

Montana Board of Public Education

Helena Public School District Montessori Public Charter School Application

September 2023

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INTRODUCTION

HB 549 (2023) authorized the establishment of public charter schools in Montana and tasked the Montana Board of Public Education as the sole entity authorized to enter into public charter contracts with a governing board. There are two types of public charter schools – those operating under an existing local school board and those

operating as a new school district under a separate governing board. This Public Charter School Application is for both options.

A public charter school means a public school that has autonomy over decisions including, but not limited to, matters concerning finance, personnel, scheduling, curriculum, and instruction as defined in a public charter contract. Public charter schools are governed by a local school board, or in the case of a governing board other than a local school board, by the governing board of the public charter school district of which the public charter school is a part. Public charter schools are established and operated under the terms of a public charter contract and allow parents to choose to enroll their children. Public charter schools must admit students based on a lottery if more students apply for admission than can be accommodated.

Public charter schools provide a program of education that may include any or all grades from kindergarten through grade 12 and vocational education programs and operate in pursuit of a specific set of educational objectives as defined in its public charter contract.

The evaluation of your application will focus on whether implementing the proposals in your application will lead to the academic, organizational, and financial performance you are promising in exchange for potential broad flexibility from Montana's education standards. The evaluation will also determine whether:

- There is an established need for the proposed public charter school;
- The proposed public charter school meets the needs of all its students;
- The proposed public charter school is of the highest academic quality;
- The proposed public charter school will provide a healthy learning environment and positive school climate;
- The proposed governing board demonstrates the capacity to implement the plan outlined in the application with fidelity; and
- The proposed public charter school will provide an educational opportunity to students that they would not otherwise receive at the traditional school they are zoned to attend.

Applicants are strongly encouraged to review all information and resources available on the Board's webpage under the Public Charter School tab prior to drafting and submitting a public charter school application.

SUBMISSION PROCEDURES

To facilitate the Montana Board of Public Education's review of public charter school applications, applicants must submit the application to bpe@mt.gov no later than November 1, 2023. The Board will review the public charter school application, and if completed, will facilitate an interview, and take public comment on the application at the November 15-17, 2023 Board meeting. Final approval of the application will take place at the January 18-19, 2024 Board meeting.

We recognize that this application does not provide the space to fully and accurately respond to each of the questions in the application. Attachments and appendices are permitted. Please make sure to clearly state where corresponding responses are located within the application.

Please note that submitting a public charter school application does not guarantee that a public charter school contract will be granted. Failure to adhere to any requirements may yield a defective application that is rejected before consideration. In addition, complete applications that are not strong enough to guarantee a successful public charter school implementation will be recommended for denial.

PUBLIC CHARTER APPLICATION COVER PAGE

Check One: New Public Charter under Existing Local School Board New Public Charter District

Montana Board of Public Education September

Name of Public Charter School HPSD Montessori Charter School

Local school district in which the public charter school will be physically located: Helena Public School District (HPSD)

Contact Information for the Governing Board Chair

Contact Person: Siobhan Hathhom
Name

HPSD School Board Chair
Title

Contact Helena Public School District

Address: 1325 Poplar Street, Helena, MT 59601

Telephone Number: (406)324-2026

E-mail Address: boardoftrustees@helenaschools.org

Contact Information for the Person Completing this Application

Contact Person: Rex Weltz
Name

Superintendent
Title

Contact Helena Public School District

Address: 1325 Poplar Street, Helena, MT 59601

Telephone Number: (406)324-2025

E-mail Address: rweltz@helenaschools.org

PUBLIC CHARTER APPLICATION

Name of Public Charter School: _____ HPSD Montessori Charter School _____

Provide an executive summary with the general purpose and rationale for the creation of the public charter school.

The HPSD Montessori Charter School will provide academic instruction through the Montessori model of instruction, available to elementary-aged students. The Montessori Charter School will operate at three sites – Broadwater Elementary, Central Elementary, and Smith Elementary – with plans for expansion. Families of enrolled students will be provided with this alternative option for their student(s) who may benefit from more flexibility, personalization, and self-paced learning environments to support the diverse needs and preferences of individual students and families.

Montessori Charter School will provide personalized learning experiences in which staff, students, and community members work in collaboration to create a rich, engaging learning experience, build vital community partnerships, and support students in an intellectually diverse, active learning community. Trained Montessori teachers will ensure families and students are supported throughout their school journey, offering ongoing individualized academic planning, family support and continuity of services. Montessori Charter School will engage students in a collaborative learning environment with staff and community members to provide engaging learning and teaching experiences, to contribute to significant increases in student retention and graduation rates, and to meet the diverse academic needs of our students. We hope to reengage with 240 students by the end of year 5 with plans to scale programming, pending teacher availability, to meet demand. We believe that Montessori Charter School will provide families choice and students personalized educational experiences and ensure our community continues to have a public Montessori school experience defined by excellence.

Opening Date: August 2024 Public Charter Term Length: 9 months/year
 Grades to be served: K-5
 Minimum Enrollment Per Year: 160
 Planned Enrollment Per Year: 180
 Maximum Enrollment Per Year: 240

For each year of the public charter term, indicate the number of students the public charter school plans to serve in each grade.

	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
Year 1	18	36	36	36	36	36								198
Year 2	36	36	36	36	36	36								216
Year 3	36	48	48	36	36	36								240
Year 4	36	48	48	48	36	36								252
Year 5	36	48	48	48	48	36								264

ACADEMIC PROGRAM

We recognize that this section does not provide the space to fully and accurately respond to each of the questions below. Attachments and appendices are permitted. Please make sure to clearly state where corresponding responses are located.

1. State the public charter school's mission and vision and describe why this initiative is important to the community it will serve.

Our Vision: HPSD Montessori Charter School will foster dynamic educational experiences that prepare students for life.

Our Mission: HPSD Montessori Charter School will educate, engage, and empower each student to maximize their individual potential with the knowledge, skills, and character essential to being a responsible citizen and life-long learner. This mission will be supported through the wise use of resources to meet students' needs, regardless of interests and talents. Students, families, educators, and the community are committed to sharing the responsibility for creating a student-centered educational community that acknowledges learning as a life-long process.

2. Identify the targeted student population and the community the public charter school proposes to serve.

HPSD Montessori Charter School will be open to any family who wishes to consider a Montessori learning experience for their child. This year an early literacy pilot class of Kinder Sprouts was offered to qualifying 4- and 5-year-olds who are being served in an early childhood Montessori learning environment. We hope to expand this Montessori program to address the early literacy gaps of some of our youngest learners and to provide additional opportunities for students' families to choose this model of instruction for their child.

The Montessori Sprouts classrooms will follow HB 352, which focuses on targeted intervention for reading proficiency.

3. Describe plans and timelines for student recruitment and enrollment, including lottery procedures.

HPSD Montessori Charter School is open to students in grades K-5 within the Helena Public School District. Admission will be offered through a lottery system, available to all K-5 HPSD students, depending on availability of student openings. To be eligible, children must reside within the HPSD boundaries or be enrolled in an HPSD kindergarten class. In the first two years, there will be 36 guaranteed openings for rising 1st graders, with an additional 12 openings in subsequent years. Our goal will be to provide choice to families who wish for their child to have Montessori instruction.

