



**MONTANA
COMMUNITY
CHOICE SCHOOLS**

Montana Community Choice Schools Commission Meeting

December 9, 2025
9:00 a.m. to 11:15 a.m.

Zoom

Join from computer:

<https://mt-gov.zoom.us/j/89842259227?pwd=fBbM9YG1WwvlqGXmg6ATmGxnT3HjC0.1>

Webinar ID: 898 4225 9227

Passcode:169646

Join by phone:

Dial: +12133388477

Webinar ID: 898 4225 9227

Passcode:169646

Agenda Packet Contents:

1. Draft Minutes from 9.9.25
2. Draft Minutes from 10.10 and 10.11.25
3. Proposed Agenda for 12.9.25
4. Commission Core Values
5. Conflict of Interest Statements
6. Application Proposal Review Policy
7. Founder Proposed School Application Guidebook
8. Commission Member Application Guidebook
9. CCS Annual Report Template
10. Authorizer Annual Report Criteria and Template
11. Commission Annual Report Template
12. Member Expense Approval Policy
13. Treasurer's Report Materials



**MONTANA
COMMUNITY
CHOICE SCHOOLS**

Community Choice Schools Commission

Meeting Minutes

September 9, 2025

Zoom Webinar

Call to Order – (Recording Time Stamp) 00:00:15

Chair Schreiber called the meeting to order at 8:13:42 a.m. The Chair led the Commission in the Pledge of Allegiance, Cathy Kincheloe took Roll Call, and the Chair read the Statement of Public Participation and welcomed guests.

Commission members present: Trish Schreiber, Chair; Jon Rutt, Treasurer; Katy Franklin; Chip Lindenlaub; Taylor Ramos; Commission Director of Planning, Cathy Kincheloe; Board of Public Education (Board) staff present: McCall Flynn, Executive Director, and Kris Stockton, Administrative Specialist.

Presenters: Alyson Murphy and Stephanie McKean, National Charter School Institute; Gina Post, Jay Whalen, and Elisa Westapher, National Association of Charter School Authorizers.

Guests: Mark Casazza, Lea Ann Munkres.

Public Comment – 00:03:11

Mark Casazza provided updates on the development of the Great Adventure Academy program. Board of Public Education Executive Director Flynn introduced the new Program Manager for the Public Charter Schools, Lea Ann Munkres.

Item 1 **Approve Consent Agenda** – 00:04:54

Member Franklin moved to approve the Consent Agenda containing the June 17, 2025 Minutes. Motion seconded by Member Rutt.

No discussion. Motion passed unanimously.

Approve Agenda – 00:05:57

Member Rutt moved to adopt the agenda for September 9, 2025. Motion seconded by Member Lindenlaub.

No discussion. Motion passed unanimously.

Item 2 **Chairperson Welcome Statement** - 00:06:50

Chair Schreiber opened the meeting thanking Members and Guests for their participation in the meeting then proceeded with an overview of the day's training presentations pertaining to the Commission's role to responsibly authorize Community Choice Schools. Chair Schreiber encouraged Members and the public wanting more training to view past meetings which are all posted on the Board of Public

Education's website. It was noted that this meeting commemorates two years of the Commission's existence.

Item 3 New Member Introductions - 00:08:33

Chair Schreiber first thanked inaugural Commission Member Dee Brown for her service to the Commission and improving opportunities for public education in Montana. The chair welcomed Chip Lindenlaub as a Member, appointed by the President of the Senate for a three-year term. Member Lindenlaub thanked Senate President Regier and elaborated his support for education and his role in bringing chartering to Montana. The chair welcomed Taylor Ramos, appointed by the Governor, to fill the seat vacated by former Member Cathy Kincheloe for the remainder of the term through August 2027. Member Ramos shared her desire to bring more quality education options to the young people of Montana.

Item 4 Reports – 00:14:26

Member Rutt presented the Treasurer Report and noted the balance to date which includes the revenue expenditure by fund, noting the existence of a General Fund as distinguished from the Grant Fund used to promote the work of the Commission as outlined in the grant agreement.

Chair Schreiber gave the Fundraising Subcommittee Report detailing the application for another round of grant funding to extend the Director of Planning position through 2026 with three purposes: to develop a Year Zero Program; to provide operational support for the Commission; and to promote public relations in regard to the Community Choice Schools Act. A response to the grant application is expected in late November. The Fundraising Committee is also working on a plan to bring in donations from private individuals and to register as an entity with the US Government, in anticipation of applying for public Charter School Program grant funds in the future.

In the Chairperson Report, Chair Schreiber announced the inclusion of the new Members in subcommittees, these appointments will last until the December meeting when the bylaws call for reevaluating the need for subcommittees. The December meeting will be held in Helena beginning in the early afternoon. Chair Schreiber detailed the development of an evaluation process for the Director of Planning. As called for in the contract with the National Charter Schools Institute, Chair Schreiber is receiving coaching to ensure leadership of a healthy and productive Commission.

The Policy Making Committee Report was delivered by Member Rutt, highlighting past meetings in which the Committee has been refining internal policies for discussion with the entire Commission.

Member Franklin reported on the progress of the Special Education Consideration Subcommittee by first noting the purpose of the subcommittee to serve students with special needs and ensure compliance with federal laws. The subcommittee is currently exploring resources for potential Choice Schools to build out their Special Education programs ensuring best practice and compliance with all applicable federal law.

In the Director of Planning Report by Cathy Kincheloe, Members were updated on progress building out the New School Application Policy and supporting procedures. Under direction of the State Procurement department, a Request for Proposal is underway for consulting services to identify a portfolio of recommended assessments Choice Schools may use as a performance indicator. Administratively, plans are underway to find a new lawyer to review policy to ensure full legal compliance. Updates were provided on professional development opportunities from national charter support organizations, the work of the State Interim Funding Commission as it pertains to Choice Schools, and contact with potential school founders.

Break – 00:38:24

Item 5 Presentation with Question and Answer: Epicenter Training with Alyson Murphy and Stephanie McKean, NCSI – 00:48:32

Alyson Murphy and Stephanie McKean with the National Charter Schools Institute, trained the Commission on the essential functions of the Epicenter application and oversight platform.

Item 6 Break - 01:43:39

Item 7 Presentation with Question and Answer: National Association of Public Charter School Authorizers (NACSA) Introduction – 01:57:37

Gina Post, Director of Fundraising and Business Development, Elisa Westapher, Chief Development and Business Officer, and Jay Whalen, Director Authorizing and School Quality with NACSA presented an overview of NACSA services and recommendations for the new school application cycle.

Break – 02:59:53

Item 8 Discussion and Business: – 03:10:40

1) NACSA Membership:

Chair Schreiber made a motion for the Commission to purchase a NACSA membership. Motion seconded by Member Ramos.

Chair Schreiber opened discussion. Member Lindenlaub asked what the membership costs. Director of Planning Kincheloe confirmed the cost is \$500 for one year.

Chair Schreiber opened public comment. None stated.

Motion passed unanimously.

2) Robert's Rules of Order Made Easy Training:

Member Rutt made a motion for the Commission to purchase a license for Robert's Rules of Order Made Easy. Motion seconded by Member Lindenlaub.

Chair Schreiber opened discussion. Member Rutt asked why it is no longer free to the Commission. Chair Schreiber clarified it was only available to appointees made by the Governor. Member Rutt asked what it costs. Director of Planning Kincheloe confirmed the cost is \$497 for up to 10 Members. Chair Schreiber elaborated on future need for the training.

Chair Schreiber opened public comment. None stated.

Motion passed unanimously.

3) Legal Services:

Member Lindenlaub made a motion for the Commission to open discussion to authorize a contract for legal services. Motion seconded by Member Rutt.

Chair Schreiber opened discussion. Chair Schreiber elaborated as to the need for legal services. Chair Schreiber then asked Executive Director Flynn for clarification on the motion. Executive Director Flynn explained the process and offered suggestions for re-wording of the motion.

Chair Scheiber moved to amend the motion to, "Should the Commission allow Cathy & McCall to execute a contract with a lawyer for the Commission?" Motion seconded by Member Lindenlaub.

Amendment to the motion passed unanimously.

Chair Schreiber restated the amended motion.

Chair Schreiber opened discussion and requested public comment. None stated.

Amended motion passed unanimously.

4) Conflict of Interest Policy:

Member Lindenlaub made a motion for the Commission to approve the Conflict of Interest Policy as published in the agenda packet. Motion seconded by Chair Schreiber.

Chair Schreiber opened discussion. Chair Schreiber asked Director of Planning Kincheloe to provide any pertinent detail. Director of Planning Kincheloe provided updates made since the previous version reviewed by the Commission. Chair Schrieber provided further comment as to Members following the highest standards of conduct.

Chair Schreiber opened discussion and requested public comment. None stated.

Motion passed unanimously.

5) Background Check Policy:

Chair Schreiber made a motion for the Commission to accept the Background Check Policy as presented in the agenda packet. Motion seconded by Member Ramos.

Chair Schreiber opened discussion. Member Lindenlaub referenced the paragraph regarding convictions, asking if it would be appropriate to publish with the new application. Chair Schreiber deferred to Director of Planning Kincheloe to provide any pertinent detail. Director of Planning Kincheloe stated it would be included in the new application packet. Chair Schreiber elaborated the Background Check process occurs before applications are due. Director of Planning Kincheloe provided information as to the status of the Commission's application with the Department of Justice to be a provider of background checks as well as the training process prior to conducting checks.

Chair Schreiber requested public comment. None stated.

Motion passed unanimously.

6) Member Handbook:

Chair Schreiber asked Director of Planning Kincheloe to lead the discussion on the components of the Member Handbook. Chair Schreiber asked the new Members for feedback. Member Lindenlaub asked if the Open Meeting Law calling for meetings to be held in the impacted communities requires the Commission to travel for the meetings. Executive Director Flynn clarified, stating that Zoom participation complies with Open Meeting Law 2-3-111(2). The Member Handbook will be posted on the Commission's website once finalized.

Public Comment – 03:42:59

No public comment provided.

Chair Schreiber thanked Members for their participation in the meeting. She also thanked Executive Director Flynn and the staff of the BPE for their continued support. Special thanks were given to Kris Stockton for her participation in the Request for Proposals process. Chair Schreiber offered a final appreciation to Members for their service to the State and commitment to improving public school options in Montana.

Adjourn

Meeting adjourned at - 03:44:33



**MONTANA
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CHOICE SCHOOLS**

Community Choice Schools Commission

Meeting Minutes

October 10 & 11, 2025

Extended Work Session

Call to Order - 10:02 a.m. 10/10/25

Chair Schreiber called the meeting to order at 10:02 a.m. The Chair led the Commission in the Pledge of Allegiance. Director of Planning Kincheloe took Roll Call. The Chair read the Statement of Public Participation and welcomed guests, Dr. Jim Goenner and Mary Bradely of the National Charter Schools Institute, meeting facilitators.

Commission members present: Trish Schreiber, Chair; Jon Rutt, Treasurer; Mark Hufstetler; Katey Franklin (arrived 10:16 a.m.); Chip Lindenlaub; Taylor Ramos; and Director of Planning Cathy Kincheloe.

Facilitators: Dr. Jim Goenner and Dr. Mary Bradely, National Charter Schools Institute.

Guests Present: none.

Approve Current Agenda for 10/10 - 10/11/25

Member Lindenlaub moved to approve the Agenda as presented. Motion seconded by Member Hufstetler.

No discussion. Motion passed unanimously.

Agenda Item 2 – Item 7 WORK SESSION:

Chair Schreiber noted this is a work session and no action would be taken. She then put the Commission at ease and turned the meeting over to Dr. Jim Goenner as lead facilitator.

Dr. Goenner led the Commission through a series of focused conversations on various topics as listed on the agenda. All members engaged in robust dialogue throughout the day focused on:

- Overview of Discussion: Strategic Advance
 - Dr. Goenner highlighted the purpose, goals & expectations for the Advance.
- Engagement Activity: Identifying our Whys
 - Why are you serving on the MCCSC?
 - Each member shared their personal journey to the Commission, ultimately culminating in the commonality that every member felt called to serve and compelled to do well by students, families, and communities across the state.
- Work Session: Review of Draft Materials of Core Values
 - The Commission took time to individually read and consider the Core Values draft.
 - Members participated in a deep discussion leading to refinement of the Core Values reflecting

the intent of the Law and the importance of acting in the best interest of students, families, educators, communities, and tribes. Intentional thought was given to ensuring the values translate to future Members by referencing the State Constitution and CCSA.

