard 10.58.315, as it failed to provide evidence that its quality assurance program is relevant, verifiable, representative, and cumulative. While the college has formally adopted Watermark as its central quality assurance system, the transition is incomplete. Consequently, the institution lacks the data necessary to demonstrate the system's effectiveness or its impact on continuous improvement over time.

**Recommendations for New Areas for Improvement and/or Stipulations Including a Rationale for Each:** The Stone Child College Teacher Education Program's transition to Watermark highlights a gap between system adoption and the generation of mature, actionable data required by Montana Administrative Rule 10.58.315. To meet this standard, SCC must demonstrate that its quality assurance system is relevant, verifiable, representative, and cumulative. To address these inconsistencies, Stone Child College should focus on calibrating how specific Watermark data points align with every sub-standard of 10.58.315.

**Recommendation:** Stipulation



**Stone Child College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Number and Name of Standard: 10.58.501 Teaching Standards - Elementary**

**Validating Statement:** Alignment is evident with standards and available in course syllabi. Stronger evidence is required that indicates candidate performance for the program's critical assessments as it lacks disaggregated data and actionable analysis.

**Sources of Evidence:** Evidence gathered from general bulletin and catalog, course syllabi (including assessment descriptions and calendars), candidate clinical and student teaching expectations, and program-level alignment to the conceptual framework.

**Assessment Aligned to Standards:** Content topics in the assessments are consistent with the standards in ARM 10.58.501. This includes attention to core professional skills and knowledge regarding learners and their development, curricular concepts and tools of inquiry, professionalism in multiple contexts, and meaningful integration of Indian Education for All Essential Understandings.

Assessments address the range of knowledge, skill, and dispositions that are delineated in the standard and its respective substandards (as noted). This includes attention to:

- Learner growth and development, both as individuals and cultural contexts (a), (b), (g) and collaboratively work with others to do so (c) in EDU 220, EDU 235, EDU 301, EDU 309, EDU 311, EDU 335, EDU 337, EDU 340, EDU 380, EDU 480, EDU 490, HPE 285, and the Teacher Candidate Handbook.
- Supporting candidates by creating environments for learning and effectively assessing that learning across content areas (d), (e), (f), (h), including EDU 200, EDU 307, EDU 330, EDU 349, EDU 344, EDU 380, EDU 490, and the Teacher Candidate Handbook.
- Engagement in professionalism through a variety of settings and with various stakeholders (i), (j), (k), (l), including EDU 225, EDU 305, EDU 305, EDU 235, EDU 311, EDU 490 and the Teacher Candidate Handbook.

The assessments are congruent with the complexity, cognitive demands, and skill requirements described in the standards. For example, the Reflective Essay / Evidence assessments allow for responsiveness to course design and candidate progression while providing clear and consistent language. Communication skills are also assessed through

both interview and resume, supporting well-rounded attention to the demands of the profession.

Scoring guides are clear and the levels of candidate proficiency are distinct and appropriate. Clear common rubrics are included in student-facing documents and referred to consistently in course syllabi.

**Evaluation:** The required courses and aligned assessments provided in the IR meet the standards outlined in ARM 10.58.501 (a)-(l). However, to fully align with the standard, this area requires documentation showing how candidates apply skills in practice, rather than just covering them in theory.

**Commendations:** The teaching program demonstrates an intentional pedagogical progression and culturally responsive curriculum. A variety of assignments and expectations support candidates' creation of classroom learning, community integration, multimodal learning, and their reflection on themselves as learners as well as their impact of their choices on future learners.

**Improvements:** The evidence provided does not sufficiently indicate candidate performance for the program's critical assessments, as it lacks disaggregated data and actionable analysis. Documentation is insufficient to demonstrate candidate proficiency in providing effective instruction for English Language Learners (ELL) or the integration and application of educational technology in teaching. The program must produce evidence demonstrating how candidates use technology to support student learning and how they adapt instruction to support ELL students.

**Accreditation Recommendation:** Met with notation

**Stone Child College**  
**Educator Preparation Provider Accreditation Review**  
**Spring 2026**

**Narrative Report**

**Name and Number of Standard: 10.58.532 Elementary Education**

**Validating Statement:** Supporting materials were reviewed, including the Institutional Report, general bulletin and catalog, program matrices, course syllabi, assessment descriptions, and clinical experience documentation. Evidence reflects multiple required courses and field-based experiences demonstrating alignment to Administrative Rule of Montana (ARM) 10.58.532 for Elementary Education Program evidence was sufficient to demonstrate alignment across all substandards (a)–(p).

**Sources of Evidence:** Evidence gathered from general bulletin and catalog, course syllabi, assessment descriptions, candidate clinical and student teaching expectations, and program-level alignment documentation.

**Assessment Aligned to Standards:** The content topics addressed in the assessments are consistent with the Professional Educator Preparation Program Standards (PEPPS) outlined in ARM 10.58.532. Across coursework and clinical experiences, assessments require candidates to demonstrate content knowledge, pedagogical application, culturally responsive practices, and instructional decision making aligned to Montana Content Standards and Indian Education for All Essential Understandings.

Assessments collectively address the range of knowledge, skills, and dispositions delineated in the standards, including:

- Application of developmental theory through case studies, lesson planning, and reflections (EDU 220, EDU 309, EDU 340, EDU 490)
- Design and implementation of standards-aligned lessons across content areas (EDU 307, EDU 330, EDU 340, EDU 344, EDU 350, EDU 380, EDU 430, EDU 440, EDU 490)
- Differentiated instruction and support for diverse learners, including candidates with disabilities and culturally diverse populations (EDU 337, EDU 235, EDU 311, EDU 490)
- Use of formative and summative assessments to analyze student learning and adjust instruction (EDU 307, EDU 380, EDU 337, EDU 480, EDU 490)
- Integration of technology and current and emerging instructional tools (EDU 270, EDU 480, EDU 490)

The complexity, cognitive demands, and skill requirements of the assessments align with expectations for elementary teacher candidates. Candidates are required to plan, teach, assess, reflect, and revise instruction, demonstrating increasing levels of autonomy and professional judgment across the program.

Scoring guides and evaluation rubrics are present across clinical and methods courses and are structured to identify multiple levels of candidate proficiency. Rubrics distinguish between developing, proficient, and advanced performance and are appropriate for measuring progression toward program standards.

**Evaluation:** Required courses and aligned assessments provided in the Institutional Report meet the standards outlined in ARM 10.58.532 (a)–(p). Evidence supports alignment across content knowledge, pedagogy, assessment, differentiation, communication, classroom environment, and clinical practice.

**Commendation:** The Elementary Education program demonstrates a coherent system of coursework and clinical experiences that intentionally build candidate knowledge, application, and reflective practice across all domains of ARM 10.58.532. The strong integration of Indian Education for All, developmental theory, standards-aligned planning, and supervised clinical practice reflects a thoughtful approach to preparing candidates to meet the needs of Montana’s diverse K–12 students.

**Improvements:** Identified areas to strengthen include explicit elementary pedagogy language in selected arts courses (ART 110 and MUS 110), clarifying media arts inclusion within EDU 440, and adding explicit expectations in EDU 490 requiring demonstration of arts integration. Documentation could be enhanced by identifying a small number of signature assignments and providing sample artifacts to illustrate candidate performance for key standards. Reading courses could be significantly strengthened through a shift toward a brain-based approach to reading instruction using the Science of Reading and frameworks such as the Simple View of Reading, Scarborough’s Rope, the Four-part processor and Ehri’s phases of development.

**Accreditation Recommendation:** Met with notation

**ITEM 26**

**INFORMATION ON THE APPROVAL OF  
NEW CURRICULAR PROGRAM FOR  
SPECIAL EDUCATION AT THE  
UNIVERSITY OF MONTANA PHYLLIS J.  
WASHINGTON COLLEGE OF EDUCATION**

**Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Recommend Initial Approval of the University of Montana's Request to Implement: Special Education Standalone endorsement.                                                                                                                                                                                                                                          |
| <b>Presenter</b>             | Crystal Andrews                                                                                                                                                                                                                                                                                                                                                    |
| <b>Position Title</b>        | Senior Manager, School and Educator Effectiveness<br>Office of Public Instruction                                                                                                                                                                                                                                                                                  |
| <b>Overview</b>              | <p>The State Superintendent recommends initial approval of the University of Montana's request to implement a Standalone Special Education Endorsement.</p> <p>Program guidelines and timeline are included in the BPE Agenda Packet.</p> <p>University of Montana's Director of Accreditation, Kristi Steinberg, will provide an overview of the endorsement.</p> |
| <b>Requested Decision(s)</b> | Information Only                                                                                                                                                                                                                                                                                                                                                   |
| <b>Related Issue(s)</b>      |                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Recommendation(s)</b>     | N/A                                                                                                                                                                                                                                                                                                                                                                |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)



**APPROVAL OF NEW CURRICULAR PROGRAMS**  
**APPLICATION GUIDELINES**

**University of Montana**  
**Standalone Bachelor of Arts in Special Education**  
Administrative Rules of Montana 10.58.802

| Step 1: Initial Approval                                                                                                                                | Date Submitted |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Educator Preparation Provider (EPP) curriculum process and procedures.                                                                                  | December 2025  |
| Institutional body implements policy to add new programs.                                                                                               | December 2025  |
| Institutional governing body, i.e., board of directors, institutional leadership, or Board of Regents, as applicable, approves new program application. | December 2025  |
| Verification of regional accreditation.                                                                                                                 | December 2025  |

| Step 2: Application Process                                                                                                                                                                                                                                                                      | Date Submitted     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| EPP completes the Institutional Self-Study Report (ISSR) to address Administrative Rules of Montana (ARM)10.58.802 Approval of New Curricular Programs.                                                                                                                                          | January-April 2026 |
| EPP completes sections of the ISSR unit standards addressing how the new curricular program is aligned with ARM 10.58.311 – 315                                                                                                                                                                  | January-April 2026 |
| EPP completes sections of the ISSR: ARM 10.58.501 Teaching Standards for endorsement subject areas; and specific sections of ARM related to the new program.                                                                                                                                     | January-April 2026 |
| EPP provides support material and resources as needed to respond to the Specific ISSR Sections – use electronic links as applicable, e.g., online Web links containing additional resources and support material, catalogs, programs of studies, assessment system information, surveys of need. | January-April 2026 |

| Step 3: Application Submission                        | Date Submitted |
|-------------------------------------------------------|----------------|
| EPP submits completed ISSR electronically to the OPI. | April 18, 2026 |



| Step 4: Office Audit/Review                                                                                | Date Submitted |
|------------------------------------------------------------------------------------------------------------|----------------|
| OPI conducts the audit/review of the application materials.                                                | June 2026      |
| OPI provides an electronic report to EPP with comments and specific requests for additional documentation. | July 2026      |
| EPP submits a follow-up report to OPI, as necessary.                                                       | N/A            |

| Step 5: Site Visit                                                                                                                                                                        | Date Submitted |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| If the EPP is scheduled for a regular site review, the new program is included in the regular review.                                                                                     | Spring 2028    |
| If the EPP is not scheduled for a regular review within the next two years, the OPI will conduct a site review to verify the ISSR of the new curricular program meets the PEPP Standards. | N/A            |
| OPI facilitates the site review to verify the ISSR meets the PEPP Standards of the new program.                                                                                           | Spring 2028    |
| Site Visits follow the approved state protocol based on the PEPP Standards.                                                                                                               | Spring 2028    |

| Step 6: Final Approval Process                                                                                                                                        | Date Submitted |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Site visitor team submits the state exit report to the state superintendent.                                                                                          | May 2028       |
| State Superintendent of Public Instruction makes recommendation to approve/disapprove the proposed new curricular program to the BPE based upon the site team report. | July 2028      |
| BPE takes final action on the Superintendent's recommendation.                                                                                                        | September 2028 |

## **Bachelor of Arts in Special Education**

### **Proposal Summary and Overview**

- In contrast to other special education endorsement programs, this pathway leads to a bachelor's degree and standalone licensure in special education and is not added to a general education teaching area.
- After completing the first two years of general education coursework, students progress through a four-semester sequence of education courses and immersive clinical experiences culminating in a capstone special education-specific student teaching experience.
- Students in this program can participate in Montana Teacher Residency, with the possibility to work within Apprenticeship frameworks in the future.
- 2+2 articulation agreements are currently underway with five Montana community colleges.
- The program can be completed from anywhere with no time required on the UM campus. The required courses are currently scheduled in online and distance-based modalities.

#### **Rationale**

While the UM Department of Teaching and Learning currently offers endorsements in special education at the undergraduate and graduate level, the current requirement to add this to a general education licensure area makes this an extensive program of study and does not offer the level of flexibility desired by many aspiring special educators.

We seek to offer a high-quality, clinically-based, standalone special education licensure at the undergraduate level to help mediate well-documented teacher shortages across the state. This will also offer options for those in Montana's current para pathways and Class 9 special education technician licensure initiatives to continue their education in a flexible way.

Throughout conversations with stakeholders, several themes emerged:

- **Content Knowledge:** Standalone special education licensure still requires a general understanding of the content taught by general education teachers, including specific needs in the areas of math and reading/language arts. This BA pathway provides flexibility for students completing AA and general education requirements, while still aligning to P-12 classroom needs.
- **Pedagogy-related Need Areas:** Beyond what was already required in the special education endorsement program of study, this standalone BA focuses on pedagogy in the teaching of reading and literacy (9 credits) and math (6 credits).
- **Mentorship:** The program includes mentored clinical experiences directly connected to course content.