The demand for Montessori education in HPSD is already strong, with an average of 90 lottery applications for the annual lottery, which offers only 36 spots in our existing Montessori classrooms. In year 3, the additional pod will be located in the Helena Valley, addressing the significant underserved Montessori enrollment in that area.

Please see the HPSD Montessori Charter registration form example (Appendix 1).

4. Describe the public charter school’s academic program, specifically focusing on why it is innovative in your school district. Include plans to formally assess student achievement on an annual basis.

Montessori is an innovative method of education that is based on self-directed activity, hands-on learning, and collaborative peer coaching. It is an educational approach which offers age-appropriate activities to guide children’s learning while allowing them to make creative choices. The Montessori method focuses on independence and rigorous, self-motivated growth for children in all areas of their development.

- Each child is valued as a unique individual. Montessori education recognizes that children learn in different ways and accommodates all learning styles. Students are free to learn at their own pace, advancing as they are ready, guided by the teacher and an individualized learning plan.
- Beginning at an early age, Montessori nurtures order, concentration, and independence. Intentional classroom design, materials, and daily routines support the student’s emerging “self-regulation” (the ability to educate oneself, and to think about what one is learning) in toddlers through adolescents.
- Students are part of a close, caring community. The multi-age classroom – typically spanning 3 years – re-creates a family structure. Older students enjoy stature as mentors and role models and reinforce their own learning by teaching concepts they have already mastered; younger children feel supported and gain confidence about the challenges ahead through observation. Teachers model respect, loving kindness, and peaceful conflict resolution.
- Montessori students enjoy freedom within limits. Working within parameters set by their teachers and the classroom community, students are active participants in deciding what their focus of learning will be.
- Students are supported in becoming active seekers of knowledge. Teachers provide environments in which students have the freedom and the tools to pursue answers to their own questions. Internal satisfaction drives the child’s curiosity and interest and results in joyous learning that is sustainable over a lifetime.
- Self-correction and self-assessment are an integral part of the Montessori classroom approach. As they mature, students learn to look critically at their work and become adept at recognizing, correcting, and learning from their errors.

Student achievement will be assessed on an ongoing basis. It will consider the subject matter, the grade level, and the students’ individual needs. The assessment practices will align with learning objectives and state standards, ensuring that students are achieving the intended outcomes, and the assessments will inform instructional decisions and support student growth.

5. Describe any variances to existing standards that the public charter school requires to enhance educational opportunities.

The Montessori Charter School does not plan to seek any variances to existing standards to enhance the educational opportunities for our students.

6. Describe the instructional design, including the type of learning environment, class size and structure, curriculum overview, and teaching methods.

HPSD Montessori Charter School will provide a unique learning environment rooted in Montessori principles. Our trained Montessori teachers will continue to foster a culture of mutual respect between

adults and students, creating a personalized and engaging educational experience. Each Montessori classroom will be led by a trained teacher with additional support in line with traditional classrooms, such as special education, music, PE, library, and para-educator assistance.

Students will work individually or in small groups, allowing for meaningful discussions and choices in lesson scheduling. This autonomy will encourage independent learning and time management skills. Each Montessori Charter School room will have well-defined areas for different parts of the curriculum including:

- Practical Life, which helps build everyday living skills.
- Sensorial, which helps develop sensory skills.
- Math.
- Language.
- Culture, which includes music, art, geography, and science.

Montessori education also emphasizes cultural and global awareness, involving both immediate and extended families in the school culture. Family members' diverse experiences help to enrich the curriculum, promoting empathy and multicultural appreciation.

7. Describe plans for identifying and successfully serving students with disabilities, students who are English Language Learners, students who are academically challenged, and gifted students, including compliance with applicable laws and regulations.

The Montessori Method, often seen as an alternative to traditional classrooms, caters to a diverse student population. It offers a personalized learning approach, enabling students to explore and progress at their own pace and fostering practical application of their learning. In multi-age classrooms, students interact with peers, gaining varied perspectives on problem-solving and relationships. This approach is particularly effective for students with learning challenges who may need extra time and support for problem-solving. It also benefits those who thrive on personal interactions with peers and teachers. In this flexible environment, gifted students can delve deeper into subjects, pursue their interests, and continually strive for their personal best. Students with identified learning needs receive the necessary accommodations, adaptations and support. Teachers are trained to maintain an open and exploratory classroom atmosphere while being ready to provide individualized support when needed.

8. Describe student discipline policies, including those for special education students.

Student discipline policies, including those for special education students, are posted on the HPSD website: helenaschools.org

[Series 2000: Student Instruction | Helena Public Schools \(helenaschools.org\)](http://helenaschools.org)

[Series 3000: Students | Helena Public Schools \(helenaschools.org\)](http://helenaschools.org)

Special Education: [3060-Misconduct-by-Students-with-Disabilities.pdf \(helenaschools.org\)](http://helenaschools.org)

Please see the HPSD Montessori Charter Handbook example (Appendix 2).

Students with special needs, such as learning or physical disabilities, often thrive in a Montessori setting. Materials used in Montessori settings engage all the senses. Students are free to move about the classroom, which is an advantage for those children who require a lot of physical activity. Each child learns at their own pace, and there is no pressure to meet formal standards by a predetermined time.

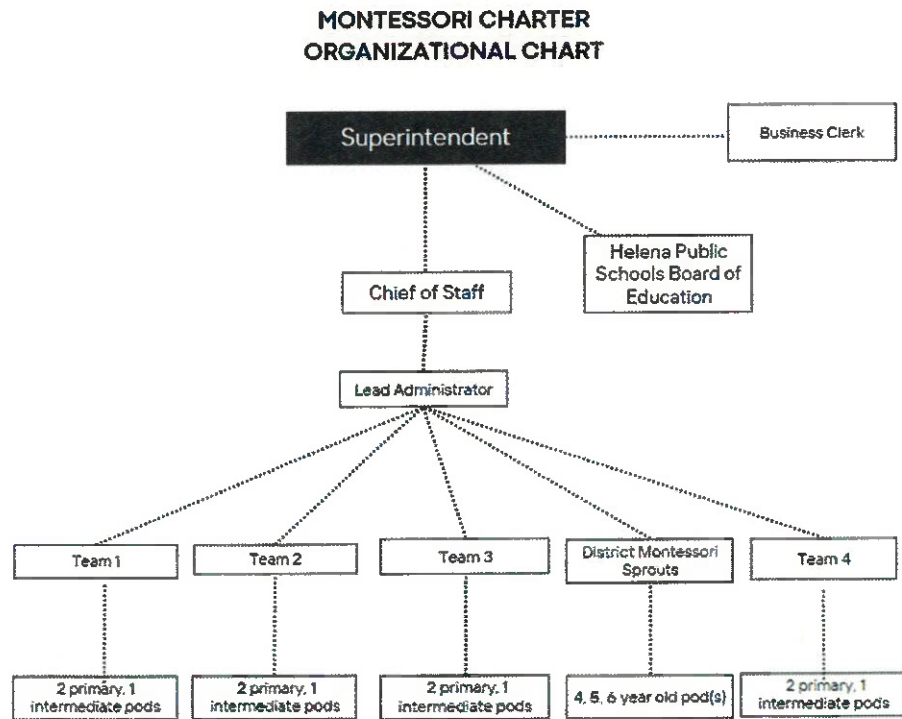
SCHOOL GOVERNANCE

We recognize that this section does not provide the space to fully and accurately respond to each of the questions below. Attachments and appendices are permitted. Please make sure to clearly state where corresponding responses are located.

