

# Community Choice Schools Commission

January 23, 2024  
Montana State Capitol Building, Room 152  
1301 E 6<sup>th</sup> Avenue, Helena, MT  
10:00 a.m. to 4:00 p.m.

## Agenda Packet Contents:

1. Consent Agenda: Minutes from 12.5.23
2. Proposed Agenda for 1.23.24
3. Reading Material:
  - a. Measuring Up To The Model: A Ranking of State Public Charter School Laws, 13<sup>th</sup> Edition 2022 by Todd Ziebarth  
National Alliance of Public Charter Schools
4. Reference Material:
  - a. Why Knowledge is a Dirty Word in K-12 (And What We Can Do About It) Bibliography by Ashley Rogers Berner,  
Johns Hopkins School of Education, Institute for  
Education Policy
5. Proposed Donor Submission Form
6. CCSC Internal Communications Plan: Donor Intake Process
7. 2023 BPE Revenue Received Policy
8. 2023 Revenue Internal Controls Policy
9. Fillable Meeting Evaluation Form

**Community Choice Schools Commission**  
**Meeting Minutes**  
December 5, 2023  
Montana State Capitol Building, Room 102  
1301 E 6th Avenue, Helena, MT

**Call to Order**

Chair Schreiber called the meeting to order at 10:01 AM. The Chair led the Commission in the Pledge of Allegiance and Kris Stockton took Roll Call. The Chair read the Statement of Public Participation and welcomed guests.

Commission members present: Trish Schreiber, Chair; Katy Wright, Vice Chair; Jon Rutt, Treasurer; Dee Brown; Cathy Kincheloe; Katey Franklin. Board of Public Education (BPE) staff present: McCall Flynn, Executive Director; Kris Stockton, Administrative Specialist.

Presenters: Dr. Matt Ladner, EdChoice; Natalie Peeterse, Department of Administration (DOA) Procurement Bureau; Anna Lubick, DOA Procurement Bureau; Marc Carignan, CFO Bluum; Terry Ryan, CEO Bluum.

Guests: Dylan Klapmeier, Governor Gianforte's Office; Christy Mock-Stutz, Office of Public Instruction (OPI); Kimberly Evans, OPI; Judy Territo (Zoom); Jane Hamman, BPE Member; Patrick Webb, Montana Family Foundation; Rita Schreiber, Educational Promise Foundation; Heather Irving; Jenny Murnane Butcher, Montanans Organized for Education.

**Item 1            Approve Consent Agenda 10:03:56**

*Member Brown moved to approve the Consent Agenda as presented. Motion seconded by Member Rutt.*

*No discussion. Motion passed unanimously.*

**Approve Agenda 10:04:28**

*Vice Chair Wright moved to adopt the agenda as presented. Motion seconded by Member Brown.*

*No discussion. Motion passed unanimously.*

**Item 2            Chairperson Welcome Statement 10:05:05**

Chair Schreiber opened the meeting by welcoming members and guests and thanking Board of Public Education staff for their work supporting the Commission. The Chair briefly discussed meeting procedures before welcoming newest member Dr. Katey Franklin to the meeting. Dr. Franklin introduced herself to the Commission.

**Item 3            Discussion/Presentation: State Procurement Laws presented by Anna Lubick and Natalie Peeterse of the State Procurement Bureau of The Department of Administration 10:08:31**

Anna Lubick and Natalie Peeterse, State Procurement Bureau, gave a presentation on State Procurement law, levels of procurement, when a Limited Solicitation or Request for Proposal is necessary, and the Procurement Lifecycle, before answering Commission member questions.

**Item 4            Discussion/Presentation: Dr. Matt Ladner, Senior Fellow EdChoice: Rustic Renaissance, lecture and Q&A 10:55:35**

Chair Schreiber introduced Dr. Matt Ladner to the Commission for a presentation on the positive effects of school choice policies for rural districts in Arizona. Dr. Ladner discussed his research of increasing rural NAEP and rural academic growth scores in Arizona over the past 30 years since the advent of open enrollment and charter schools, how school choice programs are structured in Arizona, how charter schools have developed in and near rural areas, legal challenges experienced, and how they were overcome. Dr. Ladner answered Commission members questions and questions from the public. Discussion points varied in topic between: school choice effects on teens with depression, cultural and socioeconomic integration in charter schools, advantages and disadvantages of elected vs. appointed school boards, the importance of school board transparency, assessments as an indicator for performance, union opposition to school choice policies in Arizona, the role and development of charter support associations, complications related to transportation, and that the authorizers in AZ include: a statewide Charter School Board, traditional districts, and universities.