- Scope of Coursework for Diverse Learners: As a non-categorical licensure field in Montana, the program of study includes specific focuses on early childhood, high school-to-community transitions, the inclusion of gifted education, and low-incidence disabilities.

| Special Education P-12 Major Course Requirements                                                     |                                                                                                                                                                                                                                                                                                                          |                        |                            |      |       |
|------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|----------------------------|------|-------|
| Course                                                                                               | General Education /Content /Specialty Courses                                                                                                                                                                                                                                                                            | Pre-Req.               | Credits                    | Term | Grade |
| M 132                                                                                                | Numbers & Ops for K-8 Teachers                                                                                                                                                                                                                                                                                           | M 095 or placement     | 3                          |      |       |
| M 133                                                                                                | Geometry & Measurement for K-8 Teachers                                                                                                                                                                                                                                                                                  | M 132                  | 3                          |      |       |
| M 234                                                                                                | Higher Math for K-8 Teachers                                                                                                                                                                                                                                                                                             | M 132                  | 3                          |      |       |
| HSTA 101H<br>HSTA 102H<br>HSTR 101H<br>HSTR 102H<br>GPHY 121S<br>GPHY 141S<br>PSCI 210S<br>PSCI 220S | American History I (Select one course from this box.)<br>American History II<br>Western Civilization I<br>Western Civilization II<br>Introduction to Human Geography<br>World Regional Geography<br>Intro to American Gov't<br>Intro to Comparative Government                                                           |                        | 3-4                        |      |       |
| HSTA 255                                                                                             | Montana History (fall only)                                                                                                                                                                                                                                                                                              |                        | 3                          |      |       |
| NASX 105H                                                                                            | Native American Studies                                                                                                                                                                                                                                                                                                  |                        | 3                          |      |       |
| EDU 362                                                                                              | K-8 Health Enhancement & Well-being                                                                                                                                                                                                                                                                                      |                        | 3                          |      |       |
| EDU 222                                                                                              | Educational Psychology and Child Development                                                                                                                                                                                                                                                                             |                        | 3                          |      |       |
| EDU 331                                                                                              | Literature and Literacy for Children                                                                                                                                                                                                                                                                                     | WRIT 101 or equivalent | 3                          |      |       |
| Admission to the Teacher Education Program is required to enroll in the courses listed below.        |                                                                                                                                                                                                                                                                                                                          |                        |                            |      |       |
| EDU 395<br>EDU 397<br>EDU 397<br>EDU 340<br>EDSP 462                                                 | LEVEL 1* (13 credits)<br>Clinical Experience: Level 1<br>Methods: PK-4: Early Numeracy<br>Methods: PK-3: Early Literacy<br>Classroom Management<br>Special Education Law, Policy, and Practice                                                                                                                           |                        | 1<br>3<br>3<br>3<br>3      |      |       |
| EDSP 395<br>EDEC 408<br>EDU 438<br>EDU 497<br>EDSP 426<br>EDSP 461                                   | LEVEL 2* Spring only (16 credits)<br>Clinical Experience: Special Education<br>Early Childhood Principles and Practices<br>Literacy Diagnosis, Assessment, and Instruction (pre-req EDU 397 Literacy)<br>Methods: 5-8 Mathematics<br>Introduction to Transitions and Community Supports<br>Positive Behavior Supports    |                        | 1<br>3<br>3<br>3<br>3<br>3 |      |       |
| EDU 395<br>EDU 339<br>EDU 461<br>EDSP 405<br>EDSP 456<br>EDU 407E                                    | LEVEL 3* Autumn only (13-16 credits)<br>Clinical Experience: Level 3<br>Methods: PK-8 Language Arts<br>Intro to Gifted Education<br>Assessment for Students with Exceptionalities<br>Intro to Methods for Low Incidence Disabilities<br>Ethics and Policy Issues (may be taken in a different semester or in the summer) |                        | 1<br>3<br>3<br>3<br>3<br>3 |      |       |
| EDSP 495<br>EDSP 454<br>EDU 494                                                                      | LEVEL 4 Student Teaching* (15 credits)<br>Student Teaching: Special Education<br>Advanced Academic Interventions<br>Seminar                                                                                                                                                                                              |                        | 11<br>3<br>1               |      |       |

**ITEM 27**

**ACTION ON THE PROPOSED NOTICE OF  
ADOPTION PERTAINING TO  
RULEMAKING IN ARM TITLE 10, CHAPTER  
57, EDUCATOR LICENSURE STANDARDS –  
DUAL CREDIT POSTSECONDARY  
FACULTY LICENSE AND AUTHORIZE  
FILING OF THE NOTICE WITH THE  
SECRETARY OF STATE FOR  
PUBLICATION IN THE MONTANA  
ADMINISTRATIVE REGISTER**

**Dr. Ron Slinger**



**MONTANA  
ADMINISTRATIVE  
REGISTER**



**BOARD OF PUBLIC EDUCATION**

---

**NOTICE OF ADOPTION**

**MAR NOTICE NO. 2026-103.2**

**Summary**

Adoption of NEW RULE 1 (10.57.223), amendment of ARM 10.57.102, and repeal of ARM 10.57.437 and 10.57.438 pertaining to Class 8 Licensure in the Educator Licensure Standards

**Previous Notice(s) and Hearing Information**

On June 5, 2026, the board published MAR Notice No. 2026-103.1 pertaining to the public hearing on the proposed adoption, amendment, and repeal of the above-stated rule in Issue Number 11 of the 2026 Montana Administrative Register. On June 29, 2026, the board held a public hearing to consider the proposed rulemaking.

---

**Final Rulemaking Action – Effective August 8, 2026**

**ADOPT AS PROPOSED**

The agency has adopted the following rules as proposed:

**10.57.223 NEW RULE I DUAL CREDIT FACULTY LICENSE EXCEPTION**

**AMEND AS PROPOSED**

The agency has amended the following rules as proposed:

**10.57.102 DEFINITIONS**

**REPEAL AS PROPOSED**

The agency has repealed the following rules as proposed:

**10.57.437 CLASS 8 DUAL CREDIT POSTSECONDARY FACULTY LICENSE**

**10.57.438 CLASS 8 DUAL CREDIT POSTSECONDARY FACULTY LICENSE ENDORSEMENTS**

---

**Statement of Reasons**

No comments were received.

---

**Contact**

McCall Flynn  
(406) 444-6576  
bpe@mt.gov

---

**Rule Reviewer**

McCall Flynn

**Approval**

Dr. Tim Tharp  
Board Chair

❖ **ASSESSMENT COMMITTEE – (Items 28-29)**

**Renee Rasmussen**

**ITEM 28**

**INFORMATION AND DISCUSSION ON  
STATEWIDE ASSESSMENT THINK TANK**

**Dr. Julie Murgel  
Marie Judisch**



# Montana Board of Public Education

## Executive Summary

**Date:** July 22-24, 2026

|                              |                                                                                                                                                                                                                                     |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Information on the Assessment Task Force                                                                                                                                                                                            |
| <b>Presenter</b>             | Julie Murgel Tyler Capece                                                                                                                                                                                                           |
| <b>Position Title</b>        | Chief Program Officer<br>Assistant Deputy Superintendent<br>Office of Public Instruction                                                                                                                                            |
| <b>Overview</b>              | Presentation on Assessment Task Force <ul style="list-style-type: none"><li>• Purpose, deliverables, objectives, timeframe</li><li>• Membership</li><li>• Structure and governance</li><li>• Communication and engagement</li></ul> |
| <b>Requested Decision(s)</b> | Information Item                                                                                                                                                                                                                    |
| <b>Related Issue(s)</b>      | ARM 10.56 Student Assessment                                                                                                                                                                                                        |
| <b>Recommendation(s)</b>     | n/a                                                                                                                                                                                                                                 |





## **Assessment Taskforce Update**

**Taskforce Purpose:** On June 22, 2026, BPE conditionally approved the Superintendent's recommended modifications to the system of statewide assessment for math and ELA (MAST). The BPE has asked the OPI, in consultation with the Board, to create a taskforce comprised of testing experts, educators, and appropriate stakeholders to refine the assessment to better achieve the following purposes:

- (1) make instructional usefulness a primary measure of success, improving classroom instruction and student outcomes;
- (2) boost the efficacy of score reports and the reporting process;
- (3) limit testing burdens and enhance structured feedback routines;
- (4) expand opportunities for professional development focused on instructional use; and
- (5) build educator trust in the data.

### **Expected Deliverables:**

- Recommendations for refining the MAST assessment.
- A strategic plan to improve instructional usefulness and score reporting efficacy.
- Guidelines for reducing testing burdens, enhancing student feedback routines, and building parental engagement.
- A professional development framework centered on instructional utility and coherence.

### **Objectives:**

- Make instructional usefulness a primary measure of success to improve classroom instruction and student outcomes.
- Boost the efficacy of score reports and the reporting process.
- Limit testing burdens, enhance structured feedback routines, and build parental engagement strategies.
- Expand opportunities for professional development focused on instructional coherence.
- Build educator trust in the data.

**Timeframe:** August 2026 to December 2026

**Taskforce Membership:**

A group of 15–20 members will be chosen based on their credibility, specialized expertise, and problem-solving capabilities. To align work across existing MAST working groups, representatives from the MAST Teacher Leader Cohort and MAST Assessment Implementation Committee (AIC) will also serve on the taskforce. The taskforce will consist of diverse representatives from all impacted stakeholder groups, including:

- Educators (grades 3–8), instructional coaches, and test coordinators
- School and district leadership, including principals and superintendents
- Assessment, curriculum, and instructional experts
- Students, parents, and caregivers

Furthermore, OPI leadership and specialists will be integrated into the taskforce, specifically the Assistant Deputy, the Chief Program Officer, the Assessment Director, and the Senior Manager for Academic Outcomes and Instruction.

**Taskforce Authority**

The taskforce is authorized to develop and propose recommendations that are both fiscally viable and technically sound for the Superintendent of Public Instruction's consideration. All proposed recommendations are required to align with the five established BPE key areas.

**Leadership and Organizational Structure**

To maintain project momentum and ensure stable leadership, a dedicated facilitator will be appointed to manage the taskforce. This facilitator will serve as the primary point of contact and will collaborate closely with Julie Murgel, Chief Program Officer, and Tyler Capece, Assistant Deputy, to establish agendas, oversee subcommittees, and address any internal conflicts.

**Strategic Communication and Engagement**

The taskforce will prioritize transparency and trust-building through a consistent meeting schedule and clearly defined protocols for reaching consensus or documenting dissent. Decision-making will be supported by integrated feedback loops with broader stakeholder groups. To ensure public accessibility, all taskforce agendas and meeting notes will be hosted on the official OPI website.

**Resource and Time Management**

To maximize participation and minimize disruption to the school day, taskforce activities will be conducted virtually and scheduled outside of standard classroom instructional hours. Taskforce membership is voluntary.

## **ITEM 29**

# **ACTION AND INFORMATION ON THE APPLICATION AND CRITERIA FOR THE LIST OF APPROVED EARLY NUMERACY SCREENING TOOLS**

**McCall Flynn**



## Board of Public Education List of Approved Screening Tools Numeracy Criteria

**Purpose:** According to ARM [10.54.903](#), the Board of Public Education must review the list of approved evaluation methodology screening tools in odd years to ensure continuous adherence to developmentally appropriate and research-based screening tool requirements. This document is for application to the List of Approved Evaluation Methodology Numeracy Screening Tools.

**Name of Assessment:**

**Date of Application:**

**Name of Applicant:**

**Name of Reviewer:**

1. The evaluation methodology denotes the instrument or assessment used to determine if the child is above, at, or below a developmental trajectory leading to math proficiency upon completion of 3rd grade and may address one or all of the following domains. **Please check the boxes denoting which of the following criteria are addressed in the assessment and provide links to supporting documents for reviewers** (check all that apply).

- ☐ Number Naming
- ☐ One-to-One Correspondence
- ☐ Oral Counting
- ☐ Quantity Comparison
- ☐ Cardinality
- ☐ Number Order
- ☐ Strategic Counting
- ☐ Numeral Identification
- ☐ Subitizing
- ☐ Number Comparison
- ☐ Addition and Subtraction
- ☐ Problems in Context (Word Problems)
- ☐ Math Composite Score

2. Is this evaluation methodology a/an (check all that apply):

- ☐ Early Numeracy Screener
  - ☐ Computer-Based
- ☐ Number Sense Interview
  - ☐ Computer-Based
- ☐ Criterion-Referenced Scoring
- ☐ Norm-Referenced Scoring

| Attributes                                                                                                                                                         | Minimal Evidence | Moderate Evidence | Strong Evidence |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|-------------------|-----------------|
| Is the assessment developmentally appropriate?<br>(appropriateness of the constructs/content measured by the instrument for determining risk of math difficulties) |                  |                   |                 |
| Is the assessment research-based?<br>(clear and compelling theoretical framework and evidence through the age and grade range specified)                           |                  |                   |                 |
| Does the assessment demonstrate classification accuracy (sensitivity and specificity) for math performance?<br>(.70 or higher)                                     |                  |                   |                 |
| Does the assessment demonstrate predictive validity for math performance?<br>(.60 or higher)                                                                       |                  |                   |                 |
| Does the assessment demonstrate reliability for math performance?<br>(.70 or higher)                                                                               |                  |                   |                 |
| Is the assessment available for use across 3.5 years of age through age 9 (third grade)?                                                                           |                  |                   |                 |
| Has a normative update of the assessment been published within the last 5 years?                                                                                   |                  |                   |                 |
| Is the assessment clearly described as a “screener”?                                                                                                               |                  |                   |                 |
| Is the assessment clearly described as an efficient protocol with an administration time of 20 minutes or less?                                                    |                  |                   |                 |
| Is the assessment aligned with formative assessments?                                                                                                              |                  |                   |                 |
| Can the assessment be given in English and Spanish?                                                                                                                |                  |                   |                 |

**Recommendation:**



## Board of Public Education List of Approved Screening Tools Numeracy Application

**Purpose:** According to ARM [10.54.903](#), the Board of Public Education must review the list of approved evaluation methodology screening tools in odd years to ensure continuous adherence to developmentally appropriate and research-based screening tool requirements. This document is for application to the List of Approved Evaluation Methodology Numeracy Screening Tools.