- Describe the public charter school’s organizational chart that clearly presents the proposed organizational structure, including lines of authority and reporting between the governing board, staff, related bodies such as advisory bodies or parent and teacher councils, and external organizations that will play a role in managing the public charter school.

The HPSD Montessori Charter School will be governed by the Helena Public Schools Board of Trustees. The superintendent will report directly to the board of trustees. The business clerk will report directly to the superintendent. Also operating under the superintendent is the chief of staff, and under the assistant superintendent is the lead administrator for the Montessori Charter School. This person will oversee all day-to-day operations of all satellite sites.

Each classroom will have a certified licensed teacher. In the event a student has an IEP or 504, content will be modified to include any IEP and 504 requirements to ensure that students are making adequate progress. Each student will have an individualized learning plan based on their goals.



- Describe the roles and responsibilities of the governing board, the proposed leadership management team, and other entities shown in the organizational chart.

The Helena Public Schools Board of Trustees will be the governing body of the Montessori Charter School which includes responsibility for the conduct and governance as delegated by Montana state law.

The board has ultimate authority to set budgets, approve policy, and approve recommendations for hiring and termination of staff.

11. Provide a staffing chart for the public charter school’s first year and a staffing plan for the term of the public charter school.

POSITION	FTE Year 1-2	FTE Year 3-5
Primary Pod Teacher	6.0	8.0
Intermediate Pod Teacher	3.0	4.0
Montessori Sprouts Teacher	1.0	6.0
Total Anticipated FTE	10.0	18.0

12. Detail the public charter school startup plan, identifying tasks, timelines, and responsible individuals.

Montessori Charter School Start Up Plan

Charter School Proposal Application

Goal 1.0 Student Enrollment Goals		
GOAL 1.1: By March 2024, the Montessori Charter School will finalize registration information and FTE.		
Goal 1.2: By April 2024, the Montessori Charter School will open enrollment.		
Goal 1.3: In June 2024, student registration and placement will be finalized.		
Goal 1.4: In August 2024, student instruction will begin.		
Goal 1.5: By September 2024, a program expansion plan for years 2-5 will be established.		
Action Steps	Who	When
1. Review applications and offer student placements, establish waiting list	Lead administrator	April -August 2024
2. Work with community to survey for expansion	District office	August 2024
3. Determine sites for new Montessori Sprouts programs	Chief of staff	September 2024
4. Advertise program expansion	District communications specialist	October 2024
5. Enroll new students for 2024-2025	Lead administrator	April 2025
Goal 2.0 Staffing Goal		
GOAL 2.1: Determine current staffing needs.		
GOAL 2.2: Reallocate FTE to Montessori Sprouts program.		
Plan A: Action Steps	Who	When

1. Review all Montessori applications to determine staffing needs	Chief of staff	April 2024
2. Advertise teaching positions to meet the demand for new Montessori Sprouts classroom to open September 2024.	Human resources	June 2024

3.0 Governance Goals		
GOAL 3.1: HPSD Montessori Charter School will be approved by Montana Board of Public Instruction.		
GOAL 3.2: HPSD Board of Trustees will approve the Montessori Charter School.		
GOAL 3.3: HPSD Montessori Charter School's parent and student handbook will be finalized.		
Action Steps	Who	When
1. The Montana Board of Public Instruction will approve the Montessori Charter School.	State of Montana	January 2024
2. HPSD Board of Trustees will be asked to approve the Montessori Charter School.	Superintendent	January-February 2024
3. The parent and student handbooks will be created and submitted to the HPSD Board of Trustees for approval.	Chief of staff	July 2024

13. Describe the plans for recruiting and developing school leadership and staff.

The HPSD supports MACTE accreditation for teachers in Montessori classrooms but recognizes the challenges in obtaining this training including the costs of travel, lodging and coursework. NAMC certification will be accepted as well and will provide new Montessori teachers with the opportunity to work alongside local Montessori teachers in a teacher trainer/informal practicum model of instruction. This blended model will provide Montessori certification.

The Helena Public Montessori Parents, Inc. (HPMP) is a nonprofit 501(c)(3) organization comprised of parents and others supporting Montessori in Helena's public schools. Donations help provide the specialized Montessori teacher training and certification scholarships as well as Montessori materials for HPSD classrooms. HPMP also encourages and supports Montessori education in HPSD by promoting the understanding of Montessori methods and providing resources to satisfy the needs of the community for Montessori education. Please see the HPSD Montessori Charter professional development scholarship agreement example (Appendix 3).

14. Describe the proposed leadership and teacher employment policies, including performance evaluation plans.

Employees' job performance will be evaluated by each employee's direct supervisor. The evaluation process includes scheduled annual evaluations using forms applicable to the job classification and description and day-to-day appraisals.

For teachers, an evaluation rubric based on the Danielson Framework for Teaching is used to provide opportunity for open discussion on areas of strength and opportunities for growth based on actionable steps for improvement. All non-tenured teachers will be evaluated annually; tenured teachers will be

evaluated on a three-year cycle. The evaluation process for teachers will include a pre-evaluation meeting, two informal walkthroughs with feedback provided, formal observation with feedback provided, and a formal evaluation.

15. State the proposed governing bylaws.

The HPSD Montessori Charter School will be governed by the HPSD Board of Trustees policies and procedures which can be found at [Policies | Helena Public Schools \(helenaschools.org\)](https://www.helenaschools.org/policies).

16. Explain any partnerships or contractual relationships central to the operations and mission of the public charter school.

Helena Public Montessori Parents (HPMP) is a non-profit 501(c)(3) organization comprised of parents and others supporting Montessori in Helena's public schools. Donations to HPMP help provide specialized Montessori teacher training and certification scholarships as well as Montessori materials for HPSD classrooms.

17. Provide the proposed calendar and sample daily schedule.

HPSD Montessori Charter School students will follow the annual school calendar set forth by the HPSD Board of Trustees.

Sample Daily Schedule

Primary Classroom:

8:30 Welcome, Announcements

8:40-9:40 Music/PE

9:40-10:00 snack/read aloud

10:00-10:40 double recess (allows for uninterrupted work cycle)

10:40-11:00 i-Ready

11:00-11:35 WIN Groups

11:35-12:20 lunch/recess

12:20-2:45 Work Cycle

2:45 Clean up, jobs, presentations, class meeting

3:15 dismissal

Intermediate Classroom:

8:30 Welcome, Announcements

8:45-9:15 Essentials (Music, PE, Library)

9:15-11:30 Great Works Period

11:30-12:10 Morning Meeting (student led)

12:10-12:55 Lunch recess and eating

1:00-1:30 ELA focus using narrative, science, and social studies content

1:30-2:00 WIN ELA

2:00-2:10 Read Aloud/short grammar practice

2:10-2:40 Long Montessori Recess

2:40-3:15 Math facts and small group works, clean up, and end with Closing Ceremony

BUSINESS OPERATIONS

We recognize that this section does not provide the space to fully and accurately respond to each of the questions below. Attachments and appendices are permitted. Please make sure to clearly state where corresponding responses are located.

18. Describe plans for providing transportation, food service, and all other significant operational or ancillary services.

Students will have access to HPSD student transportation services provided there is a bus route established. There will not be east to west side bussing or west to east side bussing available.

All students will have access to on-site food service options. Meal prices, including free and reduced-price options, will apply.