**Item 6            Discussion/Presentation: Marc Carignan, CFO Bluum, A Glimpse at Section 15 Funding of CCSA; Terry Ryan, CEO Bluum, The Role of Philanthropy and the Charter School Program Grant, lecture and Q&A 13:18:32**

Chair Schreiber introduced Marc Carignan and Terry Ryan from Bluum, a Charter Support Organization (CSO) based out of Boise, Idaho. Mr. Ryan discussed charter schools in Idaho, the evolution of legislation pertaining to charter schools over past 25 years and different types of charter schools in operation in Idaho and how Bluum supports growth of high-quality charter seats. Mr. Ryan answered Commission member questions pertaining to how Bluum supports special education students' needs via charter schools and access to Medicaid benefits, charter-school teacher credentialing, the trust lenders and investors have with the NWEA MAP performance data, and how high school sports are handled in Idaho. Mr. Carignan discussed funding, types of funding charter schools in Idaho receive, and work done by Bluum to secure funding for charter schools. Mr. Carignan discussed hypothetical situations of choice school funding in Montana, how founders must creatively approach their school models to compensate for lack of equal funding (facility and transportation, specifically), and the necessity to philanthropically secure additional money for charter school start-ups. Mr. Carignan noted that start-up is the most vulnerable stage, and ideally choice schools would sustain themselves with public money by year 5. Members presented questions regarding fundraising, facilities, building partnerships between districts and charter schools, managing tensions between unions and politics in general, distribution of assets should a school fail, and charter school teacher retention rates in Idaho along with parental satisfaction. Mr. Ryan concluded with remarks about the importance of national partnerships to create a healthy choice charter school sector. Lastly, Mr. Ryan shared about how Idaho has now received two Federal CSP grants totaling almost \$50M

since 2018 used almost exclusively to open, expand or replicate new charter schools and to improve the data infrastructure for authorizing systems. .

**Item 5 Discussion: Shall the Commission form any committees at this time other than the standing Executive Committee? 15:35:36**

Member Brown asked if the financial components have been set up so that the Commission can take donations. Chair Schreiber noted that the account has been established to accept donations from private entities and that logistical pieces are being finalized. Member Rutt noted that a draft form for donations is being worked on. Member Brown asked how to direct people to the recorded meetings and the Chair noted that they are posted on the BPE webpage and the Legislative Services webpage. Member Rutt noted that members should keep track of any expenses they have incurred to turn in receipts to Member Rutt to be reimbursed once funding is available. If members choose not to be reimbursed and would rather donate their expenses as charitable for tax purposes, members should keep track of expenses so that the Commission can acknowledge their donation. Ms. Flynn asked members what else they need from the Board to be ready to accept donations, and the Chair stated that she is waiting for some information from the Lt. Governor and Budget Office about an official recognition letter. Discussion ensued as to whether individuals can donate or only private entities, and whether an individual is considered a private entity. Members determined that no additional committees are needed at this time.

**Future Agenda Items 15:51:52**

Presentation from OPI

Presentation from people interested in opening Choice Schools

**Public Comment 16:03:32**

No public comment.

**Adjourn**

The Commission meeting adjourned at 4:04 PM.

# Community Choice Schools Commission

## Meeting Agenda

January 23, 2024

Montana State Capitol Building, Room 152

1301 E 6<sup>th</sup> Avenue, Helena, MT

10:00 a.m. to 4:00 p.m.