**Submission Procedures:** Applications must be received by the Board of Public Education at [bpe@mt.gov](mailto:bpe@mt.gov) between December 1 and January 1 at 5PM. The Board will take action on the applications and recommendations at the following March Board meeting.

**Name of Assessment:**

**Date of Application:**

**Name of Applicant:**

1. The evaluation methodology denotes the instrument or assessment used to determine if the child is above, at, or below a developmental trajectory leading to math proficiency upon completion of 3rd grade and may address one or all of the following domains. **Please check the boxes to indicate which domain(s) are assessed in the instrument(s) and provide links to supporting documents for reviewers** (check all that apply).

- ☐ Number Naming
- ☐ One-to-One Correspondence
- ☐ Oral Counting
- ☐ Quantity Comparison
- ☐ Cardinality
- ☐ Number Order
- ☐ Strategic Counting
- ☐ Numeral Identification
- ☐ Subitizing
- ☐ Number Comparison
- ☐ Addition and Subtraction
- ☐ Problems in Context
- ☐ Math Composite

2. Is this evaluation methodology a/an (check all that apply):

- ☐ Early Numeracy Screener
  - ☐ Computer-Based
- ☐ Number Sense Interview
  - ☐ Computer-Based
- ☐ Criterion-Referenced Scoring
- ☐ Norm-Referenced Scoring

**Please provide evidence to support responses to the following questions.**

3. Is the assessment developmentally appropriate?
4. Is the assessment research-based?
5. Does the assessment demonstrate classification accuracy (sensitivity and specificity) for math performance? (.70 or higher)
6. Does the assessment demonstrate predictive validity for math performance? (.60 or higher)
7. Does the assessment demonstrate reliability for math performance? (.70 or higher)
8. Is the assessment available for use across 3.5 years of age through age 9 (third grade)?
9. Has a normative update of the assessment been published within the last 5 years?
10. Is the assessment clearly described as a “screener”?
11. Is the assessment clearly described as an efficient protocol with an administration time of 20 minutes or less?
12. Is the assessment aligned with formative assessments?
13. Can the assessment be given in English and Spanish?
14. Under [20-7-1803](#), MCA, the evaluation must be cost-effective. What is the average per year cost, and please describe how you determine these rates.



**\*\*\*\*\*TIME CERTAIN AT 1:00 PM\*\*\*\*\***

**❖ ACCREDITATION COMMITTEE – (Items 30-36)**

**Dr. Hannah Neiskens**

**ITEM 30**

**INFORMATION ON FINANCIAL LITERACY  
AND ECONOMICS AS A GRADUATION  
REQUIREMENT**

**Dr. Carly Urban, Montana State University**

**Mike Paffhausen, NAIFA**

**Dr. Julie Murgel**

# Montana Board of Public Education

## Executive Summary

**Date:** July 22-24, 2026

|                              |                                                                                                                                                                                                                                         |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Update on Financial Literacy Graduation Requirement                                                                                                                                                                                     |
| <b>Presenter</b>             | Julie Murgel<br>Shannon Boswell                                                                                                                                                                                                         |
| <b>Position Title</b>        | Chief Program Officer<br>CTAE Director<br>Office of Public Instruction                                                                                                                                                                  |
| <b>Overview</b>              | Presentation on Status of Financial Literacy Graduation Requirement Implementation <ul style="list-style-type: none"><li>• Overview</li><li>• Examples</li><li>• Course Codes</li><li>• Course Enrollment</li><li>• Resources</li></ul> |
| <b>Requested Decision(s)</b> | Information Item                                                                                                                                                                                                                        |
| <b>Related Issue(s)</b>      | 10.55.904 and 10.55.905                                                                                                                                                                                                                 |
| <b>Recommendation(s)</b>     | n/a                                                                                                                                                                                                                                     |





## Financial Literacy and Economic Graduation Requirement Update

### Overview

Montana requires all high school students to earn **at least 1/2 credit in economics or personal finance to graduate**. This mandate applies to all graduating classes starting with the **Class of 2026**.

### **10.55.905 GRADUATION REQUIREMENTS**

(1) As a minimum, a school district's requirements for **graduation shall include a total of 20 units of study** that enable all students to meet the content standards and content-specific grade-level or grade-band learning progressions. Students may demonstrate achievement through a flexible system of pupil-centered learning.

(2) In order for students to graduate, they must meet the content and performance standards. The following 13 units shall be part of the 20 units. The required units may be satisfied by an equivalent course that meets the district's curriculum and assessment requirements, which are aligned with each of the content standards:

- (a) 4 units of English language arts;
- (b) 2 units of mathematics;
- (c) 2 units of social studies (including a 1/2 unit of Civics or Government);
- (d) 2 units of science;
- (e) 1 unit of health and physical education;
- (f) 1 unit of arts;
- (g) 1 unit of career and technical education; and
- (h) 1/2 unit of economics or financial literacy within the 2 units of social studies, the 2 units of mathematics, or the 1 unit of career and technical education.**

The financial literacy requirement is designed to be **highly flexible**. To ensure it fits into various school curriculums and student schedules, the 1/2 credit can be fulfilled by taking a class classified under:

- Social Studies
- Mathematics
- Career and Technical Education (CTE) (e.g., Business, Agriculture, or Family and Consumer Sciences)

The state sets the minimum 20-unit standard for graduation, **but local school boards determine which specific courses or combinations are offered to satisfy this 1/2 credit in a district.**

### Examples:

**Butte School District:** Instead of forcing students into a single standalone class, the Butte School District allows students to fulfill this half-credit requirement by passing one of the following courses: Managing Money / Financial Literacy (a dedicated personal finance course), Consumer Math, Practical Math, Family Life, 3+1+3 Intro to Business (a dual-credit option).

**Fairview School District:** As a small rural school district on the Montana-North Dakota border, Fairview Public Schools offers flexibility in how students can satisfy this mandate:

- CTE Integration: Students can earn the credit through Career and Technical Education (CTE) pathways, including Agriculture and Business electives that feature state-approved financial modules.
- Dedicated Electives: Taking a traditional, dedicated semester of Personal Finance or Economics.
- Distance & Digital Learning: For students with rigid scheduling conflicts, the district can approve online distance learning programs (such as Montana Digital Academy) that offer vetted financial literacy coursework.

The course material focuses on real-world capabilities, including tracking personal expenses, understanding employment taxes, managing and savings accounts, navigating credit card risks, and learning the basics of long-term investing.

**Glasgow School District:** Glasgow High School holds a "Gold Standard" designation for financial literacy. Led by the [Glasgow Public Schools](#) business department, the school is committed to ensuring 100% of its students complete a dedicated, standalone personal finance class. It is recommended that students take the financial literacy course in the 9<sup>th</sup> or 10<sup>th</sup> grade.

The curriculum focuses strictly on real-world financial topics, including:

- Designing personal household budgets

- Managing checking, savings, and debit accounts
- Understanding consumer credit and interest rates
- Evaluating insurance and navigating personal taxes

**Hamilton School District:** At Hamilton High School, all students must complete 0.5 credits of Personal Finance & Development to graduate. Hamilton was an early adopter of financial education in Montana, utilizing a dedicated course structure rather than just blending the topics into existing history or math classes. The curriculum focus is designed to build real-world proficiency in consumer decision-making, navigating the stock market, tracking personal budgeting, and understanding insurance protections needed later in life.

**Jordan School District:** Jordan High School targets one course designed specifically for upperclassmen in the 11th and 12th grades. Jordan HS handbook states that this stage ensures the material is highly relevant as students prepare to enter adulthood, college, or the workforce. The class prepares students for the choices and challenges of modern financial markets. Instruction specifically focuses on six core practical areas:

- Income: Understanding wages, pay structures, and employment benefits.
- Money Management: Mastering day-to-day cash flow and banking.
- Spending and Credit: Creating budgets and managing consumer credit scores.
- Saving and Investing: Building wealth and navigating long-term investments.
- Consumer Protection: Identifying fraud, scams, and consumer rights.
- Risk Management: Evaluating insurance options and minimizing personal liability.

## Financial Literacy Course Codes



### Financial Literacy and Economics Courses

Montana financial literacy and economics courses are a subset of NCES (National Center for Education Statistics) standard codes. Along with the course code, a content description for each course is provided where financial literacy and/or economics is embedded within the course.

#### Mathematics

| Course Code | Course Name          | Endorsements             | Course Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------|----------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 02154       | Business Mathematics | 02S MAT, 12S BUS, 12S BM | Business Mathematics courses reinforce general mathematics skills, emphasize speed and accuracy in computations, and use these skills in a variety of business applications. Business Mathematics courses reinforce general mathematics topics (e.g., arithmetic, measurement, statistics, ratio and proportion, exponents, formulas, and simple equations) by applying these skills to business problems and situations. Applications might include wages, hourly rates, payroll deductions, sales, receipts, accounts payable and receivable, financial reports, discounts, and interest. |
| 02157       | Consumer Mathematics | 02S MAT, 12S BUS, 12S BM | Consumer Mathematics courses reinforce general mathematics topics (such as arithmetic using rational numbers, measurement, ratio and proportion, and basic statistics) and apply these skills to consumer problems and situations. Applications typically include budgeting, taxation, credit, banking services, insurance, buying and selling products and services, home and/or car ownership and rental, managing personal income, and investment.                                                                                                                                       |
| 02159       | Financial Algebra    | 02S MAT                  | Financial Algebra courses build a conceptual understanding of algebraic and geometric representations of Financial Mathematics. These courses apply these skills to practical consumer scenarios, encompassing budgeting, taxation, credit, banking services, insurance, buying and selling, home and car ownership, personal income management, and investment. Through real-world applications, students gain a comprehensive understanding of mathematics as a tool for addressing consumer-related challenges and decision-making.                                                      |

#### Social Sciences and History

| Course Code | Course Name           | Endorsements                     | Course Description                                                                                                                                                                                                                                                                                                                                                                     |
|-------------|-----------------------|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 04201       | Economics             | 04S BF, 04S ECO, 12S BUS, 12S BM | Economics courses provide students with an overview of economics with primary emphasis on the principles of microeconomics and the U.S. economic system. These courses may also cover topics such as principles of macroeconomics, international economics, and comparative economics. Economic principles may be presented in formal theoretical contexts, applied contexts, or both. |
| 04202       | Comparative Economics | 04S BF, 04S ECO, 12S BUS, 12S BM | Comparative Economics courses offer students an opportunity to study different economies and economic systems, including an examination of various approaches to problems in micro- and macroeconomics.                                                                                                                                                                                |

| 04203                                 | AP Microeconomics          | 04S BF, 04S ECO,12S BUS, 12S BM | Following the College Board's suggested curriculum designed to parallel college-level microeconomics, AP Microeconomics courses provide students with a thorough understanding of the principles of economics that apply to the functions of individual decision makers (both consumers and producers). They place primary emphasis on the nature and functions of product markets, while also including a study of factor markets and the role of government in the economy.                                                                                                                                                      |
|---------------------------------------|----------------------------|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 04204                                 | AP Macroeconomics          | 04S BF, 04S ECO,12S BUS, 12S BM | Following the College Board's suggested curriculum designed to parallel college-level macroeconomics, AP Macroeconomics courses provide students with a thorough understanding of the principles of economics that apply to an economic system as a whole. They place particular emphasis on the study of national income and price determination and developing students' familiarity with economic performance measures, economic growth, and international economics.                                                                                                                                                           |
| 04205                                 | AP Economics               | 04S BF, 04S ECO,12S BUS, 12S BM | AP Economics courses prepare students for the College Board's examinations in both Microeconomics and Macroeconomics; these courses include the content of the two separate courses as described above.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 04206                                 | IB Economics               | 04S BF, 04S ECO,12S BUS, 12S BM | IB Economics courses prepare students to take the International Baccalaureate Economics exams. The courses provide students with the basic tools of economic reasoning and teach them to use those tools to explain or interpret economic problems. Course content includes international and development economics, microeconomics, and macroeconomics.                                                                                                                                                                                                                                                                           |
| <b>Career and Technical Education</b> |                            |                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Business and Marketing</b>         |                            |                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Course Code</b>                    | <b>Course Name</b>         | <b>Endorsements</b>             | <b>Course Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 12052                                 | Business Management        | 12S BUS, 12S BM                 | Business Management courses acquaint students with management opportunities and effective human relations. These courses provide students with the skills to perform planning, staffing, financing, and controlling functions within a business. In addition, they usually provide a macro-level study of the business world, including business structure and finance, and the interconnections among industry, government, and the global economy. The course may also emphasize problem-based, real-world applications of business concepts and use accounting concepts to formulate, analyze, and evaluate business decisions. |
| 12053                                 | Entrepreneurship           | 12S BUS, 23S FCS, 12S BM        | Entrepreneurship courses acquaint students with the knowledge and skills necessary to own and operate their own businesses. Topics from several fields typically form the course content: economics, marketing principles, human relations and psychology, business and labor law, legal rights and responsibilities of ownership, business and financial planning, finance and accounting, and communication. Several topics surveyed in Business Management courses may also be included.                                                                                                                                        |
| 12059                                 | IB Business and Management | 12S BUS, 12S BM                 | IB Business Management courses prepare students to take the International Baccalaureate Business and Management exams. IB Business Management courses explore business decision-making processes and their relationship to internal and external environments. Course content includes business organization and environment, human resources, accounts and finance, marketing, and operations management.                                                                                                                                                                                                                         |
| 12101                                 | Banking and Finance        | 12S BUS, 12S BM                 | Banking and Finance courses provide students with an overview of the American monetary and banking system as well as types of financial institutions and the services and products that they offer. Course content may include government regulations; checking, savings, and money market accounts; loans; investments; and negotiable instruments.                                                                                                                                                                                                                                                                               |