19. Describe cocurricular and extracurricular programs and how the programs will be funded and delivered.

As set forth in Montana Code Annotated § 20-5-101: Nonpublic school students can participate in public school extracurriculars and enroll part time in their resident school district in Montana. If a homeschooler participates in public school extracurriculars, the school principal may review the homeschooler's curriculum to verify that a student meets academic eligibility.

20. Describe the proposed financial plan and policies, including financial controls and audit requirements.

The Helena Public School District complies with all financial and audit requirements which are outlined here:

<https://helenaschools.org/wp-content/uploads/2020/05/7012-Procurement-of-Supplies-Materials-Equipment-and-Services-Using-Federal-Funds-.pdf>

<https://helenaschools.org/wp-content/uploads/2020/05/7030-Accounting-and-Audits.pdf>

Printed versions are attached to the end of this application (Appendix 4).

21. Describe the insurance coverage that will be obtained.

Please see HPSD's current insurance policy, attached (Appendix 5).

22. Describe the startup and five-year budgets with clearly stated assumptions.

Please see a detailed budget attached to this application (Appendix 6).

23. Describe the startup and first year cash flow projections with clearly stated assumptions.

Startup and first year cash flow projections are stated in the proposed budget documents.

24. Describe anticipated fundraising contributions and evidence, if applicable.

Helena Public Montessori Parents, Inc. (HPMP) is a nonprofit 501(c)(3) organization comprised of parents and others supporting Montessori in Helena's public schools. Donations help provide the specialized Montessori teacher training and certification scholarships, as well as Montessori materials for Helena School District #1 classrooms. HPMP also promotes understanding of Montessori methods and provides resources to satisfy the needs of the community for Montessori education. Monetary donations are used to support teachers with larger classroom material purchases or other classroom needs. General donations also help with continuing Montessori education, training opportunities for existing Montessori teachers, and/or scholarships for new Montessori teacher certification and training.

25. Describe the facilities plan, including backup or contingency plans.

Each Montessori strand (2 early literacy Sprouts classes, 2 primary pods, 1 intermediate pod) will be located in current elementary schools. As we have dedicated space for these classes, no backup or contingency plans are necessary.

COMMUNITY SUPPORT AND NEED We recognize that this section does not provide the space to fully and accurately respond to each of the questions below. Attachments and appendices are permitted. Please make sure to clearly state where corresponding responses are located.

26. Describe the specific evidence of significant community support.

Each year there are more applications to the HPSD Montessori classrooms than spots available. Our community has communicated high interest in HPSD adding additional Montessori programming. We know, via our waiting list, that we have enough interest to grow Montessori programming. We would like to respond to our community by providing our families and students with this choice.

27. Describe the opportunities and expectations for parent involvement.

Parents of Montessori students are provided with many opportunities to become involved. Beyond volunteering at their child's Montessori classroom or home school, they have the opportunity to join HPMP which has many opportunities for parents to become involved to strengthen HPSD's Montessori programming.

Questions? Contact bpe@mt.gov

HPSD Montessori Charter School Application

Appendices

Appendix 1: Montessori Charter registration form example

Appendix 2: Montessori Charter Handbook example

Appendix 3: Montessori Charter professional development scholarship agreement example

Appendix 4: HPSPD financial plan and policies, including financial controls and audit requirements.

Appendix 5: HPSPD current insurance coverage.

Appendix 6: Montessori Charter School Budget



MONTESSORI PROGRAM
Lottery Registration Form

Please note:

- The lottery is for all 2022-2023 CURRENT Kindergarten students entering 1st grade for the 2023-24 school year.
- **If offered a spot, you must respond within 3 days to hold the placement!**

Child's Name: _____ Date: _____

Birthdate: _____ Sex: M F

Resident of Helena School District #1: Yes No

School Attended (Kindergarten): _____

Parent/Guardian: _____

Home Address: _____ Zip Code: _____

Telephone: Home: _____ Work: _____

Parent Email: _____

School Preference: _____ Broadwater _____ Central _____ Smith

(District staff determine school placement but welcome information on your preference.)

Siblings currently enrolled at: _____ School

Please deliver completed applications to:

Central Elementary School, 402 North Warren, Helena, MT 59601 or lgeorge@helenaschools.org

- **Lottery Registration Deadline is 3 pm on Wednesday, March 22 at Central School.**
- **Application may also be turned in at your home school any time prior to 9 am on Wednesday, March 22.**
- **Please make sure you receive a received receipt from the building secretary.**
- **Do not turn in application to teachers; they will not accept them.**

Thirty-six students will be selected via computer lottery on Monday, April 3. You will be contacted by phone if your child is selected. If your child is given a number beyond 36, you will be contacted via email with your child's number. Decision to accept or decline must be done within 3 days.

*Helena Public Schools
Helena, Montana*

*Montessori Program
Handbook
2018-2019*

History of Montessori Program Helena Public Schools

The development of a Montessori Program in School District #1 began in the fall of 1990. It has grown since that time to include three locations. Each location offers two lower elementary and one upper elementary classroom. This configuration provides the opportunity for students to be enrolled throughout their elementary education in grades 1-5.

1988-1990	Helena parents/community advocate for Montessori education
May, 1990	The Helena Board of Trustees accept proposal
1990-1991	First lower elementary class (grades 1-3, ages 6-9) implemented - Central
1991-1992	Second lower elementary class (grades 1-3, ages 6-9) implemented - Central
1993-1994	Third class (upper elementary, grades 4-5, ages 9-12) implemented - Central
1994-1995	Fourth lower elementary class (grades 1-3, ages 6-9) implemented - Lincoln, Jefferson, Smith
1996-1997	Fifth class (upper elementary, grades 4-5, ages 9-12) implemented - Central, Smith
1998 -1999	Lower elementary class identified and elementary Montessori continuum available at Central and Smith Schools for students in grades 1-5 (6 classrooms)
2005-2006	Lower elementary class (grades 1-3, ages 6-9) implemented at Broadwater School
2008-2009	Second lower elementary class (grades 1+3, ages 6-9) implemented at Broadwater School
2009-2010	Upper elementary class (grades 4-5, ages 9-12) added at Broadwater School

Behavior Plan

Students in the Montessori classroom are accountable to the same school-wide rules as students in other classrooms.

Tuition

HPS Montessori is a public education offering; there is no tuition charge.

Transportation

A student is eligible for district-provided transportation if she/he attends a Montessori Elementary Program and lives beyond the K - 8 walk zone. Montessori transportation boundaries are divided into an east and west boundary. West side Montessori program (Broadwater) students are eligible for transportation to the west side Montessori program if they are from the following schools; Kessler, Hawthorne, Broadwater, Four Georgians, Jim Darcy, Rossiter. East side Montessori program (Smith, Central) students are eligible for transportation to the east side Montessori program if they are from the following schools; Jefferson, Central, Bryant, Smith, Warren. **Families that cross over Montessori boundaries, become parent choice and are not eligible for transportation services.**

Transportation is not provided for the Montessori Preschool at Hawthorne.

Progress Reports

Parent-teacher conferences are scheduled twice yearly in each elementary school. Montessori classrooms participate in the same conference dates. Additional conferences may be arranged as the need arises.

The lower Montessori classrooms use a common report card. The upper Montessori classrooms use the report card that their school uses.

Students in Montessori classrooms will participate in all district assessment and standardized testing.