- Engagement Activity: Deep Dive
 - After a break, Commission members re-evaluated the work from the previous discussion to refine use of language in the Core Values draft.
 - The Commission will vote on the Core Values in the December meeting, giving everyone another opportunity to consider changes before taking action.
- Overview of Discussion: The Role of the Director, the Team Leader
 - Members engaged in future planning for the director's role by reviewing the current job description thinking towards the future when it may be possible for the Commission to authorize and oversee CCS.
 - Members contemplated whether a single person could do the job while also authorizing, and what additional human resources may be necessary, such as consultants.

Public Comment

No visitors were present for public comment.

The Commission recessed for the day at 4:27 p.m.

Call to Order - 8:37 a.m. 10/11/25

Chair Schreiber called the meeting to order at 8:37 a.m. The Chair led the Commission in the Pledge of Allegiance. Roll call was taken.

Commission members present: Trish Schreiber, Chair; Jon Rutt, Treasurer; Mark Hufstetler; Katey Franklin; Chip Lindenlaub; Taylor Ramos; and Director of Planning Cathy Kincheloe.

Facilitators: Dr. Jim Goenner and Dr. Mary Bradely, National Charter School Institute.

Guests Present: none.

Agenda Item 8 – Item 13 WORK SESSION:

Chair Schreiber put the Commission at ease and turned the meeting over to Jim Goenner as lead facilitator.

Dr. Goenner led the Commission through a series of focused conversations on various topics as listed on the agenda. All members engaged in robust dialogue throughout the day focused on:

- Overview of Discussion: Duties of Members
 - Chair Schreiber led Members in a review of the law, reminding everyone of the importance of their roles as detailed in their Oath of Office, the Constitution, and Title 20, Chapter 11. The Commission specifically reviewed duties detailed in 20-11-106 through 109, regarding appointments, duties as authorizers of schools and other authorizers. The members discussed the additional responsibilities of members as outlined in the Commission's own policies.
 - Standards of conduct during in-person meetings and Zoom meetings were also discussed. The whole commission offered comments on how members should conduct their participation in meetings.
 - The role of Commission Members discussed what it means to be "guardians of opportunity"

and “stewards of possibility.”

- Engagement Activity: Name It
 - Members worked in small teams discussing how to gain trust and build credibility with key stakeholders. NCSI staff facilitated deeper considerations leading Members to consider how the values of stakeholders connect with the opportunity present with Community Choice Schools.
 - Members worked in small teams to craft talking points and elevator pitches with various types of stakeholders to bring a better understanding of CCS.
- Overview of Discussion: Looking Ahead from Vision to Implementation
 - Director of Planning Kincheloe led Members through the draft policies and procedures for launching the first application cycle. NCSI facilitators provided feedback to assist in refining procedures.
- Overview of Discussion
 - Member shared closing thoughts and future work

Public Comment

None.

The Commission adjourned at 12:10 p.m.



Montana Community Choice Schools Commission

Meeting Agenda

December 9, 2025

Zoom Webinar

9:00 a.m. to 11:15 a.m.

	Estimated Time	Details
Call to Order	9:00 a.m.	<ol style="list-style-type: none"> 1. Pledge of Allegiance 2. Roll Call 3. Statement of Public Participation 4. Welcome and Introduction of Visitors
Note to the Public		<ol style="list-style-type: none"> 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> 2. All times are approximate and may change as reasonably necessary.
Agenda		
Item 1	9:05 a.m.	<ul style="list-style-type: none"> ● Action: Consent Agenda Adoption <ul style="list-style-type: none"> ○ Minutes from 9/9/2025 ○ Minutes from Advance 10/10 -10/11/2015 ● Action: Agenda Adoption for 12/9/2025
Item 2	9:10 a.m.	Chairperson Welcome Statement
Item 3	9:15 a.m.	◊ Action: Officer Elections - Chair, Vice Chair, and Treasurer
Item 4	9:25 a.m.	Discussions and Business: <ul style="list-style-type: none"> ◊ Action: 2026 Subcommittees <ol style="list-style-type: none"> 1. Discussion: 2026 Meeting Dates
Item 5	9:35 a.m.	Business: <ul style="list-style-type: none"> ◊ Action: Commission Core Values ◊ Action: Members Affirm Conflict of Interest Statements ◊ Action: Application Proposal Review Policy ◊ Action: Founder Proposed School Application Guidebook ◊ Action: Commission Member Application Guidebook ◊ Action: CCS Annual Report Template ◊ Action: Authorizer Annual Report Requirements and Template ◊ Action: Commission Annual Report Template ◊ Action: Member Expense Approval Policy
Item 6	10:20 a.m.	Break
Item 7	10:30 a.m.	Reports: <ol style="list-style-type: none"> 1. Chairperson Report: Trish Schreiber 2. Fundraising Special Committee: Taylor Ramos 3. Director of Planning Report: Cathy Kincheloe 4. Treasurer Report: Jon Rutt 5. Policymaking Special Committee: Jon Rutt

		6. Special Education Consideration Committee: Katey Franklin 7. Special Report on NACSA Conference: Chip Lindenlaub
Public Comment	11:00 a.m.	This time will be provided for public comment on items not listed on the agenda. This meeting is open to the public electronically. For those wishing to give virtual public comment, please contact cathy.kincheloe@mt.gov to request the Zoom link for the meeting. Written public comment may be submitted to the Director of Planning at cathy.kincheloe@mt.gov and will be shared with the Commission members and included as part of the official public record.
Adjourn	11:15 a.m.	
<i>Note to the Public</i>		**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. **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 Director of Planning as soon as possible prior to the meeting start date. You may email cathy.kincheloe@mt.gov or phone at 406-407-0727.



The vision of the Community Choice Schools Commission is to develop the full educational potential of each student by fostering a diverse and dynamic public education landscape.



Our Promise

As duly appointed Members of the Montana Community Choice Schools Commission, we embrace our responsibility to serve as stewards of educational opportunity and the public trust. We are committed to helping realize the full promise of our Constitution—for every student, in every community.

Our Guiding Principles

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.

Core Values & Commitments

Courage

We make bold decisions in the best interests of students, even under pressure.

Respect

We communicate. We honor the dignity of students, families, educators, communities, and tribes.

Integrity

We follow through. We are fair, honest, and grounded in our principles and purpose.

Service

We act with intention and humility. We exist to serve the people, not ourselves.

Transparency

We share our rationale, invite public understanding, and welcome accountability.

Learning

We grow through reflection, data, feedback, and the wisdom of Montana's people.

Our Core Purpose

1. To authorize, oversee, and hold accountable public community choice schools for fulfilling the terms of their contracts.
2. To approve, oversee, and evaluate the effectiveness of public community choice school authorizers.



Conflict of Interest

The Community Choice Schools Commission acts in accordance with the Montana Code Annotated Title 2 Chapter 2: Standards of Conduct in whole and specifically as it pertains to the work of the Commission as outlined in the sections below.

2-2-101. Statement of Purpose. The purpose of this part is to set forth a code of ethics prohibiting conflict between public duty and private interest as required by the constitution of Montana. This code recognizes distinctions between judges, legislators, judicial officers, other officers and employees of state government, and officers and employees of local government and prescribes some standards of conduct common to all categories and some standards of conduct adapted to each category. The provisions of this part recognize that some actions are conflicts per se between public duty and private interest while other actions may or may not pose such conflicts depending upon the surrounding circumstances.

2-2-102. Definitions. As used in this part, the following definitions apply to the Community Choice Schools Commission:

(8) "Public employee" means:

(c) a member of a quasi-judicial board or commission or of a board, commission, or committee with rulemaking authority;

2-15-102(10) "Quasi-judicial function" means an adjudicatory function exercised by an agency, involving the exercise of judgment and discretion in making determinations in controversies. The term includes but is not limited to the functions of:

(a) interpreting, applying, and enforcing existing rules and laws;

2-2-103. Public trust -- Public Duty.

(1) The holding of public office or employment is a public trust, created by the confidence that the electorate reposes in the integrity of public officers, legislators, and public employees. A public officer, legislator, or public employee shall carry out the individual's duties for the benefit of the people of the state.

(2) A public officer, legislator, or public employee whose conduct departs from the person's public duty is liable to the people of the state and is subject to the penalties provided in this part for abuse of the public's trust.

(3) This part sets forth various rules of conduct, the transgression of any of which is a violation of public duty, and various ethical principles, the transgression of any of which must be avoided.

2-2-104. Rules of conduct for public officers, legislators, and public employees.

(1) Proof of commission of any act enumerated in this section is proof that the actor has breached the actor's public duty. A public officer, legislator, or public employee may not:

(a) disclose or use confidential information acquired in the course of official duties in order to further substantially the individual's personal economic interests; or

(b) accept a gift of substantial value or a substantial economic benefit tantamount to a gift:

(i) that would tend improperly to influence a reasonable person in the person's position to depart from the faithful and impartial discharge of the person's public duties; or

(ii) that the person knows or that a reasonable person in that position should know under the circumstances is primarily for the purpose of rewarding the person for official action taken.



Conflict of Interest

2-2-105. Ethical Requirements for Public Officers and Public Employees.

(1) The requirements in this section are intended as rules of conduct, and violations constitute a breach of the public trust and public duty of office or employment in state or local government.

(2) Except as provided in subsection (4), a public officer or public employee may not acquire an interest in any business or undertaking that the officer or employee has reason to believe may be directly and substantially affected to its economic benefit by official action to be taken by the officer's or employee's agency.

(3) A public officer or public employee may not, within 12 months following the voluntary termination of office or employment, obtain employment in which the officer or employee will take direct advantage, unavailable to others, of matters with which the officer or employee was directly involved during a term of office or during employment. These matters are rules, other than rules of general application, that the officer or employee actively helped to formulate and applications, claims, or contested cases in the consideration of which the officer or employee was an active participant.

(4) When a public employee who is a member of a quasi-judicial board or commission or of a board, commission, or committee with rulemaking authority is required to take official action on a matter as to which the public employee has a conflict created by a personal or private interest that would directly give rise to an appearance of impropriety as to the public employee's influence, benefit, or detriment in regard to the matter, the public employee shall disclose the interest creating the conflict prior to participating in the official action.

(5) A public officer or public employee may not perform an official act directly and substantially affecting a business or other undertaking to its economic detriment when the officer or employee has a substantial personal interest in a competing firm or undertaking.

Ethical Requirements Adopted by the Community Choice Schools Commission

(1) A Member may not hold a paid position with a Choice School or any entity in which the Choice School holds a contract for services.

(2) A Member voluntarily leaving the Commission may not obtain employment that would not be available to others with a Choice School or Authorizer in which the member was involved in approving a contract within 12 months of leaving the Commission. This also applies to any entities in which the member has approved a contract for services directly with the Commission.

(3) A Member who is an employee or governing board member of a Choice School or Authorizer, has a relative who serves as an employee or governing board member at a Choice School or Authorizer, including a child enrolled in or seeking enrollment in a Choice School, has a direct financial interest in a company that may profit from a Choice School or Authorizer, the Member shall disclose the interest prior to participating in a vote to approve or deny a charter or authorizer contract. This also applies to any entities seeking to contract directly with the Commission.

(4) A Member who is an employee or governing board member of a Choice School or Authorizer, has a relative who serves as an employee or governing board member at a Choice School or Authorizer, including a child enrolled in or seeking enrollment in a Choice School, has a direct financial interest in a company that may profit from a Choice School or Authorizer, the Member shall recuse themselves from voting on any contract approvals and renewals including Choice Schools, Authorizers, or contracts for service directly with the Commission.



Conflict of Interest

Procedures Adopted by the Community Choice Schools Commission

(1) Duty to Disclose

(a) In connection with any actual or possible conflict of interest, an interested Member must disclose the existence of the interest in a public Commission meeting and be given the opportunity to disclose all material facts to the Commission considering the proposed transaction or arrangement.

(b) At this time the Member may voluntarily recuse him or herself from any discussion and/or subsequent Commission vote regarding the subject of the potential conflict of interest.

(c) If there is need of further determination whether a conflict exists, after disclosure of the interest and all material facts, and after any discussion with the interested Member, he/she shall leave the Commission meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Commission Members shall decide if a conflict of interest exists.