|                                                 |                               |                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------------------|-------------------------------|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 12102                                           | Banking                       | 12S BUS, 12S BM          | Banking courses are similar to Banking and Finance courses, but they focus specifically on banking. These courses may also address examining and applying the methods used for measuring the financial performance of banks in addition to examining specialized brokerage products, current issues, and future trends in banking.                                                                                                                                                                                                                                                                                                        |
| 12103                                           | Finance                       | 12S BUS, 12S BM          | Finance courses are similar to Banking and Finance courses, but they focus specifically on finance, addressing how businesses raise, distribute, and use financial resources while managing risk. Course content typically involves modeling financial decisions (such as borrowing, selling equity or stock, lending or investing) typically undertaken by businesses.                                                                                                                                                                                                                                                                   |
| 12104                                           | Accounting                    | 12S BUS, 12S BM          | Accounting courses introduce and expand upon the fundamental accounting principles and procedures used in businesses. Course content typically includes the full accounting cycle, payroll, taxes, debts, depreciation, ledger and journal techniques, and periodic adjustments. Students may learn how to apply standard auditing principles and to prepare budgets and final reports. Calculators, electronic spreadsheets, or other automated tools are usually used. Advanced topics may include elementary principles of partnership and corporate accounting and the managerial uses of control systems and the accounting process. |
| 12105                                           | Business Economics            | 12S BUS, 12S BM          | Business Economics courses integrate economic principles (such as free market economy, consumerism, and the role of American government within the economic system) with entrepreneurship/business concepts (such as marketing principles, business law, and risk).                                                                                                                                                                                                                                                                                                                                                                       |
| 12106                                           | Risk Management and Insurance | 12S BUS, 12S BM          | Risk Management and Insurance courses analyze risk management techniques from the viewpoints of those employed in the industry as well as of business owners seeking to meet risk management needs. Insurance products are evaluated in relation to cost and effectiveness.                                                                                                                                                                                                                                                                                                                                                               |
| 12107                                           | Securities and Investments    | 12S BUS, 12S BM          | Formerly known as Investing, Securities and Investments courses emphasize the formulation of business and individual investment decisions by comparing and contrasting the investment qualities of cash, stock, bonds, and mutual funds. Students typically review annual reports, predict growth rates, and analyze trends. Stock market simulations are often incorporated into these courses.                                                                                                                                                                                                                                          |
| 12148                                           | Finance—Workplace Experience  | 12S BUS, 12S BM          | Finance—Workplace Experience courses provide students with work experience in fields related to finance. Goals are typically set cooperatively by the student, teacher, and employer (although students are not necessarily paid). These courses may include classroom activities as well, involving further study of the field or discussion regarding experiences that students encounter in the workplace.                                                                                                                                                                                                                             |
| 12201                                           | Cashier/Checker Operations    | 12S BUS, 12S MAR, 12S BM | Cashier/Checker Operations courses provide students with the knowledge and skills to operate a cash register and to handle numerous transactions. Topics typically include cash register procedures; handling cash, credit, checks, food stamps, and other forms of legal tender; human relations; stocking and marking merchandise; and theft prevention. Job search and employability skills are often an integral part of the course.                                                                                                                                                                                                  |
| <b>Career and Technical Education</b>           |                               |                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Agriculture, Food, and Natural Resources</b> |                               |                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Course Code</b>                              | <b>Course Name</b>            | <b>Endorsements</b>      | <b>Course Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |



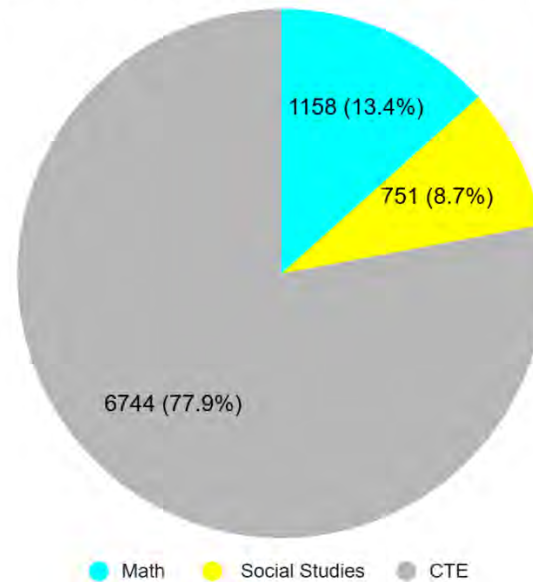
| 18201                                 | Agribusiness Management                 | 18S AB, 18S AG                                                 | Agribusiness Management courses provide students with the information and skills necessary for success in agribusiness and in operating entrepreneurial ventures in the agricultural industry. These courses may cover topics such as economic principles, budgeting, risk management, finance, business law, marketing and promotion strategies, insurance, and resource management. Other possible topics include developing a business plan, employee/employer relations, problem-solving and decision making, commodities, and building leadership skills. These courses may also incorporate a survey of the careers within the agricultural industry. |
|---------------------------------------|-----------------------------------------|----------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 18202                                 | Agricultural Entrepreneurship           | 18S AB, 18S AG, 18S AH, 18S AM, 18S FO, 18S LP, 18S PS, 18S NR | Agricultural Entrepreneurship courses focus on the personal skills necessary for success in entrepreneurial ventures in the agricultural industry. Topics include setting goals, assessing and solving problems, evaluating financial progress and success, business planning, information management and evaluation, and recordkeeping.                                                                                                                                                                                                                                                                                                                    |
| <b>Career and Technical Education</b> |                                         |                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Family and Consumer Sciences</b>   |                                         |                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Course Code                           | Course Name                             | Endorsements                                                   | Course Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 19251                                 | Family and Consumer Sciences—Comprehens | 23S FCS                                                        | Family and Consumer Sciences—Comprehensive courses help students to develop the knowledge and skills that are used to manage one's family and career efficiently and productively. Course topics typically include foods and nutrition; apparel; childcare and development; housing, interior design, and maintenance; consumer decisions; personal financial management; interpersonal relationships; and careers available in family and consumer sciences.                                                                                                                                                                                               |
| 19257                                 | Life Skills                             | 23S FCS                                                        | Life Skills courses provide students with information about a wide range of subjects to assist them in becoming wise consumers and productive adults. These courses often emphasize process skills, including goal setting, decision making, and other topics such as the setting of priorities, money and time management, interpersonal relationships, and the development of the self. Additionally, specific topics such as wellness, selecting and furnishing houses, meeting transportation needs, nutrition, preparing food, selecting clothing and building a wardrobe, insurance, taxation, and consumer protection may also be covered.           |
| 19258                                 | Personal and Career Readiness           | 23S FCS                                                        | Formerly known as Self-Management, Personal and Career Readiness courses introduce students to the skills and strategies that are helpful in becoming more focused, productive individuals, wage earners, and family members. These courses typically emphasize goal setting; decision making; managing time, energy, and stress; and identifying alternatives and coping strategies. They may also allow students to explore various career and lifestyle choices.                                                                                                                                                                                         |
| 19259                                 | Family and Interpersonal Relationships  | 23S FCS                                                        | Formerly known as Family Living, Family and Interpersonal Relationships courses emphasize building and maintaining healthy interpersonal relationships among family members and other members of society. These courses often emphasize (but are not limited to) topics such as the responsibilities of a family and wage earner, balancing a career and personal life, human sexuality and reproduction, marriage preparation, parenthood and the function of the family unit, the family life cycle, and life stages. They also cover topics related to stages of growth and social/dating practices.                                                     |

|       |                                     |                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------|-------------------------------------|-------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 19262 | Consumer Economics/Personal Finance | 23S FCS, 12S BUS, 12S BM                                    | Consumer Economics/Personal Finance courses provide students with an understanding of the concepts and principles involved in managing one's personal finances. These courses emphasize lifespan goal setting, individual and family decision making, and consumer rights as well as topics that are commonly associated with personal finance so that one can become a financially responsible consumer. Topics may include savings and investing, credit, insurance, taxes and social security, spending patterns and budget planning, contracts, and consumer protection. These courses may also investigate the effects of the global economy on consumers and the family. |
| 08056 | Health for Parenting Teens          | 08A HE, 08A HEA, 08S HE, 08S HEA, 08A HPE, 08S HPE, 23S FCS | Designed for pregnant teens and/or parents, topics within Health for Parenting Teens courses cover a wide range of both health and parenting issues, typically including prenatal and postnatal care, health and well-being of young parents, child development, stress management, and parental/adult roles. The courses may also involve academic assistance, career exploration, financial management, and so on.                                                                                                                                                                                                                                                           |
| 08057 | Health and Life Management          | 08A HE, 08A HEA, 08S HE, 08S HEA, 23S FCS, 08A HPE, 08S HPE | Health and Life Management courses focus as much on consumer education topics (such as money management and evaluation of consumer information and advertising) as on personal health topics (such as nutrition, stress management, drug/alcohol abuse prevention, disease prevention, and first aid). Course objectives include helping students develop decision-making, communication, interpersonal, and coping skills and strategies.                                                                                                                                                                                                                                     |

### Student Enrollment by Course Code (2025-2026)

| State Course Title                     | Course Code | # of Students Enrolled   |
|----------------------------------------|-------------|--------------------------|
| Consumer Economics/Personal Finance    | 19262       | 2061                     |
| Finance                                | 12103       | 1524                     |
| Family and Consumer Sciences—Comp      | 19251       | 767                      |
| Consumer Math                          | 2157        | 593                      |
| Business Math                          | 2154        | 545                      |
| Accounting                             | 12104       | 525                      |
| Economics                              | 4201        | 521                      |
| Business Management                    | 12052       | 418                      |
| Entrepreneurship                       | 12053       | 412                      |
| Life Skills                            | 19257       | 296                      |
| Banking and Finance                    | 12101       | 254                      |
| Health and Life Management             | 8057        | 156                      |
| Agribusiness Management                | 18201       | 146                      |
| AP Microeconomics                      | 4203        | 119                      |
| Business Economics                     | 12105       | 86                       |
| Family and Interpersonal Relationships | 19259       | 40                       |
| Financial Algebra                      | 2159        | 40                       |
| Personal and Career Readiness          | 19258       | 32                       |
| AP Macroeconomics                      | 4204        | 25                       |
| Finance—Workplace Experience           | 12148       | 25                       |
| IB Business and Management             | 12059       | 25                       |
| Agricultural Entrepreneurship          | 18202       | 24                       |
| Investing                              | 12107       | 19                       |
| AP Economics                           | 4205        | 0                        |
| Banking                                | 12102       | 0                        |
| Comparative Economics                  | 4202        | 0                        |
|                                        |             |                          |
| # of State Courses Offered=26          |             | Total # of students=8653 |

Financial Literacy Course Type by Student Enrollment



### Additional Resources

- [Montana Financial Literacy & Econ Graduation Requirement Fact Sheet](#)
- Curriculum Resources:
  - o [Financial Literacy-Personal Finance Curriculum Resources CTE](#)
  - o Private curriculum providers also offer free, state-aligned materials to help teachers bridge the resource gap.
- Financial Literacy Standards Crosswalk: [Economics-Financial Literacy throughout the Montana Content Standards](#)
- Professional Development Optional Opportunities:
  - o [Next Gen Personal Finance Certification](#)
  - o [Montana Council on Economic Education \(MCEE\)](#) provide free teacher training and sponsors academic events like the Montana Personal Finance Challenge.

**ITEM 31**

**INFORMATION ON ACCREDITATION  
PERFORMANCE FRAMEWORK COLLEGE  
AND CAREER READINESS METRIC**

**Shannon Boswell  
Nicole Thuotte**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                    |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Information on the Accreditation Performance Framework for College and Career Readiness                                                            |
| <b>Presenter</b>             | Shannon Boswell and Nicole Thuotte                                                                                                                 |
| <b>Position Title</b>        | CTAE Unit Manager and Educate Unit Manager<br>Office of Public Instruction                                                                         |
| <b>Overview</b>              | The purpose is to provide an overview of accreditation performance framework for college and career readiness, and update on the Future Ready Act. |
| <b>Requested Decision(s)</b> | Information Only                                                                                                                                   |
| <b>Related Issue(s)</b>      |                                                                                                                                                    |
| <b>Recommendation(s)</b>     | N/A                                                                                                                                                |

| 9. College and/or Career Readiness Opportunities                                                                                                                                   | Deficiency (0)                                                                                                                                                                                                                                       | Advice (1)                                                                                                                                                                                                                                                                      | Regular MD (2)                                                                                                                                                                                                                                                                                          | Regular (3)                                                                                                                                                                                                                                                                                 |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><i>Guiding Question:</i></p> <p>How is the school ensuring that students graduate college and/or career ready?</p> <p><a href="#">10.55.606(3)</a><br/><i>(High School)</i></p> | <p><input type="checkbox"/> School has less than 5% of graduates at Level 1 of the STARS Act</p> <p><b>OR</b></p> <p><input type="checkbox"/> Less than 20% of all students by graduation have engaged in college and career readiness planning.</p> | <p><b>The school provided evidence of:</b></p> <p><input type="checkbox"/> 5% -10% of graduates at Level 1 of the STARS Act</p> <p><b>OR</b></p> <p><input type="checkbox"/> At least <b>20%</b> of students engaged in college and career readiness planning by graduation</p> | <p><b>The school provided evidence of:</b></p> <p><input type="checkbox"/> <b>10.01%–15%</b> of graduates performing at Level 1 under the STARS Act</p> <p><b>OR</b></p> <p><input type="checkbox"/> At least <b>50%</b> of students engaged in college and career readiness planning by graduation</p> | <p><b>The school provided evidence of:</b></p> <p><input type="checkbox"/> At least <b>15%</b> of graduates at Level 1 of the STARS Act</p> <p><b>OR</b></p> <p><input type="checkbox"/> At least <b>80%</b> of students engaged in college and career readiness planning by graduation</p> |

**DISTRICT MUST CHOOSE PRIOR TO SUBMISSION. (OPI will make STARS Act information available prior to submission)**

#### **GUIDANCE**

Do not submit student work samples as evidence.