Helena Public Montessori Parents HPMP

HPMP is a non-profit parent group that is devoted to Montessori education and support of the teachers and students. HPMP supports Montessori education in many ways, by volunteering in the classroom and working to raise funds for teacher training, continued professional development and classroom materials.

Meetings are held on the first Monday of every school month at 5:30 p.m. Parents are encouraged to attend these meetings but attendance is not required.

HPMP's mission is to encourage and support Montessori education in the Helena Public Schools through the funding of classroom materials; to promote the understanding of Montessori methods; and to provide resources to satisfy the needs of the community for Montessori education.

Helena Public Montessori Parents, Inc. (HPMP) www.helenamontessori.org
PO Box 731, Helena, MT 59624

2015-2016 HPMP Officers:

Co-President, Tiffany Lyden (Smith parent) 261-6977	tiffanylyden@gmail.com
Co-President, Piper Lynch (Broadwater parent) 459-9726	piperlynch@hotmail.com
Treasurer, Alan Woodmansey (Smith parent) 431-5856	awoodmansey@yahoo.com
Secretary, Megan Field (Broadwater parent) 461-1374	field406@gmail.com
Smith Rep, Megan Skolrud (406) 794-2279	mokolrud@hotmail.com
Broadwater Rep, Therese Simpson 465-5011	tesssimp@gmail.com
Central Rep, Sonja and Pete Nowakowski 781-5131	sonjanowakowski@hotmail.com petenowakowski@gmail.com

The Montessori Method



The Montessori Method is a child-centered approach to education that allows each child to follow an individualized learning program at their own pace.

The classroom environment is carefully prepared to facilitate self-directed learning. The teacher or director observes the child and acts as a guide. Lessons are presented individually or to small groups as needed.

This approach enables each child to develop intellectually, socially, emotionally, and physically at their own unique pace. The child learns to take responsibility for his/her own actions and studies.

Montessori materials are provided to awaken the child's interest, which is then fostered by the teacher. Children are introduced to new concepts through specially designed, hands-on materials they can manipulate. Thus, they learn through their own experience and discovery.

Beginning from preschool, Montessori classrooms are organized in three-year age groupings. This enables students to work at their own speed and ability level in all subjects, and encourages older students to help younger, and vice versa.

The prepared Montessori environment stimulates the child's natural love of learning and innate curiosity. It provides children the opportunity to develop learning skills and a lifelong love of learning.



Classroom Organizational Patterns

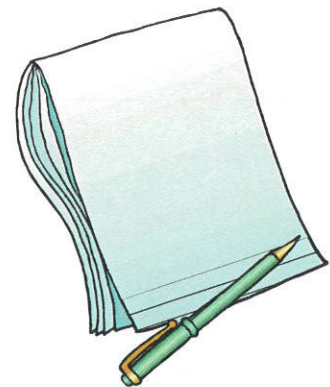
The organization of a Montessori classroom requires flexibility. Furniture used in the classroom allows for individual and group work at tables and chairs rather than desks. A large open floor space allows children to work on the floor. A full range of Montessori materials is necessary for the elementary class, plus whatever additional materials are needed depending upon the levels of the students.

The Montessori environment should be arranged so that the greatest possible independence may be enjoyed by the child. Rather than directing the child's development, the teacher must know the level of achievement and the interests of each child and must thoroughly know the entire curriculum and state aligned standards. With this knowledge, the teacher is able to match materials to the child when the child needs help in making the match.

Description of Montessori Methodology in Helena Public Schools

The Montessori methodology has been found to be compatible with School District #1 curriculums for all applicable grades and subjects. It is in compliance with Montana Curriculum standards.

Program goals are specific to the curriculum as they are presented to the Montessori-trained teachers by American Montessori Society (AMS), American Montessori Institute (AMI), and Pan American Montessori (PanAM) training centers. These goals are reflected in the numerous materials prepared by teachers with parental assistance.





Montessori Professional Development Scholarship Agreement

This Montessori Professional Development Scholarship Agreement ("the Agreement") is entered into between Helena Public Montessori Parents, Inc. ("HPMP") and _____ (hereinafter "the Trainee"). The purpose of this Agreement is for HPMP to provide funding to the Trainee to assist the Trainee to attend Montessori professional development course(s), subject to the terms and conditions set forth below.

A. Mutual Understandings of HPMP and Trainee

HPMP and Trainee mutually understand the following:

1. Tuition: HPMP will pay for Elementary I training, Elementary II training, or HPMP-approved Montessori professional development courses, subject to available funding. These funds shall be expended only for tuition, materials, and certification fees. HPMP will pay tuition or registration costs directly to the training institution. Trainee is awarded: _____ **[insert scholarship amount]**.
2. Training-related expenses: Based upon available funds, HPMP also will consider paying for training-related expenses, including transportation, food, and lodging. Funding for training-related expenses will be determined by the HPMP Board on a case-by-case basis. Trainee must submit a proposal to the HPMP Board for training expenses, and such expenses, if approved, will be paid to the Trainee in advance of training.

Trainee is awarded: _____ **[insert any additional amount]**.

3. Professional Development time limits: All HPMP-funded training must be completed within three (3) years for Elementary I training and within five (5) years for Elementary II training.
4. Other limitations: HPMP will only pay for a specific course or training for Trainee one time. It is Trainee's responsibility to ensure that the training meets all requirements for certification and/or professional development.

B. HPMP's Duties and Responsibilities

Based on the foregoing, and HPMP's understanding that the Trainee is currently employed with the Helena School District No. 1, HPMP agrees to the following:

employment, the principal amount of one-third of the total amount of tuition and expenses paid by HPMP will be forgiven.

- 6. In the event that Trainee resigns or is terminated by the School District (unless such termination is not for good cause) within three years after Trainee's successful completion of Montessori certification, eligibility for training shall end immediately and the Trainee shall repay to HPMP the entire amount of the unforgiven tuition and expenses paid by HPMP on behalf of the Trainee, plus interest at the rate of 1.5% per month, within ninety (90) days of such resignation or termination, as the case may be.
- 7. If there is an early termination, certification failure, employment resignation or employment termination, under this Agreement, and if the Trainee does not repay HPMP as set forth in this Agreement, the Trainee shall be considered in default of this Agreement, and the Trainee shall be subject to lawsuit or other legal action by HPMP for breach of contract, or other cause(s) of action, in connection with a substantial breach, or breaches, of a material condition, or conditions, of this Agreement.

D. Miscellaneous

- 1. HPMP and the Trainee mutually agree that each of the duties and responsibilities set forth above for each of them, respectively, are material conditions.
- 2. HPMP and the Trainee mutually agree that the laws of the State of Montana shall govern the interpretation of and the resolution of any disputes arising from this Agreement.
- 3. This Agreement shall be effective and binding on each of them upon receipt by HPMP of the fully executed original hereof.

Agreed to:

Agreed to:

 Elizabeth Maxiner
 Co-Chair, HPMP Board
 Date: _____

 Name: _____
 Trainee
 Date: _____

Helena School District No.1 - Accounts Payable

This document contains a listing of control activities (generically described in the dark green shaded rows). We would like for you to elaborate on how your organization has implemented these control activities in the rows labeled as "Data Gathering" (shaded in lighter green). If the control activity is not applicable please note why it is not. For activities where the Data Gathering information is already completed please update the information as needed. Please indicate that you have changed the information by adding "***CHANGED***" at the beginning of the Data Gathering commentary – Thank you!