	<b>Estimated Time</b>	<b>Details</b>
<b>Call to Order</b>	10:00 a.m.	<ol style="list-style-type: none"> <li>1. Pledge of Allegiance</li> <li>2. Roll Call</li> <li>3. Statement of Public Participation</li> <li>4. Welcome Visitors</li> </ol>
<b>Note to the Public</b>		<ol style="list-style-type: none"> <li>1. Action may be taken on any item listed on the Choice Commission agenda. Per §2-3-103 MCA, <i>the Choice Commission encourages public comment on any item prior to final action.</i></li> <li>2. All times are approximate and may change as reasonably necessary.</li> </ol>
<b>Agenda</b>		
Item 1	10:05 a.m.	<ul style="list-style-type: none"> <li>◇ Action: Consent Agenda Adoption: Minutes from 12/5/23</li> <li>◇ Action: Agenda Adoption for 1/23/24</li> </ul>
Item 2	10:10 a.m.	Chairperson Welcome Statement
Item 3	10:10 a.m.	Discussion/Presentation: Don Harris, Chief Legal Counsel Dept. of Administration Rulemaking
Item 4a	11:00 a.m.	Discussion/Presentation: Lisa Grover, Ph.D., Senior Director of State Advocacy, National Alliance of Public Charter Schools; <i>Measuring Up to the Model.</i>
Item 4b	12:00 p.m.	Discussion: Jim Goenner, National Charter School Institute; <i>Implementation</i>
<b>Recess</b>	<b>12:30 p.m.</b>	Recess: lunch and snacks will be provided to all those in attendance
Item 5	1:00 p.m.	Discussion/Presentation: Dr. Ashley Rogers Berner, Johns Hopkins Institute for Education Policy: <i>Education Pluralism in America.</i>
Item 6	3:00 p.m.	<ul style="list-style-type: none"> <li>◇ Action: Formation of Subcommittees</li> <li>1. Shall the Commission form any committees at this time other than the standing Executive Committee?</li> <li>◇ Action: Request to BPE</li> <li>1. Shall the Commission send request to BPE for communication process in relation to donations?</li> </ul>
Item 7 <b>Future Agenda Items</b>	3:15 p.m.	Discussion: <ol style="list-style-type: none"> <li>1. Are there any requests for speakers or organizations that members would like to have present at our upcoming meetings?</li> </ol>
<b>Public Comment</b>	3:30 p.m.	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 <a href="mailto:bpe@mt.gov">bpe@mt.gov</a> to request the Zoom link for the meeting. Written public comment may be submitted to the Executive Director of the BPE at <a href="mailto:bpe@mt.gov">bpe@mt.gov</a> and will be shared with the Commission members and included as part of the official public record.
<b>Adjourn</b>	4:00 p.m.	
<b>Note to the Public</b>		<p>**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 end of each meeting.</p> <p>**The Choice Commission 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: <a href="mailto:kmstockton@mt.gov">kmstockton@mt.gov</a> or phone at 406-444-0302.</p>

# MEASURING UP TO THE MODEL

## A RANKING OF STATE PUBLIC CHARTER SCHOOL LAWS

THIRTEENTH EDITION, JANUARY 2022



NATIONAL ALLIANCE FOR  
**PUBLIC  
CHARTER  
SCHOOLS**

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### TODD ZIEBARTH

NATIONAL ALLIANCE FOR  
PUBLIC CHARTER SCHOOLS









## INTRODUCTION

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2021 was a remarkable year in many ways for the charter school sector. While the nation continued struggling through the COVID-19 pandemic, PreK-12 education emerged as a critical issue across the country. For the first time, an overwhelming number of families were frustrated with public education and months of uncertainty left them open to exploring new educational options. The result: 1.4 million students left district schools and a record number of new students enrolled in charter schools. Meanwhile state legislators made bold changes to charter laws to meet the demand for even more high-quality public education options.

More than 50% of the states and territories with charter laws gained legislative ground last year, resulting in some of the most significant changes ever seen in a single year. 2021 was widely recognized as the year of public school choice in state capitols across the country.

When state legislatures convened for their sessions in 2021, the country was in the middle of the second school year impacted by the COVID-19 pandemic. By this time, many families and lawmakers were growing weary with the inadequate responses to the pandemic by too many district administrators, school board members, and special interest groups. Families were desperate for more educational options. Hearing their cries, lawmakers in state after state made significant improvements to their charter school laws, creating more fertile ground for these unique public schools. These improvements had a major impact on our annual ranking of state charter school laws. Champions for educational options from both sides of the political aisle found opportunities to introduce charter school bills in several states, resulting in new laws that permitted charter schools in states that previously did not allow them, eliminated geographic restrictions, improved funding equity, increased or removed caps on growth, and created funding for facilities.

For 13 years, the National Alliance has compiled a review of the strength and sustainability of all the charter school laws in the country and compared them to a strong model law that is comprised of 21 essential components focused on flexibility, accountability, and equity. The 2022 rankings also reflect the continued steps many states took in 2021 to strengthen their laws and foster a landscape of high-quality charter public schools that have a positive impact on students.

As we continue to navigate some of the most challenging political terrain that charter schools have ever faced, we hope this report helps charter school supporters defeat harmful bills while boosting their efforts to create more educational opportunities for America's students.