(2) Violations of the Conflicts of Interest Policy

(a) If the Commission has reasonable cause to believe a Member has failed to disclose actual or possible conflicts of interest, it shall inform the Member of the basis for such belief and afford the Member an opportunity to explain the alleged failure to disclose.

(3) Enforcement

(a) If, after hearing the Member's response and after making further investigation as warranted by the circumstances, the Commission determines by majority vote the Member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action as pursuant to **2-2-136. Enforcement for judicial officers, state officers, legislators, and state employees -- referral of complaint involving county attorney.**

Annual Statement

Each Commission Member shall receive a copy of this policy on an annual basis and affirm in a public meeting of the Commission for public record that such Member:

- 1) Has received a copy of the conflicts of interest policy,
- 2) Has read and understands the policy, and
- 3) Has agreed to comply with the policy.

Please read before reviewing the Application Review Policy documents.

The following two documents pertain to the proposed school application policy. The first document is the original policy drafted in June 2024. The second document is the proposed final version of the policy that takes into consideration most recent best practice as advised by the National Charter Schools Institute (NCSI) and the National Association of Charter School Authorizers (NACSA).

Please review each policy noting the following revisions in the proposed final policy:

- Timing of the application cycle moved out of the summer months
- Three phases of the constituting a complete application
 - Phase I Written Application
 - Phase II Public Forum
 - Phase III Applicant Interview
 - *20-11-111 (12)The proposal review process must include thorough evaluation of each **written choice school proposal**, an **in-person interview** with the applicant group, and an **opportunity in a public forum for local residents** to learn about and provide input on each proposal.*
- Addition of:
 - General Information Sessions outlining the application process for potential applicants
 - Notice of Intent to Submit an Application
 - Application Review Subcommittee to review each application & fully participate in application cycle (not whole Commission)
 - Pitch Meetings
 - Epicenter platform application submission
 - Removal of the Sufficiency Review (Epicenter will not accept an incomplete application)
 - Addition of Executive Summaries of each application available to all members and the public
 - Public Forum in the local community allowing residents input on the school
 - Applicant Interview with the Application Subcommittee and Director only
 - Removed inclusion of the public to respect the applicants' ability to focus distraction free and to promote public comment by advancing to its own phase
 - Written public comment will be accepted throughout the process once the applications are received and posted on the Commission's website. On-site, in person meetings specifically for public comment will take place within the community of the proposed Choice School
 - Public comment is also welcome at the deliberation meeting
 - Final summary of the application and interview provided to the Commission from the Director and placed in the Agenda Packet for the meeting when charter approvals and denials will be deliberated



Montana Community Choice Schools Commission

Application Review and Approval Process Policy for Initial Community Choice Schools Applications

INITIAL DRAFT June, 2024

(Irrelevant to the renewal process of existing charter contracts.)

February

1. The Montana Community Choice School Application will be issued and posted by February 15th of each year on the Board of Public Education's website under the Community Choice Schools tab. The application will be broadly publicized statewide.

May

2. Applications can be submitted to the Montana Community Choice School Commission (Commission) on (XX/XX/XX--date) during the first week of May at 5:00 p.m. The precise due date will be announced yearly by February 15th. All Applications will be submitted electronically.
3. The Commission will notify each applicant by email upon receipt of the Application.
4. Each Community Choice School Application will be published on the Board of Public Education's website under the Community Choice Schools tab, allowing the public to read through each Application before the Commission takes action.
5. Each Application must pass a **sufficiency** review conducted by the Commission's Application Subcommittee. Any **insufficient** Applications will be identified within **3 business days** of receipt, and the applicants **will** have the opportunity to remedy the **insufficient** status within **3 business days of notification of an insufficient Application**.
6. The Commission will thoroughly evaluate each complete Application and schedule an interview, in-person or by webinar, with each applicant team including but not limited to: Governing Board, Charter Management Organization, Education Service Provider, proposed school leader or legal counsel. These interviews will also be open to the public and provide local residents, along with all members of the public, the opportunity to provide input on each complete Application before Applications are considered for approval or denial by the Commission.
7. The Commission will evaluate each complete Application and interview based on the Community Choice Schools Application Evaluation Criteria, a policy that will guide the Commission's decision to approve or deny a choice school Application.



Montana Community Choice Schools Commission

July

8. Within 45 business days of the Application deadline, the Commission will send a condensed packet of a review of each Application to the Montana Board of Public Education's Charter Committee for presentation at the Board's regularly scheduled July meeting. The Board Charter Committee will have 15 **calendar** days to review the information, share it with the full Board, and provide the Commission with input e.g., questions or concerns to inform the Commission's final communications with the applicants before the Commission convenes for action. These 45 business days may be extended and adjusted with the Board of Public Education if the Commission receives more than three Applications.
9. The Commission will convene within 60 business days of the Application deadline. This timeframe **may** extend to 120 business days if more than **3** Applications have been received. Each Application will be deliberated individually in an open meeting. The Board's Charter Committee members, the Chair of the Board, or the Board's Executive Director may join the Commission in formal deliberations about each Application.

September

10. Approved Applications will advance to the contracting stage. Contracts will be signed within 45 business days of approval, provided the applicant agrees to the terms of the Commission's proposed contract.
11. Denied Applications will be provided with a written explanation as to why their application was denied, and applicants may re-apply in the next Application Cycle or any future Application Cycles.



Application Proposal Review Policy for Community Choice School Applications

May (prior to Application Deadline)

1. Application Launch Date Announced: The Community Choice Schools Application Deadline will be issued and posted by June 1st of each year on the [Board of Public Education's \(Board\) website](#) under the Community Choice Schools tab. The application will be broadly publicized statewide. All information related to the Application Process including the Founder Proposed School Application Guidebook can be found on [bpe.mt.gov](#) under the Community Choice Schools tab. The full Application Proposal comprises three phases; Phase I Written Application, Phase II Public Forum, and Phase III Applicant Interview.

June-December (prior to Application Deadline)

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 Community Choice Schools Commission (Commission) a Notice of Intent to apply for a new Community Choice School.
4. Written Application Platform Access: Applicants may begin submitting requests to access the written application platform in which they will be able to begin drafting their Application before final submission.
5. Pitch Meetings: Applicants are highly encouraged to sign up for a 30-minute Zoom meeting with the Commission's Application Review Subcommittee to present pitches for student recruitment and philanthropy. Applicants will also have an opportunity to ask clarifying technical questions.

January

6. Phase I Written Applications Due: Applications can be submitted to the Commission on (XX/XX/XX) until 5:00 p.m., Mountain Time. All Applications must be submitted electronically via the Application Platform.
7. 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.
8. Public Posting: Each complete Application and Executive Summary 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 in April. Written public comment will be closed one week prior to Deliberation in order for the Director to compile and distribute comments to Members.
9. Interview Scheduling: The Commission's Application Review Subcommittee will schedule interviews, in-person or by webinar, with each applicant team, including but not limited to: Governing Board, Charter Management Organization, Education Service Provider, proposed school leader, and legal counsel.

This Application Cycle is for Community Choice Schools opening not before (XX/XX/XX—date).

February

10. Written Application Review: The Commission's Application Review Subcommittee will evaluate each Application based on the Community Choice Schools Application Evaluation Criteria, a policy that guides the Commission's decision to approve or deny a Choice School Application.
11. Phase II Public Forum Begins: The Applicant team makes a presentation of their proposed school to the resident community, Director, and Members of the Application Review Subcommittee. The presentation is followed by an opportunity for the public to offer their comments. Public Forums will be held in the community of the proposed school. The purpose of the Forum is to understand community needs, gauge outreach efforts, and the ability to build authentic relationships with families and stakeholders.

March

12. Phase II Public Forums Continue
13. Provide Executive Summaries to the Board of Public Education: Board of Public Education Application Review: Within **45 business days** of (XX/XX/XX—Application Deadline Phase I Written Application), the Commission will send a condensed packet containing an Executive Summary of each application to the Montana Board of Public Education's Charter Committee for presentation at the Board's regularly scheduled March meeting. The Board Charter Committee will have **15 calendar days** from receipt of the Executive Summary to review the information, share it with the full Board, and provide the Commission with written input e.g., questions or concerns to inform the Commission's final communications with the applicants before the Commission convenes for action. These 45 business days may be extended and adjusted with the Board of Public Education if the Commission receives more than three applications.
14. Phase III Applicant Interviews Begin: The Commission's Application Review Subcommittee 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, probe areas of uncertainty or concern, and to go deeper into the Applicant Team's capacity to possess the academic, organizational, and financial capacity to open and sustain a successful school. This constitutes a complete Application Proposal Review Process.

April

15. Phase III Applicant Interviews Continue
16. Director's Summary to Members: The Commission's Director will provide a Director's Summary of each Application and Interview to Commission Members as well as all written public comment.
17. Application Deliberation: The Commission will convene as soon as possible and no later than **60 business days** of (XX/XX/XX—date of the Application Deadline Phase III Applicant Interview). This timeframe may extend to 120 business days if more than 3 Applications have been received. Each Application will be deliberated individually in an open meeting. The Board's Charter Subcommittee members, the Chair of the Board, or the Board's Executive Director may join the Commission in formal deliberations about each Application, but only Commission Members may vote.
18. Application Approval: Applicants will be notified via phone and in writing of the approval. Approved Applications will advance to the Contracting stage.
19. 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.

May

20. Contracting: Contracts will be signed within 45 business days of approval, provided the Applicant agrees to the terms of the Commission's proposed contract.

This Application Cycle is for Community Choice Schools opening not before (XX/XX/XX—date).



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Founder Proposed School Application Guidebook

Insert Application Year

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2. Proposed School Application Policy
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5. Informational Sessions Procedures
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7. Submission Platform Access Directions
8. Pitch Meeting Procedures
9. Proposed School Application
10. Public Forum Procedures
11. Interview Procedures
12. Sample Contract
13. Performance Framework
14. Start-up Year Program Framework



Pre-Application Process

May - December

RFP Posted	Information Sessions	Notice of Intent	Epicenter Access	Pitch Meetings
Application window & directions to submit Application posted	Director hosts open webinars for potential Applicants to gain insight to CCS & the Application process	Applicants submit the NOI template to Director & Commission detailing a general overview of their school model	Applicants gain access to Epicenter to begin drafting their Application	Applicants pitch their model to Director & Application Review Subcommittee with Q&A

Application Process

January - April

Written Applications Submission & Review	Public Forums	Applicant Interviews	Deliberation
Written Applications are submitted in Epicenter and posted for the public to view Written Applications are evaluated according to the Application Criteria by the Application Review Subcommittee & Director	Applicants host the public, Application Review Subcommittee, & Director for an overview of their proposed school model. Local residents provide public comment.	Applicants answer clarifying questions & challenge scenarios from Application Review Subcommittee and Director.	Application Subcommittee and Director provide a final recommendation report on each Application to Members Applications are deliberated in an open meeting with input from the BPE & public culminating in a final vote by Members

Contracting to Opening

May through Fall of Next Year

Contracting	Building Oversight Model	Year Zero
Contracts offered to approved applicants	Performance Framework & oversight metrics built into Epicenter	School founder cohorts meet for training & consulting to fully build out their academic, cultural, operational, & financial models



Community Choice Schools Application Directions to Founders

The Community Choice Schools Commission is held to the following Legislative Findings And Intent in considering the approval or denial of applications to establish Community Choice Schools.

20-11-102. Community choice schools -- legislative findings and intent. (1) The legislature finds, pursuant to the authority and duties provided in Article X, section 1(3), of the Montana constitution, that:

(a) parents desire education options for their children;
(b) expanding educational opportunities for K-12 education within the state is a valid public purpose;
and

(c) creating options that empower parents, encourage students to develop their full educational potential, provide a variety of professional opportunities for teachers, and encourage educational entrepreneurship is vital to the economic competitiveness of the state.

(2) It is the legislature's intent, pursuant to the authority and duties provided in Article X, section 1(3), of the Montana constitution, to create other public educational programs and institutions through choice schools. The purposes are to:

(a) enable parents to make decisions on how best to educate their children;
(b) provide other public educational opportunities for all students, especially those at risk of academic failure or academic disengagement;
(c) encourage the use of different models of teaching, governing, scheduling, and providing instruction to meet a wide variety of student and community needs; and
(d) advance Montana's commitment to the preservation of American Indian cultural identity, pursuant to Article X, section 1(2), of the Montana constitution, and to eliminate the American Indian achievement gap by encouraging participation in the choice school program by students, parents, and school districts in Indian country.