ID	Description
A.DD.01	<p>ACCOUNTS PAYABLE ACTIVITIES</p> <p>The appropriate level of management or another appropriate person periodically compares actual expenditures to budgeted expenditures and follows up on significant variances.</p>
Data Gathering:	<p>Budget reports are reviewed during the budget and finance committee meetings. The chairperson of the committee provides a report to the full board at the monthly board of trustee meetings.</p>
A.DD.02	<p>Purchasing is separated from requisitioning, shipping, receiving, and inventory recording functions, and access to the vendor master file is restricted to authorized personnel.</p>
Data Gathering:	<p>**CHANGED**A purchase order requisition is prepared by the school or department which is placing the order. The school must include the vendor name, address, phone #, as well as a detailed description of each item with the quantities and unit price. The school must also specify the accounts which are to be expensed. The order is typed into a computer at the school and forwarded to the business office after it is approved by the school principal or department head. [Purchase order requisitions are signed by the school principal or department head]. Note that the signing is now done electronically on the AP system. The numbers are assigned by the accounting system after they are reviewed and authorized.</p> <p>Janelle, Business Services Administrator, signs each requisition for authorization, to verify the account code and to make sure the type of purchase is permitted by state law or board policy. Janelle obtains verbal approval from the Superintendent for purchases over \$10,000. If Janelle is gone, Michelle, Accountant, will approve requisitions under \$5,000 or the staff will wait to obtain Janelle's approval. [Purchase requisition forms are reviewed and approved by the appropriate accounting personnel].</p> <p>The requisition is approved on the computer system and is available in four copies (Vendor, File, Receiving and Entity) and is then called a purchase order. One copy is emailed to the vendor; the receiving copy is emailed to the warehouse, Technology office or the school librarian; the AP clerk accesses the approved PO electronically through the accounting software. An email confirming the purchase order is sent to the originator. The purchase orders specify that items should be mailed to the district warehouse</p> <p>When the warehouse receives the delivery, Virginia (warehouse supervisor) accesses the PO information on the computer and records what is received. Live specimens (science experiments) go directly to the individual who ordered them. Since there is no IMC, the librarians are able to receive books directly and then they contact Virginia who marks the order received and continues on the process. [Deliveries are verified when received and agreed to the related PO]. Amazon and PCard orders are delivered to purchaser who reviews receipt of merchandise and attaches "delivered on" confirmations electronically to the purchase order.</p>
A.DD.04	<p>Invoice processing and accounts payable are segregated from the general ledger function.</p>

Helena School District No.1 - Accounts Payable

Data Gathering: ****CHANGED****Daily, the invoices are filed with the A/P purchase order files. Delicia and/or Tammy review the PO to confirm both a received notation from Virginia and an invoice are attached. They compare the two to the electronic purchase order online and marks it to be included in a batch to be paid. They compare pricing, quantity and resolve any variances. [The PO and purchase invoice terms (quantity and pricing) are agreed to the electronic purchase order online and variances are investigated and resolved]. The accounts payable are recorded at year end by reviewing open items on the PO system and listing them by fund/function/line item. These items then get booked as an encumbrance and are rolled into the new year.

A.DD.11 Purchases are reviewed for compliance with requirements of laws and regulations, the governing body and of funding sources, if applicable (for example, competitive bidding requirements).

Data Gathering: ****CHANGED****A purchase order requisition is prepared by the school or department which is placing the order. The school must include the vendor name, address, phone #, as well as a detailed description of each item with the quantities and unit price. The school must also specify the accounts which are to be expensed. The order is typed into a computer at the school and forwarded to the business office after it is approved by the school principal or department head. [Purchase order requisitions are signed by the school principal or department head]. Note that the signing is now done electronically on the AP system. The numbers are assigned by the accounting system after Janelle reviews and authorizes.

A.DD.14 Receiving reports are matched with goods actually received, are signed by the person who examined the shipment, and are promptly provided to personnel in accounts payable processing and recordkeeping.

Data Gathering: ****CHANGED****When the warehouse receives the delivery, Virginia (warehouse supervisor) accesses the PO information on the computer and records what is received. Live specimens (science experiments) go directly to the individual who ordered them. Since there is no IMC, the librarians are able to receive books directly and then they contact Virginia who marks the order received and continues on the process. [Deliveries are verified when received and agreed to the related PO]. Amazon and PCard orders are delivered to purchaser who reviews receipt of merchandise and attaches "delivered on" confirmations electronically to the purchase order.

If something received is damaged, it is either noticed at the warehouse by Virginia Thom or else at the school. If it is noticed at the warehouse, Virginia will send it back with the shipper at that point and simply note it as not received on the purchase order and the vendor will send another. If it is noticed at the school, it is returned from there and another one is sent to replace it.

Recording Accounts Payable
Daily, the invoices are electronically attached to the A/P purchase order files. Delicia and/or Tammy review the PO to confirm both a received notation from Virginia and an invoice are attached. They compare the two to the electronic purchase order online and marks it to be included in a batch to be paid. They compare pricing, quantity and resolve any variances. [The PO and purchase invoice terms (quantity and pricing) are agreed to the electronic purchase order online and variances are investigated and resolved]. The accounts payable are recorded at year end by reviewing open items on the PO system and listing them by fund/function/line item. These items then get booked as an encumbrance and are rolled into the new year.

A.DD.15 Purchase orders are reviewed to ensure the expenditure is within budget or other restrictions.

Helena School District No.1 - Accounts Payable

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<p>Data Gathering:</p>	<p>Budget is reviewed by Janelle Mickelson and the board of trustees.</p>
<p>A.DD.16</p> <p>Data Gathering:</p>	<p>Purchases are recorded properly as to account, amount, and period. Account distributions are recorded by the operating department and reviewed by the accounting department.</p> <p>**CHANGED**Daily, the invoices are electronically attached to the A/P purchase order files. Delicia and/or Tammy review the PO to confirm both a received notation from Virginia and an invoice are attached. They compare the two to the electronic purchase order online and mark it to be included in a batch to be paid. They compare pricing, quantity and resolves any variances. [The PO and purchase invoice terms (quantity and pricing) are agreed to the electronic purchase order online and variances are investigated and resolved]. The accounts payable are recorded at year end by reviewing open items on the PO system and listing them by fund/function/line item. These items then get booked as an encumbrance and are rolled into the new year.</p>
<p>A.DD.17</p> <p>Data Gathering:</p>	<p>The accounts payable trial balance is compared with individual open invoice totals and reconciled to the general ledger control account.</p> <p>**CHANGED**Delicia and Tammy process purchase order payments. Tammy processes payments that are paid directly without a purchase order having been issued. Both use a batch system in the software for processing payment. The system requires the invoice number to be entered and prevents duplicate invoices from being paid. [The A/P system requires an invoice number to be entered and prevents duplicate payments]. If the payment is from a PO, then that number is entered. If the payment is a "direct pay", the Schools prepare the direct pay form, which is the same as a PO form only the check box for direct pay is selected. The direct pay form is entered by the School and includes the invoice number, the account code and description provided by each school/department. Delicia, Tammy and Janelle will review all the paperwork for purchase orders and direct pays to verify they have management's approval and Janelle's approval. [To process payment, the Accounting Clerk reviews paperwork for proper approval]. She checks the accuracy of the invoices, subtotals and other necessary information. Michelle's login ID's to the computer are the only ones set up to run checks. When the checks are run, the items are expensed to the proper expense accounts.</p>
<p>A.DD.22</p> <p>Data Gathering:</p>	<p>SELF FUNDED INSURANCE</p> <p>Adequate insurance files are maintained for workers' compensation claims, general liability claims, and physical damage claims. They are physically controlled to prevent their loss or use by unauthorized personnel.</p> <p>Claims are handled by Alligant and files are maintained in the HR Benefit Specialists office.</p>

Helena School District No.1 - Control Activities - Entity Level (Required)

This document contains a listing of control activities (generically described in the dark green shaded rows). We would like for you to elaborate on how your organization has implemented these control activities in the rows labeled as "Data Gathering" (shaded in lighter green). If the control activity is not applicable please note why it is not. For activities where the Data Gathering information is already completed please update the information as needed. Please indicate that you have changed the information by adding "***CHANGED**" at the beginning of the Data Gathering commentary - Thank you!