Nina Rees  
President and CEO

Todd Ziebarth  
Senior Vice President of  
State Advocacy and Support



## KEY TAKEAWAYS

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Some key takeaways from this year's rankings include:

- ▶ **Florida** cracked the Top 5, moving from #7 to #5 because they passed a law that expanded the types of entities that could be authorizers. Notably, post-secondary institutions are now included.
- ▶ **Nevada** moved into the Top 10, improved from #11 to #9, largely due to increased transparency and accountability.
- ▶ **Ohio** jumped from #24 to #12 after making another round of policy improvements to its law, including removing geographic restrictions on where a charter school can be started.
- ▶ **Iowa** was the most improved state, leaping from #41 to #18 after enacting an overhaul to its charter school law. Major improvements included strengthened authorizing and enhanced autonomy and accountability.
- ▶ **West Virginia** moved from #32 to #28 after improving its authorizing and caps policies. Although the state still has a cap on the number of charter schools allowed, there is now additional space for more schools under the cap. West Virginia also created a new authorizing entity, their state charter board.
- ▶ **Wyoming** moved from #42 to #34 after making some major improvements to its law. In fact, Wyoming saw the second biggest jump in its score after Iowa. This is largely due to creating a new state authorizer.
- ▶ **Nine states** improved their rankings from 2021. (Alabama, Florida, Iowa, Nevada, New Hampshire, Ohio, Oklahoma, West Virginia, and Wyoming)
- ▶ **Fourteen states** improved their scores from 2021. (Alabama, Florida, Hawaii, Illinois, Iowa, Michigan, Missouri, Nevada, New Hampshire, New Jersey, Ohio, Oklahoma, West Virginia, and Wyoming)
- ▶ The new **Top Five states** are Indiana (for the seventh year in a row), Colorado, Alabama (up from #5), Minnesota, and Florida (up from #7).
- ▶ The new **Bottom 5 states** are Wisconsin, Virginia, Alaska, Kansas, and Maryland. These states round out the bottom because neither of them provide schools much in the way of autonomy, accountability, funding equity for students and alternative, non-district authorizers.

This report is the thirteenth annual state charter school laws rankings report produced by the National Alliance. In each report, we analyze, score, and rank each state's charter school law against our model charter school law. The purpose is to determine which states have created the statutory and regulatory environments that best support high-quality public charter schools. On two occasions, we also produced reports that explore the impact of these environments on the growth, innovation, and quality of a state's public charter schools.

This year's state charter school laws rankings report represents the final one within this framework. In 2022, we plan to revisit the model law itself, and rethink the criteria and data the rankings report is based upon. We also plan to create a new approach for evaluating state charter school movements, one that will likely encompass both a state's statutes and regulations as well as the impacts of those policies.

TABLE 1: 2022 STATE PUBLIC CHARTER SCHOOL LAW RANKINGS

RANKING	STATE	SCORE
1	Indiana	181
2	Colorado	181
3	↑2 Alabama	180 ↑3
4	Minnesota	178
5	↑2 Florida	175 ↑6
6	↓3 Washington	173 ↓6
7	↓1 Mississippi	169
8	Louisiana	168
9	↑3 Nevada	168 ↑2
10	↓1 Maine	167
11	↓1 D.C.	166
12	↑12 Ohio	165 ↑12
13	↓1 Massachusetts	162
14	↓1 Arizona	160
15	↓1 North Carolina	160
16	↓1 Delaware	160
17	↓1 Georgia	158
18	↑23 Iowa	157 ↑68
19	↑3 Oklahoma	157 ↑4
20	↑3 New Hampshire	157 ↑4
21	↓4 Idaho	157
22	↓4 New York	156
23	↓4 South Carolina	155

RANKING	STATE	SCORE
24	↓4 California	154
25	↓4 Utah	154
26	↓1 Tennessee	153
27	Missouri	153 ↑6
28	↑4 West Virginia	152 ↑18
29	↓3 New Mexico	152
30	↓2 Michigan	149 ↑2
31	↓1 Hawaii	147 ↑4
32	↓3 Texas	145
33	↓2 Arkansas	141
34	↑8 Wyoming	136 ↑49
35	↓1 New Jersey	135 ↑4
36	↓3 Oregon	131
37	↓2 Pennsylvania	131
38	Illinois	127 ↑3
39	↓3 Connecticut	126
40	↓3 Rhode Island	126
41	↓2 Wisconsin	109
42	↓2 Virginia	94
43	Alaska	83
44	Kansas	69
45	Maryland	61

NOTE: THE TOTAL POINTS POSSIBLE IS 240.