Submit information from the cycle year or prior year.

College and career readiness planning may happen in the 8th grade and can be utilized for this rubric.

**Engaging in College and Career Readiness Planning:** A process that helps students make decisions throughout their academic journey, enabling self-discovery, career exploration, academic planning, and college preparation. It outlines a student's academic, personal, and career goals and maps out the steps required to achieve them.

#### **SAMPLE EVIDENCE MAY INCLUDE**

**STARS ACT:** *This information comes from Infinite Campus.*

**Engaged in College and Career Readiness Opportunities Sample Evidence May Include:** Report that shows percentage of students **AND/OR** MCIS **AND/OR** Report from Level All



# Future Ready

## Future Ready component of the STARS Act (HB 252 -2025), 20-9-381, MCA

Future Ready Payment -- Purpose -- Calculation -- Definitions

**20-9-381. Future ready payment -- purpose -- calculation -- definitions.** (1) Beginning in fiscal year 2028, the state shall provide a future ready payment to school districts. The payment is composed of incentive amounts as described in [20-9-306](#) and this section. The purpose of the payment is to:

- (a) expand personalized career and technical education opportunities for middle school and high school pupils;
- (b) reduce out-of-pocket costs for pupils and families in support of a pupil's postsecondary success;
- (c) empower pupils to actively engage in forming their postsecondary success path; and
- (d) provide expanded flexibility to districts to support the alignment of each pupil's postsecondary success path with each pupil's individual interests, passions, strengths, needs, and culture.

(2) The incentive amount of the future ready payment is based on three goal levels:

- (a) goal level 1, high school graduates who while in high school earned 15 or more postsecondary or CTE-equivalent credits;
- (b) goal level 2, high school graduates who while in high school earned 30 or more postsecondary or CTE-equivalent credits; and
- (c) goal level 3, high school graduates who while in high school earned an associate-level degree.



# Future Ready

## Future Ready component of the STARS Act (HB 252 -2025), 20-9-381, MCA

(3) (a) A high school graduate may reach goal levels 1 and 2 using any combination of postsecondary and CTE-equivalent credits.

(b) A high school graduate who achieves a higher future ready goal level does not generate a lower goal level payment.

(4) For the purposes of [20-9-382](#) and this section, the following definitions apply:

(a) "CTE-equivalent credit" means the career and technical education (CTE) credit value ascribed by the department of labor and industry as set forth in [20-9-382](#).

(b) (i) "Postsecondary credit" means the successful completion of a course of study by a student enrolled in a high school district or K-12 school district that results in the student's eligibility for transcripted credit within the Montana university system.

(ii) No later than December 1, the commissioner of higher education shall provide to the office of public instruction an annually updated list of the criteria of courses of study, including any completion or examination requirements, that a high school student may take that result in eligibility for transcripted credit at any unit of the Montana university system based on the adopted policies of the board of regents of higher education. If the number of credits differs based on examination results, the list must include these differentiated credit values. The list submitted applies to the achievements of high school graduates from the prior school year.



# Future Ready

Adds a Future Ready payment to the district's BASE budget

Three goal levels determine funding (based on the max per-ANB payment for the budget year):

- Level 1 = 15 or more “points”
- Level 2 = 30 or more “points”
- Level 3 = Associate-level degree



# Future Ready

Future Ready component of the STARS Act (HB 252 -2025), 20-9-381, MCA

The district with the **graduation record** gets 10% of the high school maximum per-ANB payment for every Level 1, 20% of the high school maximum per-ANB payment for every Level 2, and 30% of the high school maximum per-ANB payment for every Level 3.

The district where the student was counted for **Spring ANB in their 8<sup>th</sup> grade year** gets 10% of the elementary school maximum per-ANB payment for every Level 1, 20% of the elementary maximum per-ANB payment for every Level 2, and 30% of the elementary maximum per-ANB payment for every Level 3.



# Future Ready

- Industry Recognized Credentials (IRCs)
- Dual Credit Courses
- AP/IB Courses and Test Scores
- Concurrent Credit
- Associate Level Degree



# Future Ready

The Department of Labor and Industry adopts (in Administrative Rule) a list of industry-recognized credentials, combinations of credentials and work-based learning experiences – and their associated credit (point) values.

Credit (point) values are accumulated in 3 credit (point) increments. Some experiences may be “stackable” (multiple credentials to get to 3 points).



# Future Ready

## [Montana Credential Registry](#)

This site contains both approved credentials and a link to a form to propose additional credentials

## [Montana Credential Registry Proposal Form \(Page 1 of 3\)](#)

# Future Ready

IRC's are recorded as Assessments using the state-published framework. Choose the credential and enter the date earned.



Assessment ☆

Student Information > General > Assessment

Related Tools ▾

Save

New

Delete

 Print

Industry Recognized Credentials

Enter Date Earned

FR-Microsoft Certified: Security Operation Analyst Associate

FR-Microsoft Certified: Dynamics 365 Fundamentals [ERP] (Stackable)

FR-Introduction to Cybersecurity /Cisco Networking Academy (Stackable)

FR-Junior Cybersecurity Analyst/Cisco Networking Academy

Date

Activity Registration

Ad Hoc Letters

Assessment

Athletics

Attendance

Behavior

Blended Learning Group Assignments

Contact Log



# Future Ready

## Dual Credit Courses

Additional indicators for Institution, College Credit and Credit Type (semester, quarter) have been added.

*\*\*Student is not required to opt in for credit to be eligible for Future Ready “points” (credit)*



# Future Ready

## Dual Credit Courses

### Course Information ☆

02121 M121 College Algebra - DC

Course Master Linked - 02121 M121 College Algebra - DC

Number:

02121

Name:

M121 College Algebra - DC

Active:



State Code:

02121

NCES Code:

02121GE0.5011

SCED Subject Area:

02: Mathematics

Available Carnegie Unit Credit:

0.50

SCED Course Level: (Required)

GE: General Education

SCED Lowest Grade:

11: Grade 11

SCED Highest Grade:

12: Grade 12

### State Defined

High School Credit:



CTE Pathway:

Select all that apply

Work Based Learning:



WBL Partner:

Maximum 200 characters

Type:

DC: Dual Credit

Distance Class:

Alternative Ed Program:



Vocational Code:



Dual Enrollment Credit:



\*\*\*NEW

Institution:

UM HC: Helena College University of Mont...

College Credit Equivalent:

3.00

Credit Type:

S: Semester



# Future Ready

## AP/IB Courses & Tests

Students taking AP/IB courses may be eligible for Future Ready “points” – based on their test scores.

The Montana Board of Regents has approved Future Ready equivalents for each test and score.

No new Course fields are required: AP/IB courses are already identified by the course code!



# Future Ready

Course Information ☆

01005 AP Language

Collapse All

General Course Information

Course Master Linked - 01005 AP Language

Number:

01005

Name:

AP Language

Active:

☒

State Code:

01005

NCES Code:

01005HO1.0011

SCED Subject Area:

01: English Language and Literature (Secondary)

SCED Course Identifier:

005: MT-AP English Language and Composition

Available Carnegie Unit Credit:

1.00

SCED Course Level: (Required)

HO: Honors

SCED Sequence: (part n of m parts)

1 of 1

SCED Lowest Grade:

11: Grade 11

SCED Highest Grade:

11: Grade 11



# Future Ready

## Concurrent Credit

Students may be taking college courses that are not eligible for high school credit. These courses may be taken outside of the regular school day and/or the regular school year.

Student will bring a collegiate transcript to prove completion.

Concurrent credits are entered as courses. Select CC: Concurrent Credit under Type on the Course Information tab. Indicate Institution, College Credit, and Credit Type (Semester, Quarter).



# Future Ready

State Defined

High School Credit:

☐

6

CTE Pathway:

Select all that apply

Work Based Learning:

☐

5. Indicate CC: Concurrent Credit

6. Un-Check High School Credit

Type:

5

CC: Concurrent Credit

Distance Class:

Alternative Ed Program:

☐

Vocational Code:

☐

WBL Partner:

Maximum 200 characters

7. Select Institution

8. Add College Credit

9. Indicate Credit Type

Dual Enrollment Credit:

☐

Institution:

7

MSU GF: Great Falls College Montana Stat...

College Credit Equivalent:

8

3.00

Credit Type:

9

S: Semester



# Future Ready

## Associate's Degree

Students who complete an Associate-Level Degree prior to high school graduation count as Future Ready Level 3.

Student bring a collegiate transcript to prove completion. Associate Degree information is entered on the Graduation tab – under State Seal Information.

Fields include Degree, Institution, Credits Earned, and Credit Type.

*Pathway: Student Information > General > Graduation*



# Future Ready

## General Graduation Information

**Diploma Date:**  

**Diploma Type:**

**Diploma Period:**

**Date First Entered the 9th Grade:**  

**Federal Re-assigned Cohort End Year:**

**NCLB Cohort End Year:**

**Post Grad Location:**

**Post Grad Plans:**

**Student Post Grad Confirmation:**   

Indicates the most recent student acknowledgement of their Post Graduation Plans.

1. Select Degree Type (AA, AS, AAS, Other)
2. Date Earned
3. Credit Type
4. Credits Earned
5. Institution

## State Seal Information

| State Seals and Certs <span>1</span>                                                                                           | Date Earned <span>2</span>                                                                                                   | Award Type           | Credit Type <span>3</span>               | Credits Earned <span>4</span>   | Institution <span>5</span>                        | Language             |
|--------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|----------------------|------------------------------------------|---------------------------------|---------------------------------------------------|----------------------|
|  <input type="text" value="03: AA Degree"/> | <input type="text" value="05/15/2026"/>  | <input type="text"/> | <input type="text" value="S: Semester"/> | <input type="text" value="60"/> | <input type="text" value="FVCC: Flathead Valle"/> | <input type="text"/> |
| <input type="button" value="Add State Seal"/>                                                                                  |                                                                                                                              |                      |                                          |                                 |                                                   |                      |



**ITEM 32**

**INFORMATION ON THE PROPOSED  
CORRECTIVE PLANS FOR SCHOOLS IN  
DEFICIENT AND ADVICE STATUS FOR  
ACCREDITATION**

**Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                                                                              |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Proposed Corrective Plan Process and 2025-2026 list of schools                                                                                                                                               |
| <b>Presenter</b>             | Crystal Andrews                                                                                                                                                                                              |
| <b>Position Title</b>        | Senior Manager, School and Educator Effectiveness<br>Office of Public Instruction                                                                                                                            |
| <b>Overview</b>              | The purpose is to provide an overview of the proposed corrective plan process for accreditation and a list of schools required to complete a plan for September 2026, and progress reports in November 2026. |
| <b>Requested Decision(s)</b> | Information Only                                                                                                                                                                                             |
| <b>Related Issue(s)</b>      | 10.55.602(10), 10.55.605(4-6)                                                                                                                                                                                |
| <b>Recommendation(s)</b>     | N/A                                                                                                                                                                                                          |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
**opi.mt.gov**



## Accreditation Corrective Plans 2025-2026 Information Item

The Standards of Accreditation require any district that receives an advice or deficiency overall rating on accreditation to submit a corrective action plan. Thirty-two (32) schools received an overall rating of advice or deficiency in the 2024-2025 school year and needed to complete a corrective plan. Of these 32 schools, 13 will submit progress reports in November of 2026, on their corrective plans, 3 will submit a corrective plan in September of 2026, 11 have no action, and 5 have been moved to intensive assistance. Below is a breakdown of the next steps these 32 schools need to take:

- **13 schools** maintained advice status and will submit a progress report for their corrective plan. Highlighted in **blue** in the chart below.
- **6 schools** voluntarily re-submitted for accreditation in 2025-2026 to improve their rating and no action required. Highlighted in **gray** in the chart below.
- **1 school** required to submit accreditation in 2025-2026 to improve their rating, but maintained advice status, placing them in deficiency status. The school will be required to submit a corrective plan and submit for accreditation in 2026-2027. Highlighted in **yellow** below.
- **2 schools** did not submit a corrective plan/progress report and have been determined deficient as a result. They will be required to submit a corrective plan and complete the accreditation process in SY 2026-2027. Highlighted in **yellow** below.
- **5 schools** have been determined to be intensive assistance. As a result, they will not submit a corrective plan because they are following the more rigorous intensive assistance process. They are highlighted in **green** below.
- **5 schools** were granted provisional accreditation and will be submitting accreditation for in the SY 2026-2027, due to their provisional status, they will not submit a corrective action plan. Highlighted in **gray** in the chart below.

**10.55.605 CATEGORIES OF ACCREDITATION** (6) For a district with a school in advice or in deficiency status, the district administrator and the chair of the local board of trustees shall submit to the Superintendent of Public Instruction a corrective plan, including a systematic procedure and timeline for resolving the deviations noted.

**10.55.602 DEFINITIONS** (10) "Corrective plan" means a systematic procedure and timeline for resolving deviations when a school has an accredited with probation status.