ID	Description
A.EL.01	<p>Control Environment: Those in charge of governance possess the required skills to and regularly evaluate management and their effectiveness of promoting a sound control environment.</p> <p>Data Gathering: The board consists of various individuals from the community with all different backgrounds. They all understand the importance of a strong control structure and the need to adapt to the ever-changing work environment. They also have the pulse of the community and understand where risks may exist.</p>
A.EL.02	<p>Control Environment: Management has created and maintained a culture of honest and ethical behavior by providing a foundation for the other components of internal control.</p> <p>Data Gathering: ***CHANGED** Management has established a very strong tone at the top. The management leads by example. The district also employs Kaleva Law and its policy revisions at the first chance. Employees are required to sign off on policy and procedures manuals as well as a code of conduct to start employment with the district.</p>
A.EL.04	<p>Risk Assessment: If the entity has an informal or ad hoc risk assessment process, has it identified and addressed how applicable business risks impact financial reporting objectives.</p> <p>Data Gathering: The board of trustees reviews financial performance as well as operational structure on a regular basis. Changes are made to operational policies on a regular basis based on changes to operations, staffing levels, and new risks that have been identified.</p>
A.EL.05	<p>Control Activities: Management designs and implements controls that address identified risks related to financial reporting and/or misappropriation of assets.</p> <p>Data Gathering: ***CHANGED** Client has a strong safeguard in place when it comes to financial reporting with good separation of duties. There are clerks in place over payroll and purchasing with Business Manager, Payroll Director and Assistant Clerk overseeing and reviewing items. Management is very active in the approval and review process of day-to-day operations. Management has different levels of responsibility assigned based on job description and access to records and financial data is restricted.</p>
A.EL.08	<p>Information and Communication Systems: There are procedures and related accounting records to support the initiation, authorization, recording, and processing of transactions as reported in the financial statements.</p> <p>Data Gathering: See RBA 450s for documenting of procedures related to initiation, authorization, recording, and processing of transactions. All significant classes of transactions have controls in place that are functioning properly.</p>

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Helena School District No.1 - Control Activities - Entity Level (Required)

A.EL.11 Monitoring of Controls: Management is involved in the entity's operations to identify significant variances and any issues identified related to the effectiveness of internal controls.

Data Gathering: ****CHANGED****Business Manager and Assistant Clerk review operations on a day to day basis to ensure all secretaries and clerks are properly recording things. They also review closely in an attempt to watch for variances in fund activities and address any items of concern. If items arise, there is an in depth look in the processes in place to ensure controls are functioning properly and to make any changes necessary to remedy problems.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
10/27/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Helena Office Marsh McLennan Agency LLC P.O. Box 6127 Helena, MT 59604	CONTACT NAME: PHONE (A/C, No, Ext): (406) 442-5360 E-MAIL ADDRESS:	FAX (A/C, No):
	INSURER(S) AFFORDING COVERAGE	
INSURED Helena Public Schools 1325 Poplar Street Helena, MT 59601	INSURER A : Lloyd's Syndicate 2987 (Brit Syndicates Limited)	
	INSURER B : Montana State Fund	
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			PK1036823	7/1/2023	7/1/2024	EACH OCCURRENCE	\$ 3,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$
							MED EXP (Any one person)	\$ 5,000
							PERSONAL & ADV INJURY	\$ 3,000,000
							GENERAL AGGREGATE	\$ 5,000,000
							PRODUCTS - COMP/OP AGG	\$ 3,000,000
								\$
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			PK1036823	7/1/2023	7/1/2024	COMBINED SINGLE LIMIT (Ea accident)	\$ 3,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N <input checked="" type="checkbox"/> N / A If yes, describe under DESCRIPTION OF OPERATIONS below			034518563	7/1/2023	7/1/2024	PER STATUTE OTH-ER	\$ 1,000,000
							E.L. EACH ACCIDENT	\$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	\$ 1,000,000
A	Errors & Omissions			PK1036823	7/1/2023	7/1/2024	EACH OCCURRENCE	3,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
See attached ENDORSEMENT - MONTANA TORT IMMUNITY for restrictions to applicable limits

For Informational Purposes Only

CERTIFICATE HOLDER INFORMATIONAL	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE <i>Kelsey Longeneur</i>

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

NAMED INSURED: Montana Schools Property & Liability Insurance Plan

Policy Number: PK1036822

Effective Date: July 1, 2022

Endorsement No. 7

**MONTANA TORT IMMUNITY
(Manuscript)**

Notwithstanding anything to the contrary in this Policy, including any endorsements, this Policy does not apply to any amount for which the **INSURED** would not be liable under applicable governmental or sovereign immunity but for the existence of this Policy. It is understood and agreed that the **INSURED** shall not waive, either in the adjustment of claims or in the defense of **SUITS** against the **INSURED**, any governmental or sovereign immunity, of the **INSURED**, unless Underwriters and the **INSURED** mutually agree, in writing in advance, to do so.

The following is added to **Coverage Section II General Liability – Excess Limits of Insurance** and **Coverage Section III AUTOMOBILE Liability – Excess Limits of Insurance** respectively:

In accordance with tort limitations that have been enacted on governmental liability for damages in tort under the substantive law of Montana (Montana Code Annotated 2014, 2-9-108) pursuant to a waiver of sovereign immunity solely because of the existence of this Policy, including any endorsements, the following applies:

- (a) The following **Specific Excess Limits of Insurance** per **OCCURRENCE** for this Coverage Section applies only to **ULTIMATE NET LOSS** excluding **DEFENSE COSTS**:

\$750,000 for each claim subject to \$1,500,000 for each **OCCURRENCE**.
- (b) These limits are part of and not in addition to, the **Specific Excess Limit of Insurance** per **OCCURRENCE** and Annual Aggregate limit as stated in the applicable Coverage Section of **Schedule of Specific Excess Limits of Insurance**.
- (c) The above stated each claim limit is the most Underwriters will indemnify the **INSURED** under this Coverage Section for each claim. The above stated each **OCCURRENCE** limit is the most Underwriters will indemnify all **INSUREDS** collectively under this Coverage Section for all covered claims arising out of a single **OCCURRENCE**.
- (d) Any **DEFENSE COSTS** payable under this Coverage Section will be in addition to the above stated limits, but in no event shall the total **ULTIMATE NET LOSS** including such **DEFENSE COSTS** per **OCCURRENCE** exceed the **Specific Excess Limit of Insurance** as stated in the **Schedule of Specific Excess Limits of Insurance** for the applicable Coverage Section.
- (e) The limits specified in Paragraph (a) above are inclusive of, and not in excess of, the applicable **SELF INSURED RETENTION**, as stated in the **Schedule of SELF INSURED RETENTIONS**. These limits are also inclusive of any Clash Coverage payments made by Underwriters as stated in **Clash Coverage**.
- (f) In the event the above described substantive law of Montana requires a change in the tort limits for entities subject to sovereign immunity, the limits specified in Paragraph (a) above will be amended to reflect the new limits, but in no event will such new amounts exceed the **Specific Excess Limit of Insurance** as stated in the **Schedule of Specific Excess Limits of Insurance** for the applicable Coverage Section.