## ESSENTIAL COMPONENTS OF A STRONG PUBLIC CHARTER SCHOOL LAW

In this report, we evaluate each state’s public charter school law against the 21 essential components of a strong charter school law. These 21 components are drawn from the National Alliance’s *A New Model Law for Supporting the Growth of High-Quality Public Charter Schools: Second Edition*. Table 2 lists the 21 essential components and a brief description of each.

### MEASURING UP TO THE MODEL

**TABLE 2: ESSENTIAL COMPONENTS OF A STRONG PUBLIC CHARTER SCHOOL LAW**

#	ESSENTIAL COMPONENT
1	<b>No Caps</b> on the growth of charter schools in a state.
2	<b>A Variety of Charter Schools Allowed</b> , including new startups and public school conversions.
3	<b>Non-district Authorizers Available</b> , to which charter applicants may directly apply.
4	<b>Authorizer and Overall Program Accountability System Required</b> , whereby all authorizers must affirm interest to become an authorizer (except for a legislatively created state charter school commission) and participate in an authorizer reporting program based on objective data, as overseen by some state-level entity with the power to sanction.
5	<b>Adequate Authorizer Funding</b> , including provisions for guaranteed funding from the state or authorizer fees and public accountability for such expenditures.
6	<b>Transparent Charter School Application, Review, and Decision-making Processes</b> , including comprehensive academic, operational, and governance application requirements, with such applications reviewed and acted on following professional authorizer standards.
7	<b>Performance-based Charter School Contracts Required</b> , with such contracts created as separate post-application documents between authorizers and charter schools detailing academic performance expectations, operational performance expectations, and school and authorizer rights and duties.
8	<b>Comprehensive Charter School Monitoring and Data Collection Processes</b> so that all authorizers can verify charter school compliance with applicable law and their performance-based contracts.
9	<b>Clear Processes for Renewal, Nonrenewal, and Revocation Decisions</b> , including school closure and dissolution procedures to be used by all authorizers.
10	<b>Transparency Regarding Educational Service Providers</b> , provided there is a clear performance contract between an independent charter school board and the service provider and there are no conflicts of interest between the two entities.
11	<b>Fiscally and Legally Autonomous Schools with Independent Charter School Boards</b> , whereby charter schools are created as autonomous entities with their boards having most of the powers granted to traditional school boards.
12	<b>Clear Student Enrollment and Lottery Procedures</b> , which must be followed by all charter schools.



## MEASURING UP TO THE MODEL

TABLE 2: ESSENTIAL COMPONENTS OF A STRONG PUBLIC CHARTER SCHOOL LAW

#	ESSENTIAL COMPONENT
13	<b>Automatic Exemptions from Many State and District Laws and Regulations</b> , except for those covering health, safety, civil rights, student accountability, employee criminal history checks, open meetings, freedom of information requirements, and generally accepted accounting principles.
14	<b>Automatic Collective Bargaining Exemption</b> , whereby charter schools are exempt from any outside collective bargaining agreements, while not interfering with laws and other applicable rules protecting the rights of employees to organize and be free from discrimination.
15	<b>Multi-school Charter Contract and/or Multi-charter School Contract Boards Allowed</b> , whereby an independent charter school board may oversee multiple schools linked under a single charter contract or may hold multiple charter contracts.
16	<b>Extracurricular and Interscholastic Activities Eligibility and Access</b> , whereby (a) charter school students and employees are eligible for state- and district-sponsored interscholastic leagues, competitions, awards, scholarships, and recognition programs to the same extent as district public school students and employees; and (b) students at charter schools that do not provide extracurricular and interscholastic activities have access to those activities at district- public schools for a fee via a mutual agreement.
17	<b>Clear Identification of Special Education Responsibilities</b> , including clarity on which entity is the local education agency responsible for such services and how such services are to be funded (especially for low-incident, high-cost cases).
18	<b>Equitable Operational Funding and Equal Access to All State and Federal Categorical Funding</b> , flowing to the school in a timely fashion and in the same amount as district schools following eligibility criteria similar to all other public schools.
19	<b>Equitable Access to Capital Funding and Facilities</b> , including multiple provisions such as facilities funding, access to public space, and access to financing tools.
20	<b>Access to Relevant Employee Retirement Systems</b> , with the option to participate in a similar manner as all other public schools.
21	<b>Full-time Virtual Charter School Provisions</b> , including specific provisions regarding authorizing structure, enrollment criteria, enrollment levels, accountability for performance, funding levels based on costs, and performance-based funding.

## METHODOLOGY

### WEIGHTS

For our analysis comparing each state’s charter school law with the National Alliance for Public Charter Schools’ model law, we first weighted each of the model law’s 21 essential components with a weight from 1 to 4.