The Community Choice Schools Commission follows a comprehensive approach to the evaluation and approval of new school applications. The process and timeline for soliciting and considering new Community Choice school applications is outlined below.

Timeline (actual dates to be entered for each cycle)	Application Steps	Directions to Applicant
	1. Application Deadline Announced	The Community Choice Schools Application Deadline will be issued and posted by June 1 st of each year on the Board of Public Education's (Board) website under the Community Choice Schools tab.
	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.



Community Choice Schools Application Directions to Founders

	3. Notice of Intent	Applicants send the Community Choice Schools Commission a Notice of Intent to apply for a new Community Choice School.
	4. Request Access to the Application Platform	Applicants may begin submitting requests to the Commission Director (insert email) to access the application platform in which they will be able to begin drafting their Application before final submission.
	5. Register for a Pitch Meeting	Applicants are highly encouraged to sign up for a 30-minute Zoom meeting with the Commission's Application Review Subcommittee to present a pitch of their school model and ask clarifying technical questions. (Link to sign-up)
	6. Pitch Meetings	Applicants pitch their model and ask clarifying technical questions to the Commission's Application Review Subcommittee in a 30 minute Zoom meeting.
	7. Phase I: Written Applications Deadline	Applications can be submitted to the Commission until 5:00 p.m., Mountain Time. All Applications must be submitted electronically via the Application Platform. Each Applicant will be notified by email within 24 hours of receipt of the Application.
	8. Interview & Public Forum Scheduling	Applicants will be contacted by the Commission's Application Review Subcommittee to schedule a public forum and interview with each applicant team.
	9. Written Application Review	Written Applications will be reviewed by the Commission's Application Review Subcommittee based on the Community Choice Schools Application Evaluation Criteria, a policy that guides the Commission's decision to approve or deny a Choice School application.
	10. Phase II: Public Forum	The Applicant team makes a presentation of their proposed school to the resident community, Director, and Members of the Application Review Subcommittee. The presentation is followed by an opportunity for the public to offer their comments. Public Forums will be held in the community of the proposed school. The purpose of the Forum is to understand community needs, gauge outreach efforts, and the ability to build authentic relationships with families and stakeholders.
	11. Phase III: Applicant Interviews with the Commission	Applicant Teams will participate in an interview with the Commission's Application Review Subcommittee. The interview allows the Commission to seek clarification on content submitted in the Application, and it is also an opportunity to go deeper into the Applicant Team's capacity, connection with community, and ability to problem solve via challenge scenarios.
	12. Application Summaries	The Commission Director will make a summary presentation of each application to the BPE.



Community Choice Schools Application Directions to Founders

	Presented to the Board of Public Education	
	13. Application Deliberation	Each application will be deliberated individually in an open meeting by the Commission Members. Members of the BPE Charter Subcommittee members, the BPE Chair, and the BPE's Executive Director may join the Commission in formal deliberations about each Application, but only Commission Members will vote. Applicants are encouraged to attend. Meeting dates and agendas can be found on the BPE's website under the Community Choice Schools tab.
	14. Notice of Application Approval or Denial	Applicants will be notified via phone and in writing of the approval. Approved Applications will advance to the Contracting stage. Denied Applications will be provided with a written explanation as to why the Application was denied. Applicants may re-apply in any future Application Cycle.
	15. Contracts Issued	Applicants will be sent contracts for signing within 45 business days of approval, provided the applicant agrees to the terms of the Commission's proposed contract.
	16. Optional Year Zero Start-up Support Program	Community Choice School founders, school leaders, team members, and governing board cohorts are invited to meet monthly for training; 1-1 consulting with Commission Director including expert guests, asynchronous trainings & practical information sessions, community of practice groups to ensure all components of the academic, operational, cultural, and financial models of the application and contract are ready to launch opening day.



Community Choice Schools Criminal Background Check Policy

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Updates will be made to the policy once the Commission's application is approved and training is provided.



Information Sessions Procedures

Dates:

Request Zoom Link: email cathy.kincheloe@mt.gov

Format: The Commission Director will present an introduction to Community Choice Schools and details of the Proposed School Application process including distributing the Founder Potential School Application Guidebook with time for questions from potential school founders.

Duration: 45 - 60 minutes



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Notice of Intent to Submit a Proposed School Application

An applicant must submit a Notice of Intent to apply for a Community Choice School. The NOI must be submitted via email to [ENTER EMAIL]. Applicants must use the NOI template below.

Proposed School Information	
Name of proposed school	
Primary contact person	
Email	
Phone	
Mailing address	
Proposed location of the school (city/town and school district)	

Proposed Grades and Enrollment		
Charter Year	Grade Level(s)	Enrollment
Year 1		
Year 2		
Year 3		
Year 4		
Year 5		
At Capacity		

Additional School Information		
We plan to apply as a:		
<input type="checkbox"/> New School	<input type="checkbox"/> Replication of Existing School	<input type="checkbox"/> Conversion School (from existing to Choice)
Do any of the following describe your organization, or the school/campuses you will propose?		
Seeks approval for multiple campuses under a single charter. If yes, please indicate how many. <input type="checkbox"/> Yes <input type="checkbox"/> No		
Already operates schools elsewhere in the U.S. If yes, please indicate where. <input type="checkbox"/> Yes <input type="checkbox"/> No		

Will contract or partner with an education service provider (ESP). If yes, please indicate the name of the ESP. <input type="checkbox"/> Yes <input type="checkbox"/> No	
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Founding Team Including Board Members and Proposed School Leader(s)		
Full Name	Current Role and Organization	Role with Proposed School

Proposed School Description	
State the proposed school's mission statement.	
Provide a brief overview of the proposed school's education model.	

Community Engagement	
Provide a bulleted list of the community engagement the founding team has done to date.	

Signature of Applicant's Authorized Representative

Name

Role with Applicant Organization

Signature

Date



Proposed School Founder Application Platform Directions

Upon receipt of the Notice of Intent to Apply, Applicants will receive an email with a login and directions for submitting the final application in the Epicenter platform.

FAQs: <https://support.epicenternow.org/home/application/applicants-faqs/>

Applicants can find resources for navigating the Epicenter platform within the platform.



Proposed School Application Pitch Meeting Procedures

Policy Related to Conducting Applicant Pitch Meetings

Applicants are encouraged to request a 30-minute Zoom meeting with the Commission's Application Review Subcommittee to practice elevator pitches. Each team should be prepared to deliver two pitches: 1) to families when recruiting students; and 2) to potential funders. The founders should demonstrate a compelling model, showcase the founding team's capacities, and demonstrate their readiness to execute the proposed model.

Logistics

- Notice to Applicants: Included in Application Directions posted on BPE website
- Dates: First Wednesday in December/TBD
- Duration: 30 minutes
- Scheduling: Director to post link to sign-up on BPE page
- Attendees: Commission Application Review Subcommittee Members, Commission Director, Applicants
- Location: Zoom

Pitch Meeting Schedule

- Introductions (3 mins)
- The Recruitment Pitch (5-10 mins)
 - Commission Members offer feedback and ask clarifying questions
- The Funders Pitch (5-10 mins)
 - Commission Members offer feedback and ask clarifying questions
- Applicant Questions to Commission (5-10 mins)
 - Applicants may ask clarifying questions about the application and contracting processes

Components to Consider when Creating the Pitches

- Introduction, Vision, and Mission
 - Highlight relevant expertise of the founding team
 - Briefly outline the school model and development progress
 - Clearly articulate the proposed school's mission and vision
- School Model Overview
 - Provide an overview of key design elements
 - Explain how the model aligns with community priorities
- Community Engagement and Research
 - Share how the founding team has engaged with the community so far
 - Highlight insights from the community that have shaped the school's model
- Plan of Execution
 - Outline a high-level plan for launching the school, including aspirations for board development, hiring, continued community engagement, and facilities acquisition
 - Address any partnerships or resources that will support implementation

Resources

- [NACSA Guide to Pitch Meetings](#)
- [NCSI Bold by Choice Episode Three: The Charter Application](#)

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TO REDUCE PAGES IN THE AGENDA PACKET



Proposed School Application



Public Forum Procedures for Founders

Policy Related to Public Forum

The Commission's Application Review Subcommittee and Director will attend a Public Forum hosted by the Applicant Team in their local community. The Applicant Team will make a presentation of their proposed school to the resident community and Commission followed by an opportunity for public comment.

Logistics

- Dates: TBD/February and March
- Notice to Community: The Applicant Team will be responsible for making notice to the community
- Duration: 60 minutes
- Scheduling: Commission Director will coordinate scheduling with the main contact on the Written Application
- Posting: Meeting agenda, time, location posted on BPE website
- Attendees: Commission Application Subcommittee Members, Commission Director, Applicants, interested members of the local community
- Location: In person in the local community where the school will operate (preferably in the proposed school building if possible)

Public Forum Schedule

- Introductions & Overview (10 mins)
- Presentation of the Proposed School Model (20 mins)
- Public Comment (30 mins)



Application Interview Procedures for Founders

Policy Related to Conducting Applicant Interviews

The Commission's Application Review Subcommittee and Director will conduct an interview with each Applicant Team. The interview allows the Commission to seek clarification on content submitted in the Application, and the interview is also an opportunity to go deeper into the Applicant Team's capacity, connection with community, and ability to problem solve via challenge scenarios.

Logistics

- Notice to Applicants: Included in Application Directions posted on BPE website
- Dates: TBD/March or April
- Duration: 90 minutes
- Scheduling: Director to schedule with applicant within 3 days of application receipt
- Attendees: Commission Application Subcommittee Members, Commission Director, Applicants
- Location: Helena or TBD

Interview Schedule

- Commission Introductions & Overview (10 mins)
- Founding Team Introductions (10 mins)
 - Invite the founding team to BRIEFLY introduce themselves and share their current and potential future role with the proposed school and their personal "why" for founding this school
- Interview Questions and Challenge Scenario (60 mins)
 - Ask probing questions based on the review team's assessment of the written application and other touchpoints to date. Focus questions on the people, model, and execution; assess for preparedness to move to the next stage of start-up.
- Closing (10 mins)
 - Provide an overview of the next steps in the application process. Invite questions related to the process from the founding team.

Commission Debrief Immediately Following the Interview

- Application Subcommittee Members and Director discuss responses including interpretation of the team's ability to elaborate on their model, their capacity to offer multiple layers of solutions to challenges, and their efforts to connect to the community.

Resources

- [NACSA Guide to New School Applications](#)
- [NACSA Capacity Interview Guidelines](#)
- [NCSI Bold by Choice Episode Three: The Charter Application](#)

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REDUCE PAGES IN THE AGENDA PACKET



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Charter Contract

(Contract Dates)

**THIS PAGE INTENDED AS A PLACEHOLDER FOR THE PERFORMANCE
FRAMEWORK TO REDUCE PAGES IN THE AGENDA PACKET**



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Performance Framework



Start-up Year Program Framework

Year 0 Program Engagement: School founder cohorts meet monthly for training; 1-1 consulting with Commission Director; Ask an Expert guest speakers; asynchronous trainings & lectures made available; community of practice groups developed

Focus Area	Components to Be Developed
Oversight/ Accountability	<ul style="list-style-type: none"> • Charter Board Training • Chartering 101 • Annual Report • Monthly/Quarterly Benchmarking • Epicenter© Training
Mission, Vision, Values & Goals	<ul style="list-style-type: none"> • Refining & developing the Mission, Vision, Values • Training on making and reaching Mission Specific Goals • How to assess/measure Mission Specific Goals
Strategic Planning	<ul style="list-style-type: none"> • Working back from the mission • Identify core areas of model with definitions/vision • What does success look like? <ul style="list-style-type: none"> ○ How to measure? • Action plan for accomplishment <ul style="list-style-type: none"> ○ Breakdown by quarter ○ Leadership set vision ○ Teachers: PD, resources, supports • Leadership Team Quarterly Tracking <ul style="list-style-type: none"> ○ Action Items/Timeline/Owner
Finance	<ul style="list-style-type: none"> • MT Funding Formula • Budget Development • Facility Financing <ul style="list-style-type: none"> ○ Connect with: Equitable Facilities Fund, Building Hope, Charter School Development Corp., etc. • Grants • Strategic Fundraising • Communications with Office of Public Instruction • Communications with County Treasurers
Operations	<ul style="list-style-type: none"> • Student Recruitment • Lottery Procedures • Staffing Plan <ul style="list-style-type: none"> ○ Professional Growth ○ Measuring Performance • Curriculum & Supplies Procurement <ul style="list-style-type: none"> ○ Access to state eMACS • Scheduling & Calendar
Academics	<ul style="list-style-type: none"> • Measuring Progress/Data Analysis



Start-up Year Program Framework

	<ul style="list-style-type: none">● Professional Development Plan● Meeting Individual Needs-IDEA, 504/ADA, Title programs● Indian Education for All
Culture & Climate	<ul style="list-style-type: none">● Learning Environment<ul style="list-style-type: none">○ Expectations○ Procedures○ Routines● Safety● Student & Staff Wellbeing
Asset Mapping	<ul style="list-style-type: none">● Leveraging Community Resources● Membership with Charter Support Organization● County relationships● Legislative relationships● Parent & Community support organizations



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Commission Member Application Review Guidebook

Insert Application Year

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(note page #s will be inserted in final version)

1. Application General Overview
2. Proposed School Application Policy
3. Application Review Subcommittee Responsibilities
4. Pitch Meeting Procedures
5. Pitch Meeting Notes Template
6. How to Access and Evaluate Applications in Epicenter
7. Application Executive Summary Template
8. Application Evaluation Criteria
9. Public Forum Procedures
10. Public Forum Notes Template
11. Interview Procedures
12. Interview Template
13. Application Final Recommendations Template



Pre-Application Process

May - December

RFP Posted	Information Sessions	Notice of Intent	Epicenter Access	Pitch Meetings
Application window & directions to submit Application posted	Director hosts open webinars for potential Applicants to gain insight to CCS & the Application process	Applicants submit the NOI template to Director & Commission detailing a general overview of their school model	Applicants gain access to Epicenter to begin drafting their Application	Brief Zoom Meeting for Applicants to pitch their model to Director & Application Review Subcommittee with application process Q&A

Application Process

January - April

Written Applications Review	Public Forums	Applicant Interviews	Deliberation
Written Applications are evaluated according to the Application Criteria by the Application Review Subcommittee & Director Director provides Executive Summaries to Members & the BPE Applications are publicly posted	Applicants host the public, Application Review Subcommittee, & Director for an overview of their proposed school model. Local residents provide public comment.	Applicants answer clarifying questions & challenge scenarios from Application Review Subcommittee and Director.	Application Subcommittee and Director provide a final recommendation report on each Application to Members Applications are deliberated in an open meeting with input from the BPE & public culminating in a final vote by Members

Contracting to Opening

May through Fall of Next Year

Contracting	Building Oversight Model	Year Zero
Contracts offered to approved applicants	Performance Framework & oversight metrics built into Epicenter	School founder cohorts meet for training & consulting to fully build out their academic, cultural, operational, & financial models



Application Proposal Review Policy for Community Choice School Applications

May (prior to Application Deadline)

1. Application Launch Date Announced: The Community Choice Schools Application Deadline will be issued and posted by June 1st of each year on the [Board of Public Education's \(Board\) website](#) under the Community Choice Schools tab. The application will be broadly publicized statewide. All information related to the Application Process including the Founder Proposed School Application Guidebook can be found on [bpe.mt.gov](#) under the Community Choice Schools tab. The full Application Proposal comprises three phases; Phase I Written Application, Phase II Public Forum, and Phase III Applicant Interview.

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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.
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7. 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.
8. Public Posting: Each complete Application and Executive Summary 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 in April. Written public comment will be closed one week prior to Deliberation in order for the Director to compile and distribute comments to Members.
9. Interview Scheduling: The Commission's Application Review Subcommittee will schedule interviews, in-person or by webinar, with each applicant team, including but not limited to: Governing Board, Charter Management Organization, Education Service Provider, proposed school leader, and legal counsel.

This Application Cycle is for Community Choice Schools opening not before (XX/XX/XX—date).

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10. Written Application Review: The Commission's Application Review Subcommittee will evaluate each Application based on the Community Choice Schools Application Evaluation Criteria, a policy that guides the Commission's decision to approve or deny a Choice School Application.
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16. Director's Summary to Members: The Commission's Director will provide a Director's Summary of each Application and Interview to Commission Members as well as all written public comment.
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This Application Cycle is for Community Choice Schools opening not before (XX/XX/XX—date).



Proposed School Application Review Subcommittee Responsibilities

Purpose: The purpose of the Application Review Subcommittee is to participate in application reviews and make a recommendation to the Commission to approve or deny any proposed Choice School applications.

Role in the Proposed School Application Process

- November: Review Notice of Intent to Apply
 - Become familiar with the proposed location and model
- December: Participate in Pitch Meetings (or view recordings)
 - Opportunity to meet the founding team, provide feedback on their student recruitment and philanthropy pitches, and answer questions asked by the team about the application process
- February: Review full application
 - Evaluate each application according to the Application Review Criteria, noting questions for the interview
- February/March: Participate in Public Forums in the Local Communities
 - Public Forums provide the Commission with an additional indicator of community interest and applicant preparedness while providing opportunity for public comment.
- February/March: Participate in Interviews
 - Determine the applicant team's capacity to implement the model as proposed, their connection with community need and their ability to problem solve to multiple possible solutions
- March/April: Make a Final Recommendation to Commission
 - The Subcommittee and Director present final recommendations to the Commission at an open meeting.



Pitch Meeting Procedures for Application Review Subcommittee

Policy Related to Conducting Applicant Pitch Meetings

Applicants are encouraged to request a 30-minute Zoom meeting with the Commission's Application Review Subcommittee to practice elevator pitches. Each team will deliver two pitches: 1) to families when recruiting students; and 2) to potential funders. Commission Application Review Subcommittee Members listen to the pitches collecting feedback related to the following: founders demonstrating a compelling model, showcasing the founding team's capacities, and demonstrating their readiness to execute the proposed model.

Logistics

- Dates: First Wednesday in December/TBD
- Duration: 30 minutes
- Scheduling: Director to post link to sign-up on BPE page
- Attendees: Commission Application Review Subcommittee Members, Commission Director, Applicants
- Location: Zoom

Pitch Meeting Schedule

- Introductions (3 mins)
- The Recruitment Pitch (5-10 mins)
 - Commission Members offer feedback and ask clarifying questions
- The Funders Pitch (5-10 mins)
 - Commission Members offer feedback and ask clarifying questions
- Applicant Questions to Commission (5-10 mins)
 - Applicants may ask clarifying questions about the application and contracting processes

Components to Consider when Evaluating the Pitches

- Introduction, Vision, and Mission
 - Relevant expertise of the founding team
 - Brief outline of the school model and development progress
 - Clearly articulated mission and vision
- School Model Overview
 - Overview of key design elements
 - How the model aligns with community priorities
- Community Engagement and Research
 - How the founding team has engaged with the community so far
 - Insights from the community that have shaped the school's model
- Plan of Execution
 - High-level plans for launching the school, including aspirations for board development, hiring, continued community engagement, and facilities acquisition
 - Any partnerships or resources that will support implementation

Resources

- [NACSA Guide to Pitch Meetings](#)
- [NCSI Bold by Choice Episode Three: The Charter Application](#)



Pitch Meeting Notes Template

Pitch Meeting Notes		
Founder(s) & Team Members Present		
School Name		
Location		
Pitch Components	Student Recruitment Pitch	Funder Pitch
Vision & Mission		
Model		
Community Engagement		
Plan of Execution		
Additional Notes		



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How to Access and Evaluate Applications in Epicenter

The Director will schedule a training session for Members led by Epicenter staff.

FAQs: <https://support.epicenternow.org/home/application/application-evaluator-faqs/>

Link to training recording:

draft



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Written Application Executive Summary Template

Executive Summary	
School Name	
Founder Name	
Location	
Grades Served	
Mission	
Target Population	
Evidence of Community Support	
Instructional Model	

Proposed Grades and Enrollment		
Contract Year	Grade Level(s)	Enrollment
Year 1		
Year 2		
Year 3		
Year 4		
Year 5		
At Capacity		

Governing Board Members	
# of Members with experience related to:	
	Education
	Legal Compliance
	Real Estate and Facilities
	Financial Management or Accounting
	Fundraising & Development
	Community Engagement

School Leader	
Name	
Experience	
If not yet Identified, the search criteria and timeline	

Academic Program	
Instructional Design	
Type of Learning Environment	
Class Size and Structure	
Curriculum Overview	
Teaching Methods	

Financial Plan				
Financials submitted are adequate		YES		NO
Overview of Financial Plan				
Fundraising Contributions or Grants				

Operations	
Student Recruitment Plans	
Facilities Plan Including Back-up Plan(s)	



Proposed School Application Evaluation Criteria

Per the Montana Community Choice Schools Commission's (Commission's) proposed Community Choice School (School) application process, this rubric will be used to evaluate each received application. Application approval will only be granted to applicants that have demonstrated competence in each element of the published approval criteria and are likely to open and operate a successful Community Choice School.

"Demonstrated competence in each element" refers to the statutory requirement found in ([20-11-11 \(13\)\(a\) MCA](#)). The Commission interprets this requirement to mean that applicants must go beyond general statements of intent or theoretical plans by providing clear, measurable, and evidence-based indications of their ability to effectively address each key component outlined in the application process for establishing a Community Choice School in Montana. This will ensure that only well-prepared and capable organizations and individuals are authorized to operate schools, ultimately prioritizing the success and well-being of students and families.

Applicants should also demonstrate an understanding of the Commission's Performance Framework for Oversight and Evaluation.

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 open and operate a quality charter school. It goes above and beyond expectations with supporting evidence.
- **Meets:** The response demonstrates a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter 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.
- **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 plan, including if the applicant does not respond to the required section.

The Overall Section Rating should 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 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 evaluators in having a rigorous discussion about the applications, in making recommendations to the Commission, 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 opening a successful Choice School. **Categories such as projected enrollment, proposed budget, cohesive academic program, and special education preparedness merit greater consideration.**

Evaluation Criteria Table of Contents

Section I:	Executive Summary
Section II:	Board Governance and School Leadership
Section III:	Academic Program and Performance
Section IV:	Operations Plan
Section V:	Financial Plan
Section VI:	Special Situations - Conversion, Education Service Providers, Virtual, Out-of-State Providers
Section VII:	Start-up Plan
Section VIII:	Optional Information
Section IX:	Summary and Recommendation

Section I: Executive Summary

<div>Criteria</div> <ul style="list-style-type: none">● Mission: The proposed school’s mission and vision are clearly articulated and realistic. The mission outlines the proposed school’s purpose, what it does, and for whom.● Target Population: clear description of, and rationale for, the target student population.● Community Support: evidence that there is sufficient need for the proposed school in the identified community. Applicant has provided evidence of community outreach activities that have resulted in support of the proposed school. Evidence can include completed intent to enroll forms, partnerships, business relationships, etc.● Pedagogy: clearly and succinctly described the key design elements and approach to instruction and assessment for the proposed school. The pedagogy described supports the stated mission and vision.● Location: The proposed school’s location is identified.● Grades Served: The proposed grades served meet the needs of the identified community.● Planned Enrollment: The proposed minimum, planned, and maximum enrollment each year for the term of the charter contract is identified and reflects the proposed community. <div>Primary Capacities</div> <ul style="list-style-type: none">● Strategic Focus on Mission● Community Commitment	Areas of Strength		Areas of Concern					
	Questions							
Rating		Does Not Meet the Standard		Partially Meets the Standard		Meets the Standard		Exceeds the Standard

Section II: Board Governance and School Leadership

Criteria	Areas of Strength	Areas of Concern		
<ul style="list-style-type: none"> Bylaws: at minimum, addresses the board appointment/election process, board member criteria, board size, terms and term limits, board member duties and expectations, board meeting cadence, attendance and quorum requirements, procedures for board meetings and voting, board officers and their roles, board committees, board member removal, and board member succession plans. Board Members: collective experience and expertise related to education, legal compliance, real estate and facilities, financial management or accounting, fundraising and development, and community engagement; and Proposed School Leader: experienced school leader of student populations that are similar to those that the proposed community choice school will enroll. OR Applicant details sound and comprehensive process to recruit a qualified school leader, including criteria and timeline that will be used. Proposed management team: experienced in operating schools (with similar student body makeup), and the applicant demonstrates the effectiveness of the operator in the following areas: academics, operations, and financial oversight. OR Applicant details sound and comprehensive process to recruit a qualified management team, including criteria to be used and a timeline. 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 		
Primary Capacities <ul style="list-style-type: none"> Strategic Focus on Mission Community Commitment Building a Coalition Team Awareness 	Questions <ul style="list-style-type: none"> 			
Rating	Does Not Meet the Standard	Partially Meets the Standard	Meets the Standard	Exceeds the Standard