Except as amended in this Endorsement, this insurance is subject to all coverage terms, clauses and conditions in the policy to which this Endorsement is attached.

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Helena Public Schools
Charter School Budget
Montessori Charter School

Helena Public Schools Charter School Budget: Initial Assumptions and Projection Montessori Charter School Application				
Overall Description Details				
Description	Assumptions	Amount	Number	Total
General	Assume a \$1,211,013 annual budget (figures have been rounded)			
Number of Students	A total of at least 180 students in grades 1 to 5. The charter will expand and contract to respond to increases and decreases in student enrollment.	180	180	180
High School	0	0	0	0
Middle School	0	0	0	0
Elementary School	At least 180 students in 1st to 5th grade on the initial year	180	180	180
Facility Square Footage	Multi-use space will be utilized for student in-person experiences and support. Staff spaces are available for teachers and other staff. HSD spaces are already available for these purposes.	N/A	0	0
Student Teacher Ratio	Class size will adhere to accreditation rules of Montana.	1	20	
Average Teacher Salary	Average teacher salaries in HSD are near \$51,500	\$51,500.00		

Revenues				
Description	Assumptions	Amount	Number	Total
Elementary School Basic entitlement \$57,246	We project we will meet the minimum enrollment of the 71 elementary students for the basic entitlement			
High School Basic entitlement	\$343,843.00	\$0.00	0	\$0.00
Middle School Basic entitlement	\$114,493.00	\$0.00	0	\$0.00
Elementary School Basic entitlement	\$57,246.00	\$57,246.00	1	\$57,246.00
State ANB formula for High School	per high school ANB	\$0.00	0	\$0.00
State ANB formula for Middle School	per middle school ANB	\$0.00	0	\$0.00
State ANB formula for Elementary	per elementary ANB	\$5,962.00	180	\$1,073,160.00
Quality Educator Payment	per certified Staff	\$3,673.00	9	\$33,057.00
Data for Achievement	per ANB	\$23.58	180	\$4,244.40
At Risk Payment	per student count	\$28.88	180	\$5,198.40
Indian Education for All	per ANB	\$24.63	180	\$4,433.40
American Indian Achievement Gap	per Native American student, we don't know at this time	\$242.00	0	\$0.00
Applicable State Grants	equitable share of appropriate grants	\$0.00	180	\$0.00
Applicable Federal Grants	equitable share of appropriate grants	\$0.00	180	\$0.00
Local Tax Revenue	local taxes will be used according to equitable share of local levies	30%	180	\$0.00
Grants and Fundraising	Parent Fundraising/grants donation	\$40,000.00	1	\$40,000.00
	TOTAL REVENUE			\$1,217,339.20

Expenditures				
Description	Assumptions	Amount	Number	Total
Personnel				
School Administrator	prorated per student enrollment	\$109,000.00	0.5	\$54,500.00
Counselor	prorated per student enrollment	\$51,500.00	0.5	\$25,750.00
Library	prorated per student enrollment	\$51,500.00	0.5	\$25,750.00
Teachers	prorated per student enrollment	\$51,500.00	9	\$463,500.00
Para Professionals	1 per location	\$21,650.00	3	\$64,950.00
Clerical	prorated per student enrollment	\$33,650.00	0.25	\$8,412.50

Helena Public Schools
Charter School Budget
Montessori Charter School

Nurse	prorated per student enrollment	\$51,500.00	0.25	\$12,875.00
Custodial	prorated per student enrollment	\$34,600.00	1	\$34,600.00
Fringe Benefits (leave etc.)	20% additional to employee salary	\$138,067.50	20%	\$138,067.50
Insurance Benefits	\$10,000 per employee	\$150,000.00	\$10,000 per	\$150,000.00
	TOTAL PERSONNEL		15	\$978,405.00

Instruction				
Description	Assumptions	Amount	Number	Total
Textbooks	\$250 per student	\$250.00	180	\$45,000
Curriculum	\$25 per student	\$25.00	180	\$4,500.00
Classroom Supplies	\$150 per student	\$150.00	180	\$27,000.00
Computers/ tech devices	\$200 per student	\$200.00	180	\$36,000.00
Shipping Costs	0	\$0.00	180	\$0.00
Software	\$100 per student	\$100.00	180	\$18,000.00
Field Trips	none budgeted at this time	\$0.00	0	\$0.00
Instructional Equipment	Staff Laptop/tech devices \$500 each	\$500.00	9	\$4,500.00
Library and Media	included above	\$0.00	0	\$0.00
Hotspots, Internet Connections	\$80.00 per student	\$0.00	180	\$0.00
Classroom Equipment	\$14,000 per location	\$14,000.00	3	\$42,000.00
	TOTAL INSTRUCTION			\$177,000.00

Supplies and Services				
Description	Assumptions	Amount	Number	Total
Office Supplies	\$300 per FTE	\$300.00	15	\$4,500.00
Furniture	none needed	\$0.00	0	\$0.00
Bookkeeping, Audit, Payroll Services	see indirect costs below			\$0.00
Banking	see indirect costs below			\$0.00
Legal	see indirect costs below			\$0.00
Liability and Property Insurance	see indirect costs below			\$0.00
Staff Professional Development	\$1000 per staff	\$1,000.00	15	\$15,000.00
Travel for Staff Site to Site	\$216 per staff	\$216.00	15	\$3,240.00
Internet	see indirect costs below			\$0.00
Food Service	see indirect costs below			\$0.00
Transportation	see indirect costs below			\$0.00
Health Supplies	see indirect costs below			\$0.00
Pest Control	see indirect costs below			\$0.00
Janitorial Supplies	see indirect costs below			\$0.00
Waste Disposal	see indirect costs below			\$0.00
Indirect Costs	revenue amount times the 2.7%	\$1,217,339.20	2.70%	\$32,868.16
	TOTAL SUPPLIES AND SERVICES			\$55,608.16

Facilities				
Description	Assumptions	Amount	Number	Total
Rent/Lease/Mortgage	HSD will not need to budget for facilities	N/A		
Maintenance and Repair	HSD will not need to budget for facilities	N/A		
Gas/Electric	HSD will not need to budget for facilities	N/A		
Phone	HSD will not need to budget for facilities	N/A		
Fire and Security	HSD will not need to budget for facilities	N/A		
	TOTAL FACILITIES			\$0.00

Final Financial Summary				
Description	Assumptions	Amount	Number	Total
Total Revenue				\$1,217,339.20
Total Expenditures				\$1,211,013.16
Surplus (Deficit)				\$6,326.04