WEIGHTS	ESSENTIAL COMPONENTS
4	Transparent Charter Application, Review, and Decisionmaking Processes
	Performance-based Charter School Contracts Required
	Comprehensive Charter School Monitoring and Data Collection Processes
	Clear Processes for Renewal, Nonrenewal, and Revocation Decisions
	Equitable Operational Funding and Equal Access to All State and Federal Categorical Funding
	Equitable Access to Capital Funding and Facilities
3	No Caps
	Non-district Authorizers Available
	Authorizer and Overall Program Accountability System Required
	Fiscally and Legally Autonomous Schools with Independent Charter School Boards
	Automatic Exemptions from Many State and District Laws and Regulations
	Automatic Collective Bargaining Exemption
	Full-time Virtual Charter School Provisions
2	A Variety of Charter Schools Allowed
	Adequate Authorizer Funding
	Transparency Regarding Educational Service Providers
	Clear Student Enrollment and Lottery Procedures
	Multischool Charter Contracts and/or Multi-charter School Contract Boards Allowed
	Clear Identification of Special Education Responsibilities
	Access to Relevant Employee Retirement Systems
1	Extracurricular and Interscholastic Activities Eligibility and Access

This edition of Measuring Up to the Model: A Ranking of State Charter Public School Laws is the thirteenth one produced by the National Alliance for Public Charter Schools. For more information on our methodology, please visit <https://www.publiccharters.org/our-work/charter-law-database>



## **ACKNOWLEDGMENTS**

This report was written by Todd Ziebarth, senior vice president of state advocacy and support at the National Alliance for Public Charter Schools. We shared draft analyses with individuals in the jurisdictions in this report, including individuals working at state departments of education, state public charter school associations and resource centers, and other organizations. We want to acknowledge and thank them for their invaluable feedback. Any remaining errors and omissions in the state analyses and rankings are the responsibility of the author, not the reviewers from the states.





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# Why “Knowledge” is a Dirty Word in K-12 (And What We Can Do About It)

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Dr. Ashley Rogers Berner

Website: <https://edpolicy.education.jhu.edu/>

\*Particularly strong and/or important.

## Historical and Cultural Backdrop

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**COMMUNITY CHOICE SCHOOLS COMMISSION  
DONATION FORM**

**Please send donations, along with this completed form, to:**

Montana Board of Public Education  
PO Box 200601  
Helena, MT 59620-0601

**Checks must be made payable to:** Board of Public Education. All donations will be credited to the Community Choice Schools Account established and administered pursuant to Mont. Code Ann. § 20-11-126. Funds will be used by the Commission solely for public purposes consistent with the Community Choice Schools Act, Mont. Code Ann. §§ 20-11-101 et seq. Currently the Commission is only accepting donations from private entities and will not accept donations from individuals or public entities. The source of funds donated by a private entity must be from a private source (such as individual contributions) and not from a public source (such as a grant from a government agency). Donations may be deductible under Internal Revenue Code Section 170. Donors should seek the advice of a tax advisor.

Name of Donor Organization	Contact Person at Organization
Mailing Address	City, State, Zip Code
Email	Phone Number
\$ Amount of Donation	

I certify on behalf of the donor organization that it is a private entity and not an individual or public entity. I further certify that the funds donated by the donor organization are from a private source and not from a public source.

Signature of Donor Organization Representative	Date
Printed Name: _____	
Title: _____	

**Community Choice Schools Commission**  
Internal Communication Plan

**Donation Intake Process**

1. Before Donation is Received:
  - a. The Commission Treasurer will alert the BPE Staff of the expectation of an in-coming donation.
  - b. Responsible Party: Choice Commission Treasurer
2. Donation's Arrival at BPE:
  - a. Upon the donation's arrival, BPE staff will follow their Revenue/Accounts Receivable Internal Control Plan
  - b. Responsible Party: BPE Staff
3. Donation Communication between BPE and Commission:
  - a. BPE Staff will notify Commission Treasurer by email and copy Commission Chairperson of completed deposit process.
  - b. The email will provide:
    - i. the donor's name, address, email address and phone number;
    - ii. the amount donated;
    - iii. the date received by BPE staff; and,
    - iv. the date funds are available for use.
  - c. Responsible Party: BPE Staff
4. Donation Recognition Letter:
  - a. The Treasurer will send a Donation Recognition Letter to the donor including:
    - i. the donor entity's name;
    - ii. the amount donated;
    - iii. the date deposited; and,
    - iv. recognition of any limitations put on the donation.
  - b. Responsible Party: Commission Treasurer
5. Thank You Letters:
  - a. A Commission member and/or the Commission Chair will individually send a personalized thank you letter to the donor.
  - b. Responsible Party: Commission member and/or Commission Chair
6. Documentation Storage:
  - a. The Commission Chairperson will provide the BPE staff with digital copies of all letters sent by the Commission to the donor, including letters of solicitation;
    - i. Responsible Party: Commission Chairperson
  - b. Simultaneously, the BPE staff will save and file all documentation obtained during the donation intake process pursuant to their internal records retention policies;
    - i. Responsible Party: BPE staff