The corrective plan includes the following sections:

1. The reason the school is in a corrective plan.
2. Describe the systematic procedure and timeline for resolving deviations.



3. Define the specific area requiring improvement and identify the underlying reasons contributing to the accreditation status of advice or deficiency through data and root cause analysis.
4. Outline the specific steps to address the area of improvement. (Examples: professional development, resource allocation for staffing or materials, collection of relevant evidence/data, etc.)
5. Identify responsible parties and deadlines for corrective action.
6. Describe how progress will be tracked and monitored.
7. Provide evidence that the local board of trustees has approved the plan.

| District Name             | School Code | School Name                    | Overall Rating | Assurance Rating | Student Perform. Rating | SY 2025-2026 Status Change      |
|---------------------------|-------------|--------------------------------|----------------|------------------|-------------------------|---------------------------------|
| Lodge Grass Public Schls  | 1669        | Lodge Grass 7-8                | Advice         | Regular MD       | Advice                  |                                 |
| Centerville Public Schls  | 1654        | Big Stone School               | Advice         | Regular          | Advice                  |                                 |
| Centerville Public Schls  | 1854        | Hill Top Colony School         | Advice         | Regular          | Advice                  |                                 |
| Springhill Elementary     | 0479        | Springhill School              | Advice         | Regular          | Advice                  |                                 |
| Browning Public Schools   | 0543        | Browning High School           | Advice         | Regular          | Advice                  |                                 |
| Stanford K-12 Schools     | 0617        | Stanford School                | Advice         | Regular          | Advice                  | Did not submit Deficient status |
| Stanford K-12 Schools     | 1716        | Stanford 7-8                   | Advice         | Regular          | Advice                  | Did not submit Deficient status |
| Hobson K-12 Schools       | 0623        | Hobson High School             | Advice         | Regular          | Advice                  | Submitted 2026 Regular status   |
| Geyser K-12 Schools       | 0626        | Geyser School                  | Advice         | Regular          | Advice                  |                                 |
| Helena Public Schools     | 3023        | Mount Ascension Learning Ac EL | Advice         | Regular          | Advice                  |                                 |
| Helena Public Schools     | 3024        | Mount Ascension Learning Ac MS | Advice         | Regular          | Advice                  |                                 |
| Twin Bridges K-12 Schools | 0724        | Twin Bridges High School       | Advice         | Regular MD       | Advice                  |                                 |
| Vida Elementary           | 0755        | Vida School                    | Advice         | Regular          | Advice                  |                                 |
| Heart Butte K-12 Schools  | 0886        | Heart Butte Elementary         | Deficiency     | Regular MD       | Deficiency              | Intensive Assistance            |
| Heart Butte K-12 Schools  | 1656        | Heart Butte High School        | Deficiency     | Regular MD       | Deficiency              | Intensive Assistance            |
| Heart Butte K-12 Schools  | 1748        | Heart Butte 6-8                | Deficiency     | Regular MD       | Deficiency              | Intensive Assistance            |



| District Name              | School Code | School Name                   | Overall Rating | Assurance Rating | Student Perform. Rating | SY 2025-2026 Status Change             |
|----------------------------|-------------|-------------------------------|----------------|------------------|-------------------------|----------------------------------------|
| Corvallis K-12 Schools     | 3010        | Rise Charter & Distance EL    | Advice         | Regular          | Advice                  | Approved for Provisional Accreditation |
| Corvallis K-12 Schools     | 3011        | Rise Charter & Distance 7-8   | Advice         | Regular          | Advice                  | Approved for Provisional Accreditation |
| Corvallis K-12 Schools     | 3013        | Rise Charter & Pathways EL    | Advice         | Regular          | Advice                  | Approved for Provisional Accreditation |
| Corvallis K-12 Schools     | 3014        | Rise Charter & Pathways 7-8   | Advice         | Regular          | Advice                  | Approved for Provisional Accreditation |
| Lame Deer Public Schools   | 1035        | Lame Deer School              | Deficiency     | Regular          | Deficiency              | Intensive Assistance                   |
| Lame Deer Public Schools   | 1626        | Lame Deer 7-8                 | Deficiency     | Regular          | Deficiency              | Intensive Assistance                   |
| Lame Deer Public Schools   | 1816        | Lame Deer High School         | Advice         | Regular          | Advice                  | Submitted 2026 Deficient status        |
| Choteau Public Schools     | 1148        | Choteau High School           | Advice         | Regular          | Advice                  |                                        |
| Harlowton Public Schools   | 1228        | Hillcrest School              | Advice         | Regular MD       | Advice                  | Submitted 2026 Regular status          |
| Harlowton Public Schools   | 1787        | Hillcrest 7-8                 | Advice         | Regular MD       | Advice                  | Submitted 2026 Regular status          |
| Billings Public Schools    | 3003        | Billings Multilingual Academy | Advice         | Regular          | Advice                  | Approved for Provisional Accreditation |
| Jefferson High School      | 0611        | Jefferson High School         | Advice         | Regular          | Advice                  | Submitted 2026 Regular status          |
| Ekalaka Public Schools     | 0133        | Carter County High School     | Advice         | Regular MD       | Advice                  |                                        |
| Sun River Valley Pub Schls | 1657        | Cascade Colony School         | Advice         | Regular          | Advice                  |                                        |
| Lustre Christian High      | 9320        | Lustre Christian H S          | Deficiency     | Advice           | Deficiency              | Submitted 2026 Regular status          |
| Two Eagle River Schools    | 9405        | Two Eagle River High Schl     | Advice         | Advice           | Advice                  | Submitted 2026 Regular status          |

**ITEM 33**

**ACCREDITATION UPDATE**

**Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                   |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Accreditation Update: 2026-2027 Cycle                                                                                             |
| <b>Presenter</b>             | Crystal Andrews                                                                                                                   |
| <b>Position Title</b>        | Senior Manager, School and Educator Effectiveness<br>Office of Public Instruction                                                 |
| <b>Overview</b>              | The purpose is to provide an overview of schools required to complete the accreditation process during the 2026-2027 school year. |
| <b>Requested Decision(s)</b> | Information Only                                                                                                                  |
| <b>Related Issue(s)</b>      |                                                                                                                                   |
| <b>Recommendation(s)</b>     | N/A                                                                                                                               |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)





## Accreditation Update

### Board of Public Education- July

| Accreditation Process Three-Year Cycles                                   |                              |                                 |
|---------------------------------------------------------------------------|------------------------------|---------------------------------|
| Cycle 1- 2026-2027                                                        |                              |                                 |
| MASS Regions- Group A: North Central, Hi-Line, North East, and South East |                              |                                 |
| Augusta Public Schools                                                    | Fairfield Public Schools     | Nashua K-12 Schools             |
| Alzada Elementary                                                         | Fairview Public Schools      | Northern Cheyenne Tribal Schls  |
| Ashland Elementary                                                        | Forsyth Public Schools       | North Harlem Colony Elem        |
| Bainville K-12 Schools                                                    | Fort Benton Public Schools   | North Star Public Schools       |
| Baker K-12 Schools                                                        | Frazer Public Schools        | Opheim K-12 Schools             |
| Bear Paw Elementary                                                       | Froid Public Schools         | Pendroy Elementary              |
| Belt Public Schools                                                       | Frontier Elementary          | Pine Grove Elementary           |
| Benton Lake Elementary                                                    | Galata Elementary            | Plentywood K-12 Schools         |
| Biddle Elementary                                                         | Geraldine Public Schools     | Plevna K-12 Schools             |
| Big Sandy Public Schools                                                  | Gildford Colony Elementary   | Poplar Public Schools           |
| Birney Elementary                                                         | Glasgow K-12 Schools         | Power Public Schools            |
| Bloomfield Elementary                                                     | Glendive Public Schools      | Rau Elementary                  |
| Box Elder Public Schools                                                  | Golden Ridge Elementary      | Richey Public Schools           |
| Broadus Public Schools                                                    | Great Falls Public Schools   | Rocky Boy Public Schools        |
| Brockton Public Schools                                                   | Great Falls Central Cath HS  | Rosebud Public Schools          |
| Brorson Elementary                                                        | Greenfield Elementary        | Ross Elementary                 |
| Browning Public Schools                                                   | Harlem Public Schools        | S Y Elementary                  |
| Bynum Elementary                                                          | Havre Public Schools         | Saco Public Schools             |
| Cascade Public Schools                                                    | Hawks Home Elementary        | Savage Public Schools           |
| Centerville Public Schools                                                | Hays-Lodge Pole K-12 Schools | Scobey K-12 Schools             |
| Chester-Joplin- Invern. Schools                                           | Highwood Public Schools      | Shelby Public Schools           |
| Chinook Public Schools                                                    | Hinsdale Public Schools      | Sidney Public Schools           |
| Choteau Public Schools                                                    | Jordan Public Schools        | St. Labre Schools               |
| Circle Public Schools                                                     | Kester Elementary            | Sun River Valley Public Schools |
| Cleveland-Lone Tree Elementary                                            | Kinsey Elementary            | Sunburst K-12 Schools           |
| Cohagen Elementary                                                        | Kircher Elementary           | Terry K-12 Schools              |
| Colstrip Public Schools                                                   | Knees Elementary             | Trail Creek Elementary          |
| Conrad Public Schools                                                     | Lambert Public Schools       | Turner Public Schools           |
| Cottonwood Elementary                                                     | Liberty Elementary           | Ulm Elementary                  |
| Culbertson Public Schools                                                 | Lindsay Elementary           | Valier Public Schools           |
| Cut Bank Public Schools                                                   | Lustre Christian High School | Vaughn Elementary               |
| Davey Elementary                                                          | Lustre Elementary            | Vida Elementary                 |
| Deer Creek Elementary                                                     | Malta K-12 Schools           | Westby K-12 Schools             |
| Dodson K-12 Schools                                                       | Medicine Lake K-12 Schools   | Whitewater K-12 Schools         |
| Dupuyer Elementary                                                        | Miami Elementary             | Wibaux K-12 Schools             |
| Dutton/Brady K-12 Schools                                                 | Miles City Public Schools    | Wolf Point Public Schools       |
| East Glacier Park Elementary                                              | Montana Sch for Deaf & Blind | Zurich Elementary               |
| Ekalaka Public Schools                                                    | Mountain View Elementary     |                                 |



| <b>Schools in Deficiency Status<br/>(After SY 2025-2026)</b> |
|--------------------------------------------------------------|
| Lame Deer High School                                        |
| Stanford School                                              |
| Stanford Junior High                                         |

| <b>Public Charters<br/>(After Approved Provisional Status Ended SY25-26)</b> |
|------------------------------------------------------------------------------|
| Billings Multilingual Academy- Middle School                                 |
| Corvallis Rise Charter and Distance Learning Academy- Elementary School      |
| Corvallis Rise Charter and Distance Learning Academy- Middle School          |
| Corvallis Rise Charter and Pathway Learning Academy- Elementary School       |
| Corvallis Rise Charter and Pathway Learning Academy- Middle School           |

Presented by Crystal Andrews, Senior Manager of School & Educator Effectiveness

## **ITEM 34**

### **ACTION ON THE ACCREDITATION STATUS FOR NEW PUBLIC SCHOOLS**

- **Creston 7-8 – Provisional**
- **Martinsdale Colony – Provisional**
- **Meadow Lane Colony – Provisional**

**Crystal Andrews**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                                                                                                                     |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Action on provisional accreditation status for Creston 7-8, Martinsdale Colony, and Meadow Lane Colony.                                                                                             |
| <b>Presenter</b>             | Crystal Andrews                                                                                                                                                                                     |
| <b>Position Title</b>        | Senior Manager, School and Educator Effectiveness<br>Office of Public Instruction                                                                                                                   |
| <b>Overview</b>              | Review the provisional accreditation timeline for three new schools and the Superintendent's recommendation.<br><br>The schools include:<br>Creston 7-8<br>Martinsdale Colony<br>Meadow Lane Colony |
| <b>Requested Decision(s)</b> | Action Item                                                                                                                                                                                         |
| <b>Related Issue(s)</b>      | None                                                                                                                                                                                                |
| <b>Recommendation(s)</b>     | Approve provisional accreditation status for Creston 7-8, Martinsdale Colony, and Meadow Lane Colony.                                                                                               |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)



## Provisional Accreditation Timeline for New Schools

### Action Item

#### Creston 7-8, Martinsdale Colony, and Meadow Lane Colony

| School             | Accreditation Step                                                                                                                                                                                                                                                                                                                                                                                                                                     | School Year | Anticipated Date(s)                                                   | Recommendation                                                                                                                                   | Year of Cycles                                                                |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| Creston 7-8        | IX. The OPI Accreditation staff presents an initial accreditation report to the state superintendent. If approved, the state superintendent recommends the BPE approve the request for provisional approval of accreditation.                                                                                                                                                                                                                          | 2026-27     | BPE Meeting-<br>July 24, 2026                                         | The State Superintendent recommends the approval of provisional accreditation for 2026-27 and 2027-28.                                           | Establish Baseline-<br>2026-27<br><br>Cycle Year-<br>2027-28                  |
| Martinsdale Colony | IX. The OPI Accreditation staff presents an initial accreditation report to the state superintendent. If approved, the state superintendent recommends the BPE approve the request for provisional approval of accreditation.                                                                                                                                                                                                                          | 2026-27     | BPE Meeting-<br>July 24, 2026                                         | The State Superintendent recommends the approval of provisional accreditation for 2026-27 and 2027-28.                                           | Establish Baseline-<br>2026-27<br><br>Cycle Year-<br>2027-28                  |
| Meadow Lane Colony | VI. Following the presentation to the BPE, the OPI conducts a site visit. The OPI site review team may include, but is not limited to: <ul style="list-style-type: none"> <li>•OPI accreditation staff member</li> <li>•District superintendent</li> <li>•School principal</li> <li>•Curriculum coordinator</li> <li>•Special education representative</li> </ul> <p><b>* Updated information from the site visit will be presented in person.</b></p> | 2026-27     | Site Visit-<br>July 10, 2026<br><br><br>BPE Meeting-<br>July 24, 2026 | <b>Pending Site Visit Outcome:</b><br><br>The State Superintendent recommends the approval of provisional accreditation for 2026-27 and 2029-30. | Establish Baseline (and Cycle Year)-<br>2026-27<br><br>Cycle Year-<br>2029-30 |

#### *What is provisional approval?*

- Provisional approval of accreditation means the school has initially demonstrated alignment between the district/school basic education program, operating procedures, and the minimum requirements of Chapter 55 Standards of Accreditation.
- To retain provisional approval of accreditation the school must meet accreditation status of regular or regular with minor deviations for two cycles.**
- Accreditation deviations resulting in advice or deficiency status during this period will result in the loss of provisional approval of accreditation status.