Section III: Academic Program and Performance

Criteria

- **Academic Program:** states the academic standards and graduation requirements (if applicable), and includes research-based evidence that the program is effective in meeting the needs of the target population and is aligned with stated standards and graduation requirements. For unique or innovative practices, the applicant presents a compelling rationale for effectiveness.
- **Standardized Assessment:** identified to formally measure student achievement and growth and provides rationale for the chosen assessment.
- **Instructional Design and Curriculum:** includes research-based evidence that they are effective in meeting the needs of the target population. The classroom size and structure are thoroughly explained. Teaching methods are explained and supported with research-based evidence.
- **Learning Environment:** student behavior expectations and a plan to teach and reinforce the expectations. The applicant includes discipline policies that align with federal requirements. The discipline policies are appropriate for all students and distinguish and support any policy differences for special education students. The applicant's approach to discipline is in alignment with the school's mission and is culturally responsive to the target student population.
- **Assessment Plan:** details beyond the annual standardized assessment, provides rationale for assessment plan, and clearly explains how it will evaluate student needs and measure the effectiveness of the academic program.
- **Special Education Program:** The applicant demonstrates an understanding of legal requirements and dedicated appropriate

Areas of Strength

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Areas of Concern

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Questions

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<p>resources to identify students and implement high-quality services and supports for students with disabilities.</p> <ul style="list-style-type: none">● English Language Learners: understanding of legal requirements and dedicated appropriate resources to identify students and implement high-quality services for students who are English Language Learners.● Gifted Program: understanding of legal requirements and dedicated appropriate resources to identify students and implement high-quality services for gifted students.● Academically Challenged Students: understanding of legal requirements and dedicated appropriate resources to implement high-quality services for students who are academically challenged and/or performing below grade level.● Professional Development Plan: for the preoperational year and the first year of operation. The plan articulates how it will support staff and ensure the proposed program is implemented with fidelity.● Co-curricular or Extracurricular Programs: plans to implement such programs, including funding and the proposed delivery of the programs. OR why the proposed choice school has chosen to not offer cocurricular or extracurricular programs. <p>Primary Capacities</p> <ul style="list-style-type: none">● Strategic Focus on Mission● Community Commitment● Reflective Learning● Knowledge, Skills, and Execution								
Rating		Does Not Meet the Standard		Partially Meets the Standard		Meets the Standard		Exceeds the Standard

Section IV: Operations Plan

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Student Recruitment and Enrollment Plan: detailed for the target population. A lottery procedure is described that meets all legal requirements. • Calendar and Daily Schedule: aligns with the proposed school's mission and key design elements. • Organizational Structure and Staffing Plan: aligns with the proposed school's mission and key design elements. The applicant clearly delineates the roles and powers of the board, school administration, advisory bodies, and any additional external organizations. • Staffing Plan: staffing chart for year one and staffing plan for the term of the charter contract demonstrate a priority on implementing the proposed school's identified education program with fidelity. • Recruiting and Development: recruitment and professional development plans are based on evaluated teacher needs, are aligned to the proposed school's mission, and are designed to help teachers meet school goals. • Evaluation: school leadership and staff evaluation plan that aligns with the school's mission and encourages continuous improvement. • Parent Involvement: identified opportunities and expectations for parents to be involved at the school. Applicant makes it clear that all student enrollment is not dependent on parental participation in activities or opportunities. • Contractual Relationships: identify those required for the proposed school to begin and maintain operations with an anticipated timeline for execution of the contracts. The contractual relationships described are free of any actual or 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	<div>Questions</div> <ul style="list-style-type: none"> • 	

<p>perceived conflicts of interest between the applicant and the contractor.</p> <ul style="list-style-type: none">● Transportation: evidence of consideration of student transportation needs and has developed an adequate policy and recommendations for parents to address those needs. The applicant describes the process for safe drop off and pick-up of students.● Food Service: evidence of consideration of student needs and has developed an adequate plan to address those needs. The applicant has a plan to meet the needs of students who meet free and reduced-price meal eligibility guidelines for both breakfast and lunch.● Facility: thorough understanding of the facility needs for the proposed school and includes back-up and contingency plans should the facility not meet particular deadlines. Plans for construction, including a timeline and anticipated cost. Understanding of legal requirements for school facilities in Montana. <p>Primary Capacities</p> <ul style="list-style-type: none">● Strategic Focus on Mission● Community Commitment● Building a Coalition● Reflective Learning● Creative Problem Solving● Effective Decision Making● Relationship with Success and Failure● Team Awareness● Knowledge, Skills, and Execution								
Rating		Does Not Meet the Standard		Partially Meets the Standard		Meets the Standard		Exceeds the Standard

Section V: Financial Plan

Criteria

- **Financial Policies:** plan demonstrates the applicant has personnel and/or a management company with governmental accounting experience in place and the plan follows generally acceptable accounting practices. The financial controls described ensure that adequate auditing and reporting procedures are in place.
- **Insurance:** plan is in place to obtain all required coverage from a reputable provider.
- **Start-up Budget:** for years 0 through 5 is based on realistic assumptions for all revenues and expenditures and does not count on uncommitted funds for a balanced budget.
- **Operational Budget:** includes reasonable and adequate costs for all staff, services, supplies, equipment, and technology included in the application and/or essential to the school implementing the proposed model with fidelity.
- **Cash Flow:** start-up and first year projections are based on realistic assumptions.
- **Fundraising:** evidence of fundraising contributions (e.g. letters of commitment from individuals and organizations), if mentioned in the financial plan.

Primary Capacities

- Strategic Focus on Mission
- Community Commitment
- Effective Decision Making
- Knowledge, Skills, and Execution

Areas of Strength

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Areas of Concern

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Questions

•

Rating

Does Not Meet
the Standard

Partially Meets
the Standard

Meets
the Standard

Exceeds
the Standard

Section VI: Special Situations - School Conversion

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Petition of Support: included • Evidence of Past Performance: is true and complete and describes the school's current capacity for growth that is realistic and evidence-based. • Within Third-class District or School: <ul style="list-style-type: none"> • The third-class district has elected to establish a community choice school; • The third-class district has elected to convert a grade or grades to a choice school from an existing school; • The choice school is a tribal choice school; • The choice school is a virtual community choice school; or • The governing board of the choice school has received approval, by a majority vote, of a memorandum of understanding from the third-class school district's board of trustees. <p>Primary Capacities</p> <ul style="list-style-type: none"> • Community Commitment • Building a Coalition • Effective Decision Making • Knowledge, Skills, and Execution 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	Questions	
	<ul style="list-style-type: none"> • 	
<p>Rating</p>	<p>Does Not Meet the Standard</p>	<p>Meets the Standard</p>

Section VI: Special Situations - Educational Service Providers

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Student Population: demonstrated success with students similar to the targeted population, including academic achievement and successful management of nonacademic school functions. • Contract: proposed duration of the contract with the educational service provider. • Roles and Responsibilities: defined for the governing board, the school staff, and the educational service provider. The roles and responsibilities are appropriate under Montana state law, and will support the proposed school's educational model. • Services and Resources: provided by the educational service provider detailed. The services to be provided are appropriate under Montana state law and will support the proposed school's educational model. • Evaluation of ESP: method and timeline described • Contract: methods that will be used to oversee and enforce the contract with the proposed ESP are detailed. • Renewal and Termination: investment disclosure and conditions for the proposed ESP are described. • Conflicts of Interest: disclosures and explanations of any existing real or potential conflicts of interest between the governing board and the proposed ESP, or any affiliated business entities are included. <p>Primary Capacities</p> <ul style="list-style-type: none"> • Strategic Focus on Mission • Community Commitment • Building a Coalition • Effective Decision Making • Knowledge, Skills, and Execution 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	<p>Questions</p> <ul style="list-style-type: none"> • 	
<p>Rating</p>	<p>Does Not Meet the Standard</p>	<p>Meets the Standard</p>

Section VI: Special Situations - Virtual School

Criteria	Areas of Strength	Areas of Concern
<ul style="list-style-type: none"> • Course Credits: description of the proposed school's system and how the proposed system compares with Montana law. • Compliance: description of how the proposed school will monitor and verify full-time student enrollment, student participation in a full course load, credit accrual, and course completion. The plan is complete and demonstrates a thorough understanding of the considerations and requirements in developing and operating a virtual school. • Student Progress and Performance: describes how the proposed school will monitor and verify student progress and performance in each course through regular, proctored assessments and submissions of coursework and parent-teacher conferences. The plan is complete and demonstrates a thorough understanding of the considerations and requirements in developing and operating a virtual school. <p>Primary Capacities</p> <ul style="list-style-type: none"> • Effective Decision Making • Knowledge, Skills, and Execution 	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
	Questions	
	<ul style="list-style-type: none"> • 	
<p>Rating</p>	<p>Does Not Meet the Standard</p>	<p>Meets the Standard</p>

Section VI: Special Situations - Out of State Providers

<div>Criteria</div> <ul style="list-style-type: none">Past Performance: evidence of past performance of all schools currently in operation across the nation.Portfolio of Schools Status: The applicant identifies all schools that were closed or charters that were revoked or not renewed for any reason.Capacity for Growth: current capacity and plans for developing capacity to support the proposed school in Montana. The applicant’s plan is well-reasoned and supported by evidence. <div>Primary Capacities</div> <ul style="list-style-type: none">Effective Decision MakingRelationship with Success and FailureKnowledge, Skills, and Execution	Areas of Strength		Areas of Concern	
	<div></div>		<div></div>	
	Questions			
	<div></div>			
Rating		Does Not Meet the Standard		Meets the Standard

Section VII: Start-up Plan

<div>Criteria</div> <ul style="list-style-type: none">The applicant has provided a clear and detailed start-up plan. The plan identifies specific tasks, includes timelines, and identifies responsible individuals for each task. The plan is realistic and lends itself to a successful community choice school opening. <div>Primary Capacities</div> <ul style="list-style-type: none">Effective Decision MakingRelationship with Success and FailureKnowledge, Skills, and Execution	Areas of Strength		Areas of Concern	
	<div></div>		<div></div>	
	Questions			
	<div></div>			
Rating		Does Not Meet the Standard		Meets the Standard

Section VIII: Optional Information

Submitted (indicate by checking box)

- ☐ Pedagogical Approach
 - Description of educational approach/model behind why this curriculum and community
- ☐ Indian Education for All
 - Description of how Indian Education for All is included within the curriculum
- ☐ Governing Board Training
 - description of onboarding and planned training of board members
- ☐ Post Secondary Readiness
 - Description of how the educational approach/model prepare students to meet the standards for acceptance into the Montana University System
- ☐ Student & Staff Wellbeing
 - plan to attend to the mental well-being of the students and overall school community including what resources will be available for families
- ☐ Parent Family & Community Engagement
 - plans for meaningful engagement supportive of the initial and continued development of the school, including detailed plans for keeping parents, families, and the greater community informed and involved in your Choice School
- ☐ Facility
 - Describe a plan and timeline to secure a facility that meets the needs of the proposed learning programs and complies with health, safety, and local code requirements for a school.

Primary Capacities

- Effective Decision Making
- Relationship with Success and Failure
- Knowledge, Skills, and Execution

Areas of Strength

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Areas of Concern

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Questions

•

Summary Evaluation and Recommendation

The following universal criteria should be demonstrated throughout a proposed school application.

- The proposed school's mission, vision, and key design elements of the educational model are consistent throughlines in the application; responsive to the community the school seeks to serve; and grounded in sound research, proven practice, and/or other reasons demonstrating likely effectiveness.
- The founding team has the capacities and commitment to successfully launch and operate the proposed school.
- The financial and operational plans and assurances are viable, meet legal requirements, and are aligned throughout the application.

Areas of Strength	Areas of Weakness/Concern
•	•

Overall Rating	Rating Definition
	Exceeds: The response demonstrates a strong understanding of key issues and demonstrates capacity to open and operate a quality charter school. It goes above and beyond expectations with supporting evidence.
	Meets: The response demonstrates a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter 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.
	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 plan, including if the applicant does not respond to the required section.



Public Forum Procedures for Members

Policy Related to Public Forum

The Commission's Application Review Subcommittee and Director will attend a Public Forum hosted by the Applicant Team in their local community. The Applicant Team will make a presentation of their proposed school to the resident community followed by an opportunity for public comment. This provides the Commission with an additional indicator of community interest and applicant preparedness.

Logistics

- Dates: TBD/February and March
- Notice to Community: The Applicant Team will be responsible for making notice to the community
- Duration: 60 minutes
- Scheduling: Commission Director will coordinate scheduling with the main contact on the Written Application
- Posting: Meeting agenda, time, location posted on BPE website
- Attendees: Commission Application Subcommittee Members, Commission Director, Applicants, interested members of the local community
- Location: In person in the local community where the school will operate (preferably in the proposed school building if possible)

Public Forum Schedule

- Introductions & Overview (10 mins)
- Presentation of the Proposed School Model (20 mins)
- Public Comment (30 mins)

Commission Debrief Immediately Following the Forum

- Application Subcommittee Members and Director debrief on the following topics for possible follow-up in the Applicant Interview:
 - Applicants understanding of community needs
 - Applicants outreach efforts/participation
 - Applicants ability to build authentic relationships with families and stakeholders



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Public Forum Notes Template

Applicant Team					
School Name					
Location					
Applicant Team Members Present					
Notes on Applicants Presentation					
Community Engagement					
# of Community Members Present		# Community Members in Support		# Community Members Opposed	
Notes on Public Comment					
Follow-up Questions for Applicant Interview					



Application Interview Procedures for Members

Policy Related to Conducting Applicant Interviews

The Commission's Application Review Subcommittee and Director will conduct an interview with each Applicant Team. The interview allows the Commission to seek clarification on content submitted in the Application, and the interview is also an opportunity to go deeper into the Applicant Team's capacity, connection with community, and ability to problem solve via challenge scenarios.

Logistics

- Notice to Applicants: Included in Application Directions posted on BPE website
- Dates: TBD/March or April
- Duration: 90 minutes
- Scheduling: Director to schedule with applicant within 3 days of application receipt
- Attendees: Commission Application Subcommittee Members, Commission Director, Applicants
- Location: Helena or TBD

Commission Member Preparations

- Selection of questions: A list of questions and challenge scenarios are provided as a resource, each team member should select questions appropriate to each application to dig deeper into the team's ability to elaborate on their model, capacity to offer multiple layers of solutions to challenges, and their efforts to connect to the community.
- Application Subcommittee Members and the Director will convene on-line one week prior to conducting interviews to discuss questions & scenarios for each applicant as well as general purpose and approach to each interview. Each Member will select questions & send to the director to compile the final list, eliminating duplicants & organizing by topic/area.

Interview Schedule

- Commission Introductions & Overview (10 mins)
- Founding Team Introductions (10 mins)
 - Invite the founding team to BRIEFLY introduce themselves and share their current and potential future role with the proposed school and their personal "why" for founding this school
- Interview Questions and Challenge Scenario (60 mins)
 - Ask probing questions based on the review team's assessment of the written application and other touchpoints to date. Focus questions on the people, model, and execution; assess for preparedness to move to the next stage of start-up.
- Closing (10 mins)
 - Provide an overview of the next steps in the application process. Invite questions related to the process from the founding team.

Commission Debrief Immediately Following the Interview

- Application Subcommittee Members and Director discuss responses including interpretation of the team's ability to elaborate on their model, their capacity to offer multiple layers of solutions to challenges, and their efforts to connect to the community.

Resources

- [NACSA Guide to New School Applications](#)
- [NACSA Capacity Interview Guidelines](#)
- [NACSA Capacities of Founding Teams](#)
- [NCSI Bold by Choice Episode Three: The Charter Application](#)



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Application Interview Template

This template is intended to help the Application Review Subcommittee prepare for and conduct an effective interview by distilling the most critical issues and concerns from the application review findings. As there may not be enough time to cover everything the team would like to address, it is important to identify priorities and ensure adequate time to address those priorities in depth. With that in mind, not every section of the application will be addressed in the interview. The focus should be on the sections that may have elicited concern and/or lacked a clear and comprehensive plan.

Within each interview 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 open and operate a quality charter school. It goes above and beyond expectations with supporting evidence.
- **Meets:** The response demonstrates a thorough understanding of key issues and demonstrates capacity to open and operate a quality charter 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.
- **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 plan, including if the applicant does not respond to the required section.

Executive Summary				
Questions		Response Notes		
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds				
Executive Summary Evaluation Comments				

People	
Community & Coalitions	
Questions	Response Notes
Founding Team	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
People Evaluation Comments	

Model	
Mission, Vision, Purpose	
Questions	Response Notes
Key Design Elements	
Questions	Response Notes
Outcomes	
Questions	Response Notes

Community Needs, Challenges, and Opportunities	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
Model Evaluation Comments	

Execution	
Organizational Systems	
Questions	Response Notes
Plan of Execution	
Questions	Response Notes
Policies and Assurance	
Questions	Response Notes

Financial Plan	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
Execution Evaluation Comments	

Facility Plan	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
Facility Plan Evaluation Comments	

Educational Service Provider	
Questions	Response Notes
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds	
Education Service Provider Evaluation Comments	

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Team Challenge Scenario			
Scenario		Response Notes	
Evaluation Rating: <input type="checkbox"/> Does Not Meet <input type="checkbox"/> Partially Meets <input type="checkbox"/> Meets <input type="checkbox"/> Exceeds			
Team Challenge Scenario Evaluation Comments			



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Application Final Recommendation

Executive Summary	
School Name	
Founder Name	
Location	
Grades Served	
Mission	
Target Population	
Instructional Model	

Public Forum Summary	
Team's understanding of community need	
Team's ability to build authentic relationships with families and stakeholders	
Outreach efforts/participation	

Interview Summary	
Team's ability to elaborate on their model	
Team's capacity to offer multiple layers of solutions to challenges	
Team's efforts to connect to the community	

Final Recommendation to Commission	
Approve	
Rationale	
Conditions	
Deny	
Rationale	
Feedback	



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(School Name)

Annual Report of Academic,
Operational, and Financial Performance

(Date)

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Section I:	School Overview
Section II:	Performance Framework Summary
Section III:	Academic Performance
Section IV:	Operational Performance
Section V:	Financial Performance
Section VI:	Commission Notes
Section VII:	School Reflection

SECTION I: SCHOOL OVERVIEW		
School Name		
Location		
Mission		
School Leader		
Governing Board Chair		
Year of Charter Contract		
Student Demographics	Grades Served	
	Enrollment	
	% F/RL	
	% American Indian	
	% White	
	% Special Education	
	% English Language Learners	
	Other (indicate)	

SECTION II: PERFORMANCE FRAMEWORK SUMMARY				
	Exceeds	Meets	Approaches	Does Not Meet
Academics	#	#	#	#
	%	%	%	%
Operational	#	#	#	#
	%	%	%	%
Financial	#	#	#	#
	%	%	%	%

SECTION III: ACADEMIC PERFORMANCE FRAMEWORK

LITERACY PROFICIENCY				
STUDENTS		PERFORMANCE DESCRIPTOR	RATING	SCHOOL'S ACTUAL PERFORMANCE
All Students		eg: The school's growth rate is at or above the 90 th percentile.	Exceeds	95th Percentile
Subgroups	F/RL			
	American Indian			
	White			
	Special Education			
	ELL			
	Other (indicate)			

LITERACY GROWTH				
STUDENTS		PERFORMANCE DESCRIPTOR	RATING	SCHOOL'S ACTUAL PERFORMANCE
All Students				
Subgroups	F/RL			
	American Indian			
	White			
	Special Education			
	ELL			
	Other			

MATH PROFICIENCY				
STUDENTS		PERFORMANCE DESCRIPTOR	RATING	SCHOOL'S ACTUAL PERFORMANCE
All Students				
Subgroups	F/RL			
	American Indian			
	White			
	Special Education			
	ELL			
	Other (indicate)			

MATH GROWTH				
STUDENTS		PERFORMANCE DESCRIPTOR	RATING	SCHOOL'S ACTUAL PERFORMANCE
All Students				
Subgroups	F/RL			
	American Indian			
	White			
	Special Education			
	ELL			
	Other			

POST SECONDARY READINESS			
MEASURE	PERFORMANCE DESCRIPTOR	RATING	SCHOOL'S ACTUAL PERFORMANCE
Adjusted Cohort Graduation Rate			

SCHOOL’S SELF-REFLECTION: ACADEMIC PERFORMANCE	
Areas of Strength	
Areas for Improvement	

SECTION IV: OPERATIONAL PERFORMANCE FRAMEWORK

ATTENDANCE, ENROLLMENT, GOVERNANCE, & COMPLIANCE			
MEASURE	PERFORMANCE DESCRIPTOR	RATING	SCHOOL'S ACTUAL PERFORMANCE
Average Daily Attendance			
Recurrent Enrollment			
Board Governance			
Operational Compliance			

SCHOOL'S SELF-REFLECTION: OPERATIONS	
Areas of Strength	
Areas for Improvement	

SECTION V: FINANCIAL PERFORMANCE FRAMEWORK

NEAR TERM HEALTH				
MEASURE	CALCULATION & DATA SOURCE	PERFORMANCE DESCRIPTOR	RATING	SCHOOL'S ACTUAL PERFORMANCE
Current Ratio	Current Assets divided by Current Liabilities S: Annual Fiscal Audit			
Unrestricted Days Cash	Unrestricted Cash and investments divided by ((Total Expenses minus Deprecation Expense) / 365). S: Annual Fiscal Audit			
Default	S: Annual Fiscal Audit Report, Terms of Debt, Other Formal Notifications			
Enrollment Variance	Actual Enrollment vs. Budgeted			

SUSTAINABLE HEALTH				
MEASURE	CALCULATION & DATA SOURCE	PERFORMANCE DESCRIPTOR	RATING	SCHOOL'S ACTUAL PERFORMANCE
Total Margin and 3-Year Aggregated Total Margin	Most Recent Year Total Margin: e.g., 2025 Net Income divided by 2025 Total Revenue. 3-Year Aggregated Total Margin: (2025 Net Income +2024 Net Income +2023 Net Income) divided by (2025 Total Revenue +2024 Total Revenue +2023 Total Revenue) S: Annual Fiscal Audit			
Debt Service Coverage Ratio	If school owns its facility or if the school leases its facility and the lease is capitalized: (Net Income + Depreciation Expense + Interest Expense) divided by (Principal + Interest + Lease Payments) OR If school leases its facility and the lease is not capitalized: (Facility Lease Payments + Net Income + Depreciation Expense + Interest Expense) divided by (Principal + Interest + Lease Payments) S: Annual Fiscal Audit			

Debt to Asset Ratio	Total Liabilities, excluding pension liabilities, divided by Total Assets, excluding pension assets Data S: Annual Fiscal Audit			
Financial Compliance	Annual Fiscal Audit Report, Desk Audit of Policies, other formal notifications received by school			

SCHOOL’S SELF-REFLECTION: FINANCE	
Areas of Strength	
Areas for Improvement	

SECTION VI: COMMISSION NOTES

Areas of Strength	
Areas for Improvement	

draft



Authorizer Annual Report Requirements

1. Due Date: Authorizer Annual Reports are to be submitted to the Commission Director on or before November 1 of each year.
2. Format: The Authorizer shall use the [Authorizer Annual Report template](#) provided by the Commission.
3. Contents:
 - a. Authorizer's Community Choice Schools Portfolio at a Glance
 - b. Summary Report of Progress based on each school's Performance Framework
 - c. Authorizer's Community Choice School Performance Comparison with Resident District Schools
 - d. Assessment of Successes, Challenges, and Areas for Improvement as outlined below:
 - i. Community Choice Schools Movement Overall
 - ii. Sufficiency of Funding for Community Choice Schools
 - iii. Efficacy of the Commission's Formula for Authorizer Funding
 - iv. Suggested Changes to State Law or Policy Needed to Strengthen Community Choice Schools
 - e. Authorizer Financial Report

Authorizer (name) Annual Report to the
Community Choice Schools
Commission

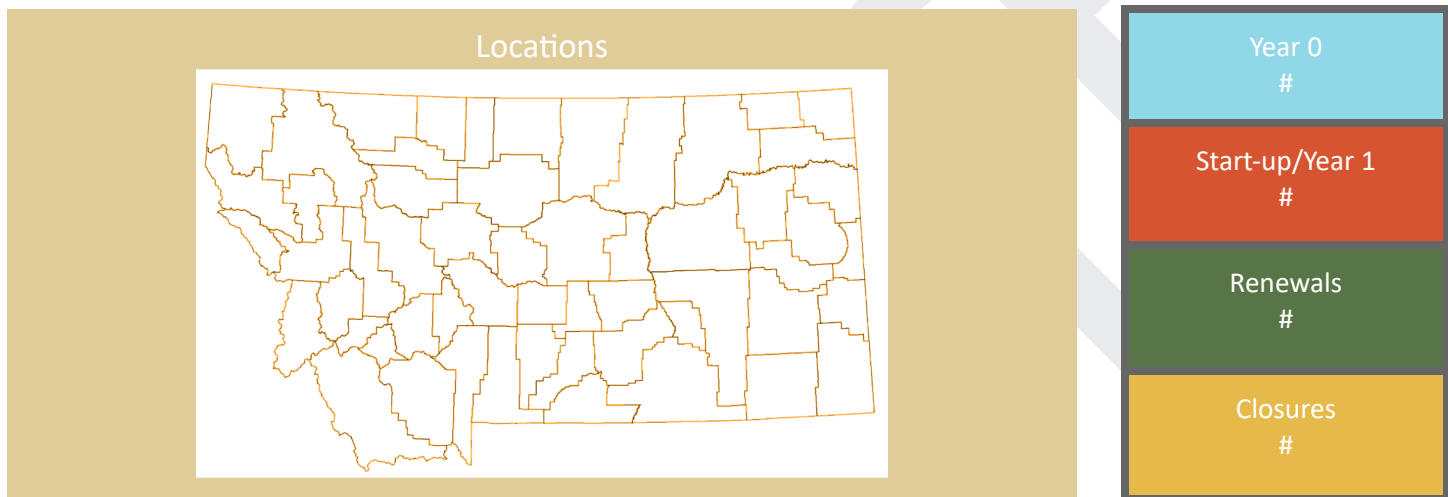
(year)

Report Contents

Section I:	Community Choice Schools Portfolio at a Glance
Section II:	Community Choice Schools Summary Report of Progress
Section III:	Community Choice Schools Performance Comparison with Resident District Schools
Section IV:	Assessment of Successes, Challenges, and Areas for Improvement
Section V:	Authorizer's Financial Report

Section I: Community Choice Schools Portfolio

Community Choice Schools at a Glance				
	Total	Elementary	Middle	High School
Schools	#	#	#	#
Students	#	#	#	#



# Total Students			Model Focus	# Schools
% of Public Education Students				
% Economically Disadvantaged				
% Special Education				
% English Language Learners				
American Indian				

Philanthropy	Partnerships

Section II: Community Choice Schools Performance Summaries

School Name		
Location		
Model		
Mission		
School Leader		
Governing Board Chair		
Year of Charter Contract		
Student Demographics	Grades Served	
	Enrollment	
	% F/RL	
	% American Indian	
	% White	
	% Special Education	
	% English Language Learners	
	Other (indicate)	

PERFORMANCE FRAMEWORK SUMMARY				
	Exceeds	Meets	Approaches	Does Not Meet
Academic	#			
	%			
Operational				
Financial				

Section III: Community Choice Schools Performance Comparison with Resident District Schools

For each school:

- Literacy & Math graphs displaying the growth of students by grade compared to their resident district. Note: the data for the resident school district will not likely be for the same assessment, it may also be a challenge to retrieve.
- Cohort Adjusted Graduation Rate graph for high school compared to the resident district
- Note: longitudinal data will be displayed on each graph as the school progresses in years

Section IV: Authorizer's Assessment of Successes, Challenges, and Areas for Improvement of the Intent of the Law

20-11-102. Community choice schools -- legislative findings and intent. (1) The legislature finds, pursuant to the authority and duties provided in Article X, section 1(3), of the Montana constitution, that:

- (a) parents desire education options for their children;
- (b) expanding educational opportunities for K-12 education within the state is a valid public purpose; and
- (c) creating options that empower parents, encourage students to develop their full educational potential, provide a variety of professional opportunities for teachers, and encourage educational entrepreneurship is vital to the economic competitiveness of the state.

(2) It is the legislature's intent, pursuant to the authority and duties provided in Article X, section 1(3), of the Montana constitution, to create other public educational programs and institutions through choice schools. The purposes are to:

- (a) enable parents to make decisions on how best to educate their children;
- (b) provide other public educational opportunities for all students, especially those at risk of academic failure or academic disengagement;
- (c) encourage the use of different models of teaching, governing, scheduling, and providing instruction to meet a wide variety of student and community needs; and
- (d) advance Montana's commitment to the preservation of American Indian cultural identity, pursuant to Article X, section 1(2), of the Montana constitution, and to eliminate the American Indian achievement gap by encouraging participation in the choice school program by students, parents, and school districts in Indian country.

Community Choice Schools Movement Overall

Successes	
Challenges	
Areas for Improvement	

Sufficiency of Funding for Community Choice Schools

Successes	
Challenges	
Areas for Improvement	

Efficacy of the Commission's Formula for Authorizer Funding

Successes	
Challenges	
Areas for Improvement	

Suggested Changes to State Law or Policy Needed to Strengthen Community Choice Schools

Section of Law

Suggested Amendment

draft

Section V: Authorizer's Financial Report

Oversight Fee Formula	Total Revenue	Total Expenses
Narrative Describing Use of Funds for Oversight Activity		



**MONTANA
COMMUNITY
CHOICE SCHOOLS**

Commission Annual Report to the
Interim Education Committee,
Board of Public Education,
and the Public

(year)

Report Contents

Chair Welcome Letter

- Section I: The Commission
- Section II: Community Choice Schools Portfolio at a Glance
- Section III: Community Choice Schools Summary Report of Progress
- Section IV: Community Choice Schools Performance Comparison
with Resident District Schools
- Section V: Assessment of Successes, Challenges, and Areas for Improvement

Letter from the Commission Chair:

- Highlight accomplishments as whole (schools, movement) and work to be completed

Section I: The Commission

Members	Chair - headshot, name	location, profession, appointing official
	Vice Chair - headshot, name	location, profession, appointing official
	Treasurer - headshot, name	location, profession, appointing official
	Member - headshot, name	location, profession, appointing official
	Member - headshot, name	location, profession, appointing official
	Member - headshot, name	location, profession, appointing official
	Member - headshot, name	location, profession, appointing official



This page held for final Core Values



Our Promise

Our Guiding Principles

1.

Core Values and Commitments

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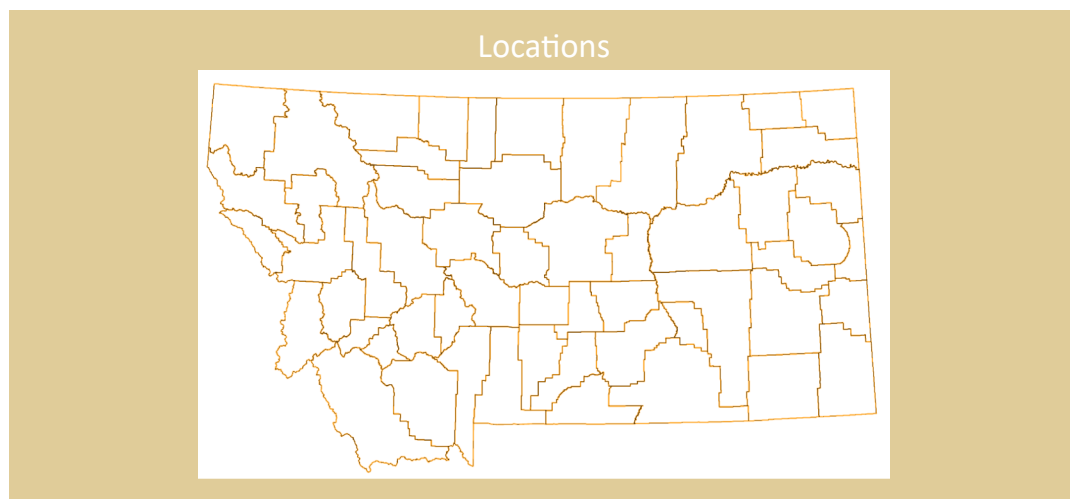
Our Core Purpose

1.

2.

Section II: Community Choice Schools Portfolio

Community Choice Schools at a Glance				
	Total	Elementary	Middle	High School
Schools	#	#	#	#
Students	#	#	#	#



Year 0 #
Start-up/Year 1 #
Renewals #
Closures #

# Total Students			Model Focus	# Schools
% of State Enrollment				
% Economically Disadvantaged				
% Special Education				
% English Language Learners				
American Indian				

PERFORMANCE FRAMEWORK SUMMARY FOR ALL SCHOOLS				
	Exceeds	Meets	Approaches	Does Not Meet
Academic	%	%	%	%
Operational	%	%	%	%
Financial	%	%	%	%

Schools' Philanthropy	Schools' Partnerships

Commission Philanthropy	Commission Partnerships

Section III: Community Choice Schools Performance Summaries

School Name		
Location		
Model		
Mission		
School Leader		
Governing Board Chair		
Year of Charter Contract		
Student Demographics	Grades Served	
	Enrollment	
	% F/RL	
	% American Indian	
	% White	
	% Special Education	
	% English Language Learners	
	Other (indicate)	

PERFORMANCE FRAMEWORK SUMMARY				
	Exceeds	Meets	Approaches	Does Not Meet
Academic	#	#	#	#
	%	%	%	%
Operational	#	#	#	#
	%	%	%	%
Financial	#	#	#	#
	%	%	%	%

Section IV: Community Choice Schools Performance Comparison with Resident District Schools

For each school:

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Community Choice Schools Movement Overall

Successes	
Challenges	
Areas for Improvement	

Sufficiency of Funding for Community Choice Schools

Successes	
Challenges	
Areas for Improvement	

Efficacy of the Commission's Formula for Authorizer Funding

Successes	
Challenges	
Areas for Improvement	

Suggested Changes to State Law or Policy Needed to Strengthen Community Choice Schools	
Section of Law	Suggested Amendment



Commission Request for Professional Development Travel and Non-Travel Expense Approval Procedures Internal Communications Plan

1. Commission Members shall obtain a Request for Professional Development Travel form or the Non-Travel Expense Request form from the Director or retrieve one from the Commission's files.
2. Members shall complete all information called for on the form and send it for approval to the Commission's Treasurer 45 days in advance of when the travel or expense is to be made.
3. The Treasurer shall consider the request, confirm available funds, and approve or deny the request.
4. If approved, the Treasurer will send the approval to the Chair to ensure consensus support for the expenses.
5. If the Chair approves, the Chair shall reply to the Treasurer in email CCing the Director. The Director will notify the Member to proceed with the request for an expenditure as approved.
6. The Director will send each Commission approved request form to the Board of Public Education staff for filing and record keeping no later than 30 days in advance of the travel or expense. BPE staff will acknowledge the receipt of the form in email.
7. If denied by the Treasurer or Chair, the form shall be returned to the Director with rationale. The Director will discuss the denial with the Member.

Fund	Org	Acct Lvl 1	Acct Lvl 2	Revenues	Expenditures	Rev less Exp
08084	Community Choice Schools			327,500.00	185,324.93	142,175.07
	20 Community Choice Schools			327,500.00	185,324.93	142,175.07
		580000 Grants/Transfers/Misc		327,500.00	0.00	327,500.00
			580000 Grants/Transfers/Misc	327,500.00	0.00	327,500.00
		61000 Personal Services		0.00	79,848.17	(79,848.17)
			61100 Salaries	0.00	60,266.81	(60,266.81)
			61400 Employee Benefits	0.00	19,581.36	(19,581.36)
		62000 Operating Expenses		0.00	105,476.76	(105,476.76)
			62100 Other Services	0.00	80,952.14	(80,952.14)
			62200 Supplies & Materials	0.00	1,265.05	(1,265.05)
			62300 Communications	0.00	1,616.36	(1,616.36)
			62400 Travel	0.00	16,582.20	(16,582.20)
			62500 Rent	0.00	546.01	(546.01)
			62800 Other Expenses	0.00	4,515.00	(4,515.00)
Grand Total				327,500.00	185,324.93	142,175.07