**BOARD OF PUBLIC EDUCATION**  
Revenue Receipt Policy

SUBJECT: State Special Revenue Accounts  
Policy: Revenue Receipt  
**Adopted:** October 2023

**Policy**

The Board of Public Education follows MOM Policy 325 on Cash Accounts and Deposits.

The Revenue Receipts Log and the deposit lockbox are maintained in the file room. Mail is opened by BPE staff assigned and trained to do so. If mail that belongs to another agency is delivered to the BPE office, mail staff redirects the mail to the appropriate agency. If it is not discovered that cash or checks belong to another agency until it is opened, the item will be forwarded to the correct entity by the most secure method available.

When cash or checks are received for the Board of Public Education, the first step is for mail staff to use the "RECEIVED" date stamp to emboss the envelope and form accompanying the funds with the day's current date. The employee then stamps the back of the check with the agency's endorsing stamp and enters the donation into the Revenue Receipts Log. The donation is then either securely stored in the office lockbox to be processed on the BPE accountant's next working day or passes the deposit to the accountant to be processed immediately. Revenue received will be deposited within one week of receipt. The accountant will properly show the movement of funds in the Revenue Receipts Log, indicating the assigned deposit number and showing proper transfer of custody into their possession with their signature. All funds received are processed according to State of Montana Fiscal Policies (Montana Operations Manual Policy 325-Cash Accounts & Deposits) for deposit into the State Treasury bank code 028 by the Board of Public Education business unit 51010.

**CASH:** The BPE accountant will prepare a Treasury Deposit Ticket for the cash and follow state accounting guidelines at the time. The deposit individually lists the Payor of each cash donation. The accountant will hand-deliver the cash and deposit ticket to US Bank at 302 N Last Chance Gulch for deposit into the State Treasury. After the deposit is made, the accountant will create an Accounts Receivable entry in SABHRS in correspondence with the deposit. Next, the SABHRS deposit is passed to BPE Administrative Specialist for review and verification that the deposit number was recorded in the Revenue Receipts Log, properly deposited in the treasury, and recorded in SABHRS. All SABHRS AR entries and supporting information will be filed with a copy of the SABHRS deposit reports in the office share drive. At least quarterly, BPE Executive Director will verify that all entries in the Revenue Receipts Log have been manually deposited with State Treasury.

**CHECKS:** The BPE accountant will prepare a Treasury Deposit Ticket for check(s) and follow state accounting guidelines at the time. The deposit individually lists the Payor of each check. The BPE Accountant will hand-deliver the check(s) and deposit ticket to US Bank at 302 N Last Chance Gulch for deposit into the State Treasury. After the deposit is made, the accountant will create an Accounts Receivable entry in SABHRS in correspondence with the deposit. Next, the



SABHRS deposit is passed to BPE Administrative Specialist for review and verification that the deposit number was recorded in the Revenue Receipts Log, properly deposited with the treasury, and recorded in SABHRS. All SABHRS AR entries and supporting information will be filed with a copy of the SABHRS deposit reports in the office share drive. At least quarterly, BPE Executive Director will verify that all entries in the Revenue Receipts Log have been manually deposited with State Treasury.

Note: Due to the small staff size of the Board of Public Education, the office recognizes a risk from a lack of separation of duties between receipt, deposit, and recording into the accounting records. This risk is mitigated by the extremely low volume of cash items being received. Staff members also do not use cash to reimburse the office for expenditures nor use it for any purchases.