**ITEM 35**

**INFORMATION ON OPENING AND  
CLOSING OF PUBLIC SCHOOLS**

**Autumn Warren**

# Montana Board of Public Education

## Executive Summary

**Date:** July 23-24, 2026

|                              |                                                                                                    |
|------------------------------|----------------------------------------------------------------------------------------------------|
| <b>Presentation</b>          | Information on Opening and Closing of Public Schools                                               |
| <b>Presenter</b>             | Autumn Warren                                                                                      |
| <b>Position Title</b>        | School Finance Manager                                                                             |
| <b>Overview</b>              | This presentation provides an overview of the procedure for opening and closing of public schools. |
| <b>Requested Decision(s)</b> | Information Only                                                                                   |
| <b>Related Issue(s)</b>      |                                                                                                    |
| <b>Recommendation(s)</b>     | N/A                                                                                                |



Montana  
**Office Of Public Instruction**  
Susie Hedalen, State Superintendent  
[opi.mt.gov](http://opi.mt.gov)





# What Happens When A District Closes?

Autumn Warren – School Finance Manager - OPI

# Definitions and Steps

- Non-Operating – a district that will not operate during the ensuing school fiscal year. Temporarily close the doors for up to three(3) years. 20-9-505, MCA
- Abandoned – a district that is closing after nonoperating for three(3) consecutive years. Permanently close. 20-6-209, MCA
  - District first goes into nonoperating status.
  - After 3 years of nonoperation the district must decide to reopen or abandon/attach.



# First: District Must Go Into Nonoperating Status

- The district holds a board meeting and passes a resolution to go into Nonoperating status. 20-6-509, MCA
- The district sends a letter of intent written on district letterhead to the School Finance Division. The letter should contain the language of the resolution that has been passed by the Board of Trustees.
- The district notifies the county treasurer that they will open a nonoperating fund, Fund 19 Nonoperating Fund. 20-9-505, MCA



# Example Of A Recent Request



**SALMON PRAIRIE SCHOOL**

*Four Walls with Tomorrow Inside*

Swan Lake-Salmon School District #73 - Salmon Prairie School  
40224 Salmon Prairie Road  
23187 MT Highway 83 (Clerk)  
Swan Lake, MT 59911  
May 26, 2026

Be it Resolved that the Swan Lake-Salmon Elementary District #73 because of continued enrollment under 10 students, which has caused a financial burden on the local taxpayers, has by action of their Board of Trustees at a special meeting, has voted unanimously to close the only K-8 elementary school in this district.

This decision is effective for the students and families at the end of the current school year 2025-2026, ending on June 12, 2026.

The Board of Trustees understand there are fiscal and FAPE responsibilities into the 2026-2027 school year, and will follow legal counsel from the Office of Public Instruction to fulfill all their responsibilities.

The Board of Trustees is not seeking a 3-year Non-Operational status, but is hoping to conclude all fiscal responsibilities within the 26-27 school year, so as not to continue to burden the Swan Lake-Salmon District taxpayers.

Manuel O. Jarama

- Chairman of the Board

Carol Duggan

- District Clerk

Carolyn D. Hall

- Lake County Supt. of Schools



Montana Office of Public Instruction  
Susie Hedalen, State Superintendent

# NONOPERATING STATUS

- Open Fund 19 - NonOperating Fund
- Transfer all fund balances to Fund 19. Except for the balances in Fund 15 Miscellaneous and Fund 50 Debt Service, the balances remain in the fund.
- Do not close any funds, transfer the amounts only.
- During nonoperating status, the district may make expenditures for essential obligations. Authorized expenditures may include:
  - Building Maintenance such as utilities, cleaning, etc.
  - Salaries for the clerk of the district
  - Tuition and transportation
- The district will no longer receive a General Fund budget or State payments.



# NONOPERATING STATUS

- Fund 19 Nonoperating is funded by a permissive levy, if needed.
- Fund 19 Nonoperating is budgeted. Permissive levy funds are required to minimally operate the district while in Nonoperating status.
- A district may remain Nonoperating for three(3) consecutive years. At the end of the third year, the trustees must decide to reopen or abandon and attach (permanently close)



# Abandon and Attach – Permanently Close

## 20-6-209. Elementary district abandonment.

(1) The county superintendent shall declare an elementary district to be abandoned and order the attachment of the territory of the district to a contiguous district or districts of the county or, with the consent of the county superintendent of an adjacent county, to a contiguous district or districts in the adjacent county when:

(a) a school has not been operated by a district for at least the minimum aggregate hours under the provisions of 20-1-301 for each of 3 consecutive school fiscal years or a lesser number of aggregate hours as approved by the board of trustees under the provisions of 20-9-806; or

(b) there is an insufficient number of residents who are qualified electors of the district that can serve as the trustees and clerk of the district so that a legal board of trustees can be organized.

(2) The county superintendent shall notify the elementary district that has not operated a school for 2 consecutive years before the first day of the third year that the failure to operate a school for the minimum aggregate hours or a lesser number of aggregate hours than approved by the board of trustees under the provisions of 20-9-806 during the ensuing school fiscal year constitutes grounds for abandonment of the district at the conclusion of the succeeding school fiscal year. Failure by the county superintendent to provide the notification does not constitute a waiver of the abandonment requirement prescribed in subsection (1)(a).

(3) Any abandonment under subsection (1)(a) becomes effective on July 1. Any abandonment of an elementary district under subsection (1)(b) becomes effective immediately on the date of the abandonment order.





# Abandon and Attach – Permanently Close

- County Superintendent declares the district abandoned and orders the attachment.
- Notifies the Office of Public Instruction of the permanent closure.
- Identifies which District(s) will absorb (attach) the closing district.
- If more than one district is involved in the absorption – identify the percentage of students to go to each district.
- The Office of Public Instruction will close out the district in Central Processing.



# Example of Percentages of Attachment



Superintendent of Schools  
Mark Ranstrom

400 E. 4<sup>th</sup> Ave. N. | P.O. Box 1139 | Office (406) 322-8057 | Fax (406) 322-8007 | [mr@stillwatercountymt.gov](mailto:mr@stillwatercountymt.gov)

March 28, 2024

Andrea Mohammad  
Financial Specialist  
Montana Office of Public Instruction

Dear Andrea:

I have verified with our County Assessor that the percentage of students allocated to Rapelje District #32 and Broadview School District #21 from the Abandonment of Molt School District #12-12 are 60% to Broadview and 40% to Rapelje.  
Thank you.

Sincerely,

Mark Ranstrom  
County Supt. of Schools



Montana Office of Public Instruction Susie Hedalen, State  
Superintendent

What happens if a district loses  
its students mid year?

# District has zero kids after the start of the school year

- If all of the students that were enrolled at the district in a fiscal year do not stay until the end of the school year, the district must enter nonoperating status since they are not providing education services to students.
- If a district loses all their students during the school year, they need to notify the School Finance Division at the OPI of this fact.
- The district will not receive any General Fund State payments for months they are not providing educational services.

# Main ways to go into Nonoperating status

- It is preferred if a district knows they are not going to have students in the ensuing fiscal year that they notify the OPI School Finance Division as soon as possible.
- This allows staff to process the closure before July 1<sup>st</sup>.
- A district can go nonoperating mid-year if they no longer have students they are providing services for.
- In this case State payments end and the school closes mid-year.

# Nonoperating Fund and Funding

- The nonoperating fund is funded by permissive levy and the fund balances from the other funds that roll into it when a district goes nonoperating.
- Example: If there is a \$10,000 fund balance in the general fund when a district goes nonoperating that \$10,000 then goes towards funding the amount needed in the nonoperating fund and decreases the need for permissive levy.

**ITEM 36**

**ACTION ON THE PROPOSED NOTICE OF  
PUBLIC HEARING AND TIMELINE  
PERTAINING TO RULEMAKING IN ARM  
TITLE 10, CHAPTER 55, SPECIAL  
EDUCATION TECHNICIAN STANDARDS  
AND AUTHORIZE FILING OF THE NOTICE  
WITH THE SECRETARY OF STATE FOR  
PUBLICATION IN THE MONTANA  
ADMINISTRATIVE REGISTER**

**Dr. Hannah Nieskens**





**MONTANA  
ADMINISTRATIVE  
REGISTER**



**BOARD OF PUBLIC EDUCATION**

---

**NOTICE OF PROPOSED RULEMAKING**

**MAR NOTICE NO. 2026-176.1**

**Summary**

Adoption of New Rule 1 (10.55.725) and amendment of 10.55.602 and 10.55.805 pertaining to the Special Education Technician in the Accreditation Standards

---

**Hearing Date and Time**

Tuesday, September 1, 2026, at 10:00 a.m.

**Virtual Hearing Information**

Please click the link below to join the webinar:

<https://mt-gov.zoom.us/j/89725865122>

**Comments**

Comments may be submitted using the contact information below. Comments must be received by Thursday, September 10, 2026, at 5:00 p.m.

---

**Accommodations**

The agency will make reasonable accommodations for persons with disabilities who wish to participate in this rulemaking process or need an alternative accessible format of this notice. Requests must be made by Tuesday, August 18, 2026, at 5:00 p.m.

---

## Contact

McCall Flynn  
(406) 444-6576  
bpe@mt.gov

---

## General Reasonable Necessity Statement

The Board of Public Education is seeking to clarify ARM 10.55.805 regarding special education graduation requirements and to consider the addition of definitions, duties, and responsibilities of a special education technician. The Negotiated Rulemaking Process is required by § 20-7-101, MCA. The rules recommended by the Superintendent of Public Instruction were developed through the negotiated rulemaking process under Title 2, chapter 5, part 1. Based on adoption of ARM 10.57.439, for the new Special Education Technician certification, it is necessary to concurrently define the roles and responsibilities of the technician and supervising special education teacher.

The purpose of the Special Education Technician certification, defined in ARM 10.57.439, is to increase the capacity of Montana's paraprofessionals to provide a higher level of support to Montana students with disabilities. In particular, the purpose is to certify a technician, who meets requirements to provide technical services to a special education supervising teacher, while outlining the qualifications and supervision requirements under a Supervising Special Education Teacher.

---

## Rulemaking Actions

### AMEND

The rules proposed to be amended are as follows, stricken matter interlined, new matter underlined:

### 10.55.602 DEFINITIONS

For the purposes of this chapter, the following terms apply:

- (1) "Accreditation" means certification by the Board of Public Education that a school meets the adopted standards of the Board of Public Education for a specified school year.

- (2) "Assessment" means the gathering, organizing, and evaluation of information about student learning progression, growth, and proficiency in order to monitor and measure the effectiveness of the instructional program.
- (3) "Assurance standards" means the minimal standards of a quality education program comprised of the following subchapters:
  - (a) Subchapter 6, General Provisions, ARM 10.55.601 through 10.55.608;
  - (b) Subchapter 7, School Leadership, ARM 10.55.701 through 10.55.724;
  - (c) Subchapter 8, Educational Opportunity, ARM 10.55.801 through 10.55.806;
  - (d) Subchapter 9, Academic Requirements, ARM 10.55.901 through 10.55.910; and
  - (e) ARM 10.55.1001 through 10.55.2301.
- (4) "Asynchronous" means not occurring at the same time. "Asynchronous" refers to instruction and communication between participants (i.e., students and teachers) that occur at different times.
- (5) "Charter school" means a publicly funded school that may be exempt from an assurance standard or a section of assurance standards as defined in ARM 10.55.602(3). A charter school operates under the supervision and control of an existing locally elected board of trustees in an existing public school district.
- (6) "Class 6 specialist" means a person with a Class 6 specialist license in a nonteaching role of school psychologist or school counselor.
- (7) "Community engagement" means the partnership between members of the community and schools that may share resources and volunteer to support student well-being and learning development.
- (8) "Comprehensive needs assessment" means a process that is used to identify district and school area(s) of need, the root causes of identified gaps, set priorities, and inform an action plan for improvement.
- (9) "Content standard" means what all students should know, understand, and be able to do in a specific content area.
- (10) "Corrective plan" means a systematic procedure and timeline for resolving deviations when a school has an accredited with probation status.
- (11) "Deviation" means a citation of noncompliance with any given standard.
- (12) "Digital content provider" means an entity, organization, or individual registered pursuant to ARM 10.55.907 offering K-12 educational content for distance, online, and technology-delivered programs and courses.

- (13) "Distance learning" means instruction in which students and teachers are separated by time, location, or both with synchronous or asynchronous content, instruction, and communication between student and teacher. This instruction may consist of learning opportunities provided through online (Internet-based) and other emerging technologies.
- (14) "Endorsement" means an official indication on a license of the subject area(s), specialized program area(s), or both for which the holder of the license is authorized to practice in Montana accredited schools.
- (15) "Facilitator" means the individual assigned to monitor distance, online, and technology-delivered learning programs pursuant to ARM 10.55.907. The facilitator may be an instructional paraprofessional as long as there is a licensed teacher providing the instruction.
- (16) "Family engagement" means a partnership with shared responsibility among families, educational staff, and community groups to promote each student's learning, well-being, and development of full educational potential during their entire K-12 experience.
- (17) "Graduate profile" means a learner centered model(s) based on a shared vision of learner attributes that students should have when they graduate.
- (18) "Graduation rate" means a calculation based on the four-year adjusted cohort graduation rate for all students and for each student group.
- (19) "Instructional paraprofessional" means school or district personnel whose positions are instructional in nature and who work under the direct supervision of licensed school personnel. The supervising licensed school personnel are responsible for:
  - (a) the design, implementation, and assessment of learner progress; and
  - (b) the evaluation of the effectiveness of learning programs and related services for children.
- (20) "Integrated strategic action plan" means a district plan adopted by the board of trustees that:
  - (a) is aligned with the peoples' goal in Article X, section 1 of the Montana Constitution of developing the full educational potential of each person;
  - (b) ensures a learner centered system and continuous improvement that reflects local context and needs;
  - (c) is based on school level comprehensive needs assessment;
  - (d) has engaged stakeholders and addresses stakeholder input and feedback; and
  - (e) aligns with requirements of applicable state and federal programs.

- (21) "Intensive assistance" means a required process for schools in accredited with probation status. Such schools have failed to develop or implement an approved corrective plan to remedy accreditation deviations within the designated timeline.
- (22) "Internship" as provided for in ARM 10.57.114 means an agreement between a fully licensed Class 1, 2, or 3 educator, the school district, and a Montana accredited educator preparation program. Internships are permitted in endorsement areas approved by the Board of Public Education in ARM 10.57.412 and 10.57.414 through 10.57.419.
- (23) "Learning model" means the learning experiences students engage in and teachers facilitate that are aligned to the desired attributes of a graduate profile.
- (24) "Learning progression" means the specific performance expectations in each content area and grade-level or grade-band from kindergarten through grade 12.
- (25) "Licensure" means a certificate issued or applied for under 20-4-101, et seq., MCA.
- (26) "Literacy" means constructing and validating knowledge in specific content areas which includes interpretation and learning with language, numeracy, and media .
- (27) "Measure" means a way to assess the level of proficiency on a performance indicator aligned to the district graduate profile.
- (28) "Middle grades" means grades 4 through 9.
- (29) "Minimum requirement" as used in ARM 10.55.606 means groups of 10 or more students for reporting valid and reliable results as it pertains to student performance .
- (30) "Nonlicensed" means a person who does not hold a current Montana educator license, except for a person for whom an emergency authorization of employment has been issued under the provisions of 20-4-111, MCA.
- (31) "Personalized learning" means to:
  - (a) develop individualized pathways for career and postsecondary educational opportunities that honor individual interests, passions, strengths, needs, and culture;
  - (b) support the student through the development of relationships among teachers, family, peers, the business community, postsecondary education officials, public entities, and other community stakeholders;
  - (c) embed community-based, experiential, online, and work-based learning opportunities; and
  - (d) foster a learning environment that incorporates both face-to-face and virtual connections.

- (32) "Principal" means a person who holds a valid Montana Class 3 educator license with an applicable principal endorsement and who is employed by a district as a principal, or who is enrolled in a Board of Public Education approved principal internship program under ARM 10.57.114.
- (33) "Professional development" means adult learning that increases educator effectiveness and learning outcomes for all students.
- (34) "Proficiency-based learning" means systems of instruction, assessment, and academic reporting that are based on students demonstrating that they have learned the knowledge and skills as outlined in the state content standards.
- (35) "Proficient" means that a student demonstrated a level of knowledge and skills that are expected to be learned signaling that a student is well prepared to progress on the learning continuum aligned to the content standards, learning progressions, and necessary readiness skills.
- (36) "Program area standards" means the subject matter Montana school districts are required to offer and the strategies and proven practices used to instruct. The program area standards include: English language arts, arts, health and physical education, mathematics, science, social studies, career and technical education, technology integration, computer science, library media and information literacy, world languages, and school counseling.
- (37) "Program delivery standards" means the conditions and practices school districts are required to provide ensuring that every student is afforded equal educational opportunities to learn, develop, and demonstrate achievement in content standards and content-specific grade-level or grade-band learning progressions.
- (38) "Pupil instruction" is as defined in 20-1-101, MCA .
- (39) "Pupil instruction day" means a school day of pupil instruction.
- (40) "Pupil instruction-related (PIR) day" means days of teacher activities devoted to improving the quality of instruction. The activities may include, but are not limited to: in-service training, attending state meetings of teacher organizations, and conducting parent conferences.
- (41) "School" means, for accreditation purposes, an educational program and grade assignments designated by the local board of trustees in one of the following categories:
  - (a) an elementary school, which offers any combination of kindergarten through eighth grade;
  - (b) a seventh and eighth grade school, which comprises the basic education program for grades 7 and 8 that may be funded at the high school rate pursuant to 20-9-306, MCA;

- (c) a junior high school, which offers the basic education program for grades 7 through 9;
  - (d) a middle school, which offers education programs for grades 4 through 8 or any combination thereof; and
  - (e) a high school, which offers the educational programs for grades 9 through 12 or grades 10 through 12 when operating in conjunction with a junior high school.
- (42) "School administrator" means a person who is a part of the school's administrative or supervisory staff and who holds a Class 3 license and is appropriately endorsed, or who is enrolled in a Board of Public Education approved administrator internship program under ARM 10.57.114.
- (43) "School district" means the territory, regardless of county boundaries, organized under the provisions of Title 20, MCA to provide public educational services under the jurisdiction of the local board of trustees. A high school district may encompass all or parts of the territory of one or more elementary districts. "School district" refers to all state-funded special purpose schools that are accredited under this chapter.
- (44) "School system" means the administrative unit of a district or combination of districts. In Montana, types of school systems are as follows:
- (a) "combined elementary-high school district" means an elementary district and a high school district which are combined into a single school system for district administration purposes through a K-12 district, unified school system, or joint board;
  - (b) "independent high school district" means a district organized for the purpose of providing public education for all or any combination of grades 9 through 12 that is operated independent of an elementary district; and
  - (c) "independent elementary school district" means a district organized for the purpose of providing public education for all or any combination of grades kindergarten through grade 8 that is operated independent of a high school district.
- (45) "Special education technician" means an individual that is certified under ARM 10.57.439 to work under the direction of the supervising special education teacher as defined in ARM 10.55.602(51), and provides services authorized in ARM 10.55.725.
- (4546) "Stakeholders" means community members who may be involved and invested in districts, schools, programs, and outcomes for students. Stakeholders include students, families, educators, leaders, business and community leaders, taxpayers, and the many partners who support them.



- (~~46~~47) "State accountability system"<sup>9</sup> means federally mandated academic measures and Montana defined flex indicator(s) within the annual meaningful differentiation process.
- (~~47~~48) "Student growth" means changes in student learning as measured from one point in time to another as determined by state or local measures, or both. The federal accountability system uses a growth model to demonstrate student learning across time as measured by statewide assessments.
- (~~48~~49) "Student performance standards" means the measurement of student performance and proficiency on annual state level summative assessments and graduation rates used to determine the accreditation status of a school.
- (~~49~~50) "Superintendent" means a person who holds a valid Montana Class 3 educator license, with an applicable superintendent's endorsement, or who is enrolled in a Board of Public Education approved superintendent internship program under ARM 10.57.114.
- (51) "Supervising special education teacher" means an individual who holds a current Class 1 or Class 2 teacher's license with a special education P-12 endorsement and supervises a special education technician as defined in ARM 10.55.602(45).
- (~~50~~52) "Synchronous" means occurring at the same time. "Synchronous" refers to instruction and communication between participants (i.e., students and teachers) that occurs at the same time even though they may be in different physical locations. For example, instruction in which students and teachers are online at the same time so that a question can be immediately answered.
- (~~51~~53) "Teacher" means a person, except a district superintendent, who holds a valid Montana educator license issued by the Superintendent of Public Instruction under the policies adopted by the Board of Public Education and who is employed by a district as a member of its instructional, supervisory, or administrative staff. This definition of a teacher includes a person for whom an emergency authorization of employment has been issued under the provisions of 20-4-111, MCA.
- (~~52~~54) "Technology-delivered learning" means instruction and content digitally delivered via technologies.
- (~~53~~55) "Variance to standard" means an alternate approach to meeting or exceeding the minimum standards.

**Authorizing statute(s):** Mont. Const. Art. X, sec. 9, 20-2-114, 20-2-121, 20-7-101, MCA

**Implementing statute(s):** Mont. Const. Art. X, sec. 9, 20-2-121, 20-3-106, 20-7-101, MCA

## **10.55.805 SPECIAL EDUCATION**

- (1) Each district shall provide educational programs and services to students eligible to receive special education services as identified under IDEA.
- (2) Each district shall comply with all federal and state laws and regulations addressing special education.
- (3) Each district shall provide structured support and assistance to regular education teachers in identifying and meeting the diverse needs of students receiving special education services.
- ~~(4) A student eligible to receive special education services as identified under IDEA and who has successfully completed the goals identified on an individualized education program for high school completion shall be awarded a diploma.~~

**Authorizing statute(s):** 20-2-114, MCA

**Implementing statute(s):** 20-2-121, MCA

### **ADOPT**

The rules proposed to be adopted are as follows:

## **NEW RULE 1 (10.55.725) SPECIAL EDUCATION TECHNICIAN**

- (1) Special education technicians, as defined in ARM 10.55.602 (45), shall be under the direction of the supervising special education teacher, as defined in ARM 10.55.602 (51), who is responsible for instruction and assessment of students with special needs.
- (2) Special education technicians, under the direct supervision of a licensed special education teacher may:
  - (a) schedule and coordinate special education meetings;
  - (b) collect, prepare, and organize student-specific data and information;
  - (c) deliver instruction in 1:1 and small group settings; and
  - (d) conduct district-level assessments and mandatory statewide assessments.
- (3) Special education technicians shall not:

- (a) create or develop documents related to the special education record, with the exception of the contact log;
- (b) conduct or interpret special education evaluations;
- (c) make independent decisions regarding a student's Individualized Education Program (IEP); or
- (d) conduct special education meetings.

**Authorizing statute(s):** Mont. Const. Art. X, sec. 9, 20-2-114, 20-2-121, 20-7-101, MCA

**Implementing statute(s):** Mont. Const. Art. X, sec. 9, 20-2-121, 20-3-106, 20-7-101, MCA

---

### **Small Business Impact**

The Board of Public Education adopts rules that primarily impact teachers, administrators, and school district operations. The board works in cooperation with public schools across the state to implement the rules that are adopted. Given that the board does not work directly with small businesses, the small business impact analysis performed as required under 2-4-111, MCA, indicates that no small businesses are likely to be directly impacted by the proposed rule changes.

---

### **Bill Sponsor Notification**

The bill sponsor contact requirements of 2-4-302, MCA, do not apply.

---

### **Interested Persons**

The board maintains a list of interested persons who wish to receive notices of rulemaking actions proposed by this agency. Persons who wish to have their name added to the list shall make a written request that includes the name, email, and mailing address of the person to receive notices and specifies for which program the person wishes to receive notices. Notices will be sent by email unless a mailing preference is noted in the request. Such written request may be mailed or delivered to the contact person above or may be made by completing a request form at any rules hearing held by the board.

---

### **Rule Reviewer**

McCall Flynn

**Approval**

Dr. Tim Tharp  
Board Chair



# Board of Public Education

## Board of Public Education Proposed Chapter 55 Rulemaking Timeline Accreditation Standards – Special Education Technician License

|                                                                                                            |                       |
|------------------------------------------------------------------------------------------------------------|-----------------------|
| Superintendent's Request to Revise ARM Title 10, Chapter 55                                                | November 19-21, 2025  |
| BPE authorization to publish Proposal Notice, including public hearing date                                | July 22-24, 2026      |
| BPE approves rulemaking timeline                                                                           | July 22-24, 2026      |
| Proposal Notice to SOS for publication in MAR                                                              | July 28, 2026         |
| MAR publication of Proposal Notice <ul style="list-style-type: none"> <li>Public comment begins</li> </ul> | August 7, 2026        |
| Public hearing date                                                                                        | September 1, 2026     |
| Final public comment deadline                                                                              | September 10, 2026    |
| Economic Impact Statement to Education Interim Budget Committee                                            | September 15-26, 2026 |
| Review Economic Impact Statement/Respond to comments                                                       | September 24-25, 2026 |
| BPE authorization to publish Adoption Notice                                                               | January 2027          |
| Adoption Notice to SOS for publication in MAR                                                              | January 2027          |
| MAR publication of Adoption Notice                                                                         | January 2027          |
| Effective date of rules                                                                                    | February 2027         |

*The Board of Public Education may revise the above dates, based on the requirements of the Montana Administrative Procedure Act and the rulemaking statutes.*

# **FUTURE AGENDA ITEMS September 24-25, 2026**

## **Glendive, MT**

Election of Board Officers  
Action on Strategic Planning Items  
MACIE Update  
Montana Digital Academy Update  
MACIE Renewal (Even Years)  
Review Community Choice School Academic Performance and Financial Reports  
*Annual HiSET Report*  
*Annual Special Education Report*  
*Accreditation Update*  
*Assessment Update*  
*Federal Update*  
*Content Standards Revision Update*