**BOARD OF PUBLIC EDUCATION**  
Revenue/Accounts Receivable Internal Control Plan

SUBJECT: State Special Revenue Accounts  
Policy: Revenue/Accounts Receivable Internal Controls  
Adopted: October 2023

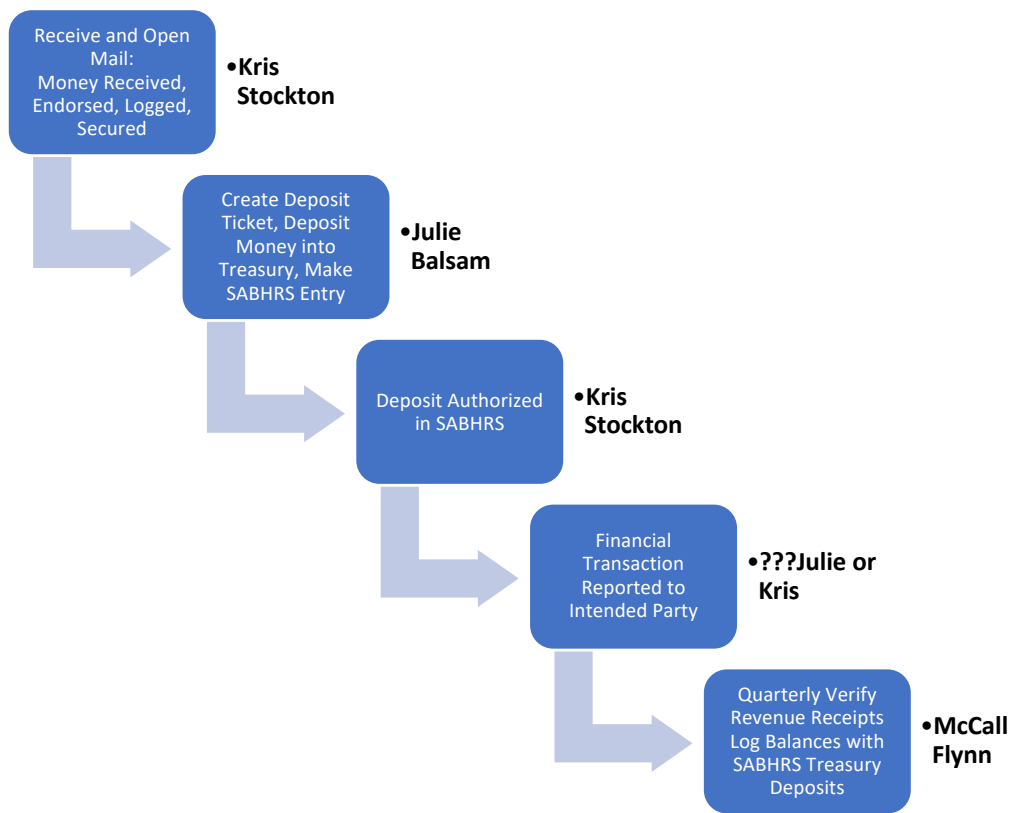
**Policy**

The Board of Public Education maintains internal control functions that provide management data concerning the adequacy and effectiveness of the Agency’s internal controls and the quality of operating performance compared to established standards and management expectations. The Board complies with the Montana Operations Manual (MOM) 399, Internal Control Guidebook.

**A. Responsible Parties**

- McCall Flynn, Executive Director
- Kris Stockton, Administrative Assistant
- Julie Balsam, Accounting Technician

**B. Transaction Cycles**



**C. Internal Control**

The Executive Director will act as the Board’s Internal Control Officer. The Internal Control Officer’s function is to provide reasonable assurance that the objectives of reliable financial reporting, effective and efficient operations, and compliance with laws and regulations are achieved. The process encompasses the control environment, the analysis of risks, control activities, information, and communications within and outside the organization, and monitoring of the process over time.

**D. The Internal Controls Officer will ensure:**

- That all written documentation of the Board's internal control systems is on file and accessible by agency's personnel and auditors;
- That the Board's internal control systems are evaluated at least annually or more often as conditions warrant;
- That the results of audits and recommendations to improve the Board's internal controls are promptly evaluated by all employees and that appropriate measures are implemented on a timely basis; and
- That all actions, determined by the Board as necessary to correct or otherwise resolve matters, will be addressed.

## Community Choice Schools Commission Meeting Evaluation

Name:

Meeting Date:

Please rate the following statements on a 1 to 5 scale according to:

- 5= strongly agree
- 4= agree
- 3= neutral
- 2= disagree
- 1= strongly disagree

Statements	5	4	3	2	1
The Commission meeting materials prepared me well for the meeting.					
I received the agenda packet in time to prepare for the meeting.					
Commission members came prepared to the meeting and ready to conduct business.					
The meeting was well facilitated.					
We focused most of our time on that which is most important.					
We used our time in the meeting room well today.					

The best part of the Commission meeting today was:

The meeting could have been better if we: