

**Montana Board of
Public Education**

**Helena Public School District
Mount Ascension
Public Charter School Application**

September 2023

TABLE OF CONTENTS

INTRODUCTION	3
SUBMISSION PROCEDURES	3
PUBLIC CHARTER APPLICATION COVER PAGE	4
PUBLIC CHARTER APPLICATION	5
ACADEMIC PROGRAM	6
SCHOOL GOVERNANCE.....	11
BUSINESS OPERATIONS.....	17
COMMUNITY SUPPORT AND NEED	19
Appendices	20

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@Mountgov 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

Name of Public Charter School: Mount Ascension Learning Academy

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 Hathhorn
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: _____ Mount Ascension Learning Academy _____

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

Mount Ascension Learning Academy Charter School will provide academic instruction through fully virtual or blended models of instruction and will be available to all students in the state of Montana in grades 1-12. Mount Ascension Learning Academy will operate at five sites located at Helena High School, Capital High School, C.R. Anderson Middle School, Helena Middle School, and Explore School. 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.

Mount Ascension Learning Academy will provide personalized learning experiences in which staff, students, and community members work in collaboration to create a rich, engaging learning environment, build vital community partnerships, and support students in an intellectually diverse, active learning community. Students will have an opportunity to learn asynchronously or synchronously through a hybrid approach of online learning and on-campus courses depending on their choice. Each student will be supported by an education advocate who will work with the family throughout the student's school experience. This professional will ensure families and students are supported throughout their school journey, offering ongoing individualized academic planning, family support, and continuity of services.

Mount Ascension Learning Academy will engage students in a collaborative learning environment with staff and community members to provide 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 re-engage with Helena-area students and their families who have withdrawn from our district and also to connect with students across the state who wish to enroll in our virtual or blended options. We believe that Mount Ascension Learning Academy will provide choice for families and personalized educational experiences for students and ensure our community continues to have a public-school experience defined by excellence.

Opening Date: August 2024 _____ Public Charter Term Length: 9 months _____

Grades to be served: 1 -12 _____

Minimum Enrollment Per Year: 120 _____

Planned Enrollment Per Year: 350 _____

Maximum Enrollment Per Year: 500 _____

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		9	10	11	11	9	14	17	11	10	10	10	11	133
Year 2		10	10	12	12	12	15	15	15	30	30	30	30	221
Year 3		12	12	15	15	15	20	15	20	30	35	40	40	269
Year 4		15	15	18	18	18	20	20	25	30	40	50	50	319
Year 5		20	20	22	24	28	30	30	40	50	75	75	75	489

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.

Mount Ascension Learning Academy will be an online and hybrid school option that will serve students in grades 1-12. Students in grades 1-5 who are homeschooled will have the opportunity to enroll in Explore School, a collaboration with Helena Public Schools and Exploration Works Science Center. Students in grades 6-8 can attend Explore School and also can enroll in online and/or in-person courses through Mount Ascension that best fit their needs. Students in grades 9-12 can also be enrolled in online and/or in-person courses. Mount Ascension will expand educational opportunities for families and students who would be better served with a flexible learning opportunity. These include:

- Online asynchronous proficiency-based learning programs allowing students to work at their own pace with an on-demand tutor or site-based learning advocate.
- Students who are not able to attend in person due to acute mental health or medical crises, family responsibilities, etc.
- Students who prefer working at their own pace and on their own schedule.
- Students who have struggled with a traditional learning path.
- Students who want access to career and technical education courses, dual enrollment courses, or certificate programs.
- Students looking for early graduation through a proficiency-based model.
- Students who are credit deficient and in need of an accelerated credit recovery program.

Mission Statement: The Mount Ascension Learning Academy mission is to provide a transformative and personalized education experience that empowers students to thrive academically, socially, and personally. We are committed to fostering a supportive and inclusive learning community which promotes each student reaching their academic potential by mastering the skills and knowledge to support future aspirations to become responsible global citizens.

Vision Statement: Our vision is to be a pioneering force in education, recognized for innovation, excellence, and adaptability. At Mount Ascension Learning Academy, we envision a future in which students, regardless of their location or individual circumstances, have access to a high-quality education that is tailored to their unique needs and aspirations. We aim to cultivate a culture of lifelong learning and critical thinking, equipping our graduates with the skills and values needed to lead in a rapidly evolving world.

Mount Ascension will ensure that students in Helena Public Schools and students around the state have access to academic programming that meets the critical needs of all students and families who wish to have a more personalized educational experience than our traditional school settings are able to provide. Our goal is to offer every participating family a choice in customizing a school experience for their student to ensure our community's children obtain a high-quality public education that meets the unique needs of each child and family. We have made attempts to address the demand for family choice and personalization in education, but these programs are costly and not included in current school funding formulas. Adding additional basic entitlement funds will allow Mount Ascension to function as a public charter option.

Please refer to Appendix 1 for the Mount Ascension Logic Model

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

Mount Ascension is designed for a multitude of students who find that a traditional school schedule and culture do not meet their needs. Mount Ascension will remove barriers that prevent students from attending a traditional school. This innovative learning environment will provide students with a proficiency-based learning platform with flexibility in obtaining the credits necessary for graduation. Students from many backgrounds and geographical locations may choose Mount Ascension. Among those who may benefit most from this model are those at risk of school failure and/or those who are credit deficient as a result of a variety of educational disruptions including homelessness, homebound circumstances, mental health crises, or other extenuating circumstances.

Mount Ascension will offer both a completely virtual learning option and a blended learning option. The blended model of Mount Ascension is unique in that students can participate in virtual online courses asynchronously while also attending school synchronously for programs and courses of interest. Parents, students, and educators will design a learning pathway that is innovative and unique to the needs of the individual student. Students living in the Helena area will have access to public schools' on-campus offerings including but not limited to fine arts, career and technical education, dual enrollment courses, work-based learning experiences, and certificate programs.

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

There are several ways for students and their families to learn about Mount Ascension. At-risk students may be referred by counselors, group home case managers, our district homeless liaison, our district EL coordinator, teachers, or principals. Parents will receive communication about this program through our district website, social media, and newsletters. Enrollment for Mount Ascension will be ongoing to meet students' needs throughout the school year. Elementary students must be engaged in Explore School, and middle school and high school students must be enrolled in a minimum of two courses. Interested

students and families will be able to access information through targeted marketing campaigns, both online and offline, to reach interested students and families who seek a personalized education experience that empowers students to thrive academically, socially, and personally. We are committed to fostering a supportive and inclusive learning community which promotes each student reaching their academic potential, having mastered the skills and knowledge to support future aspirations to become responsible global citizens. At this time, enrollment in Mount Ascension will be open and not subject to lottery limitations.

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.

The educational experience within Mount Ascension is unique for each student. The education advocate will meet with the student, parents, counselors, assistant principals, and any other team members to create a personalized learning plan and experience for each student that includes online learning offered on campus, online learning at home, and on-campus courses. This hybrid learning design will meet the needs of the students and accelerate them towards graduation and a high school diploma within their own timeline and interests. Students and families will have the opportunity to design a learning plan that meets the needs and interests of the student through the development of a Personalized Learning Plan (PLP). The PLP will be developed in collaboration with the student, their parents, the student's education advocate, and other appropriate staff and/or family members. The PLP will serve as a blueprint to ensure students' academic and personal goals are met. Opportunities may include service learning and career exploration within their schedule of courses. Students will have access to our catalog of Career and Technical Education (CTE) courses that are aligned to the Montana Career Pathways and recognized by the Montana University System. These courses offer students opportunities to obtain dual credits, work-related job experience, internships, and pre-apprenticeship programs. This flexibility will enable innovation and adaptability to the unique needs of the student population.

Student achievement will be assessed on an ongoing basis. It will consider the subject matter, the grade level, and students' individual needs. 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.

Elementary and middle school students enrolled in Explore School only will not take district benchmark assessments. All other middle school students will take the district benchmark, iReady, three times per year. This assessment can be taken online from home or on campus. Any gaps in reading and math skills will be discussed with the family and plans for academic intervention will be agreed on and implemented. They will also take the state assessment required under federal educational guidelines. High school students will participate in practice ACT and ACT, which will evaluate their college and career readiness. Students' education advocates, in collaboration with parents and in consultation with school counselors, will discuss the students' strengths and potential career pathways.

We anticipate the majority of middle and high school Mount Ascension students will use the Edgenuity online platform for their online coursework. This online curriculum and learning management system tracks student engagement, progress, and success in each course and has built in progress monitoring to track standards and proficiency on the standards. Students will create goals when they enter the Academy and will periodically assess their progress towards those goals with their education advocate.

Students in grades 6-12 will also have access to Montana Digital Academy's (MTDA) robust course offerings as a component of their virtual or blended learning. These courses provide students with rigorous content – some with dual credits – to enrich and support their post-high school opportunities.

Students will also have the opportunity to access in-person classes. For example, a student may have a particular interest in music performance, foreign language, art, health careers, career technology programs, or advanced placement courses that are best delivered in an in-person setting.

Multi-Tiered Systems of Support (MTSS) will be provided for all learners. Education advocates will meet with each family and student to support the unique needs of the student. Assessment data will help inform the programming established for the student. PLPs will ensure each student receives comprehensive academic and behavioral support to foster student engagement and academic growth. The student's education advocate will monitor the student's growth through ongoing progress monitoring. This practice will ensure that if the student begins to struggle, the student's PLP will be adjusted to reflect the needs of the student. Additional academic and/or behavioral support can be provided, and the family will be informed regularly of their student's progress. For example, a student who is struggling with Tier 1 instruction may need Tier 2 support in the form of additional small group instruction and support. If appropriate, some students may benefit from Tier 3 academic support, including one-on-one tutoring and/or specific accommodations. Depending on the student's needs and the family's preferences, to ensure the academic and behavioral health needs of the student are met, community health and wellness resources will be available. These resources will be provided through a Mount Ascension Assistance Team (MAAT) process through the recommendation of the student's education advocate.

Special education services will be provided synchronously by licensed special education staff. Students with an Individual Education Plan (IEP) will have synchronous access to HPSD service providers as defined through IEP goals and objectives. Students who have been provided MTSS services who continue to struggle may be referred for a special education evaluation. These referrals will be made through the MAAT, at the recommendation of the student's education advocate, with the knowledge and approval of the student's parent.

Mount Ascension's Indian Education for All (IEFA) services will advocate for Native American students and their families so they can feel proud of their heritage and culture, experience a sense of belonging in the public school system, achieve academic and personal success, and become productive lifelong learners. The HPSD's current IEFA staff will work to ensure Native American students and their families have access to IEFA programming and support services, including small group support and cultural opportunities, as well as IEFA experiences that are currently infused into all curricular areas K-12.

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

Mount Ascension Learning Academy 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.

The Mount Ascension Learning Academy will have five satellite campuses: Helena Middle School, C.R. Anderson Middle School, Capital High School, Helena High School, and Explore School. Students will attend the campus within their existing school district boundary unless they request a different satellite campus. Each school will offer a space, referred to as the Mount Ascension Learning Laboratory, that includes access to an outside entrance. The Mount Ascension Learning Laboratory classroom is a physical space at each satellite campus where students can do their coursework online, get tutoring support, and check in/check out with their education advocate each day. Students who are all virtual will be required to attend regular Teams meetings to check in with their education advocate, discuss progress towards goals, and get any educational support that they may need in their courses. Courses offered on campus will follow the curriculum and standards of Helena Public Schools and the state of Montana.

Students seeking a high school diploma from the HPSD must meet the district's 23-credit requirement for graduation.

Mount Ascension courses will be offered within the HPSD school calendar to ensure students have every opportunity to access in-person classes and be able to integrate into a school community to the extent that they and their family deem appropriate. Whether they are using the blended learning option or the fully virtual learning option, students will be able to participate in a variety of on-campus activities and learning experiences available during the school year. Additionally, families will be able to meet with their students' education advocates on campus, virtually, or through a home visit option.

Students will be provided with essential technology including a Chromebook or laptop and a Wi-Fi hot spot if needed. Technology support will be provided to families during posted service times. Students and families will be provided with initial training in software, utilizing Microsoft Teams as the virtual meeting platform. Students will access the online learning curriculum via Clever, the single sign on for the HPSD.

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.

Both Edgenuity and MTDA allow for teachers to modify and accommodate the lessons and modules to meet the needs of students, especially those on IEPs or 504s. MTSS will be provided for all learners. Education advocates will meet with each family and student to support the unique needs of the student. Assessment data will help inform the programming established for the student. PLPs will ensure each student receives comprehensive academic and behavioral support to foster student engagement and academic growth. The student's education advocate will monitor the student's growth through ongoing progress monitoring. This practice will ensure that if the student begins to struggle, the student's PLP will be adjusted to reflect the needs of the student, additional academic and/or behavioral support can be provided, and the family will be regularly informed of their student's progress. As noted above in section 4, students who continue to struggle after the implementation of MTSS supports may be referred for an evaluation under the Individuals with Disabilities Education Act (IDEA). Students with an IEP will have synchronous access to HPSD service providers as defined through the IEP's goals and objectives. Students who qualify for gifted and talented programming will have access to this program through the HPSD. Students will have the opportunity to access these services through a virtual or in-person format, depending on their preferences and geographical location.

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: www.helenaschools.org

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

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

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

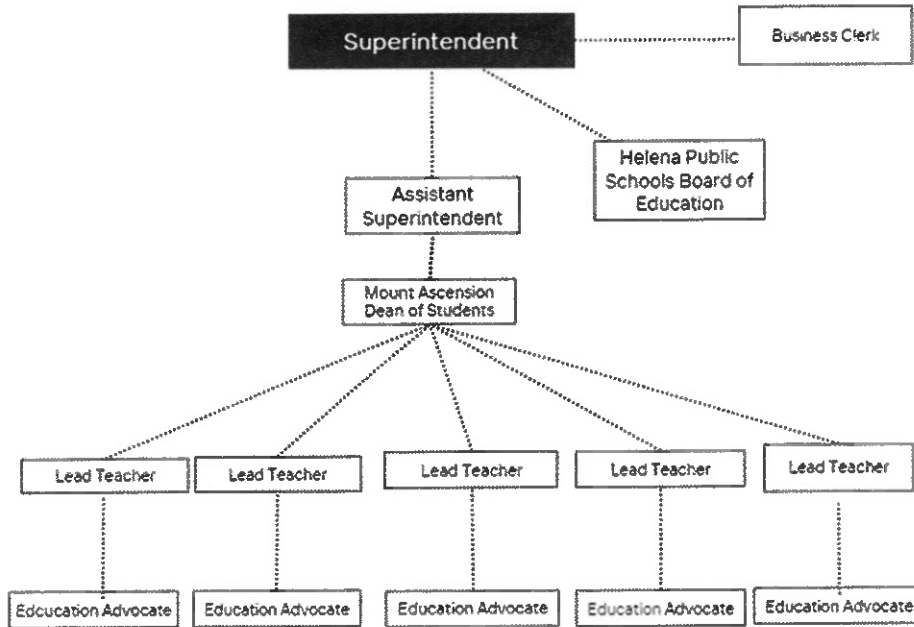
SCHOOL GOVERNANCE

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.

9. 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 Mount Ascension Learning Academy will be governed by the HPSD Board of Education. The superintendent will report directly to the board of education. The business clerk will report directly to the superintendent. Operating under the superintendent is the assistant superintendent, and under the assistant superintendent is the dean of students for the Mount Ascension Academy. This person will oversee day-to-day operations of all five satellite sites. Each site will have a lead teacher. This certified licensed teacher will that courses are modified to include any IEP and 504 requirements. Each lead teacher will work with an education advocate to guide students on their journey to success within Mount Ascension.

**MOUNT ASCENSION LEARNING
ACADEMY ORGANIZATIONAL
CHART**



10. 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 Mount Ascension Learning Academy 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.

All students have the opportunity to attend in-person courses. All students, blended or virtual, will have an education advocate with whom they will meet on a weekly basis, either in-person or virtually. Staff dedicated to the Mount Ascension Learning Academy are listed below:

POSITION	FTE Year 1	FTE Years 2-5
Dean of Students	1.0	1.0
Certified Teacher	5.0	10.0
Education Advocate	5.0	5.0
Total Anticipated FTE	11.0	16.0

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

Mount Ascension Learning Academy Start Up Plan

Charter School Proposal Application

Student Enrollment Goals		
GOAL 1.1: By March 2024, Mount Ascension Learning Academy will finalize its course catalog, registration information, and FTE.		
Goal 1.2: In April 2024, Mount Ascension Learning Academy will open enrollment.		
Goal 1.3: In June 2024, students enrolled will have course schedules and meet with their education advocate.		
Action Steps	Who	When
1. The Mount Ascension staff will finalize the course offerings for the 2024-2025 school year as well as registration procedures.	Mount Ascension staff	1 meeting per month January, February, March until decisions are finalized
2. The Mount Ascension staff will collaborate with the assistant superintendent's office to manage enrollment.	Mount Ascension staff and assistant superintendent	Ongoing starting April 2024 and continuing through the year
3. Regular district enrollment procedures will be employed.	Administrative assistant and dean of students	Starting in April of 2024 and ongoing throughout the school year with open enrollment
4. Identify the classrooms or wings of each of the five satellite sites that will be used for the program. Ensure that each site has a door with an outside exit so that students may come and go outside of the daily school schedule.	School principals, dean of students, facilities director	April 2024
5. Develop a handbook of expectations.	Dean of students	June 2024
Staffing Goals		
Goal 2.1: By March 2024, the dean of students will be hired, and Mount Ascension Learning Academy will onboard the teachers for each of the five satellite sites.		
Goal 2.2: By June 2024, the teachers will make contact with the students and begin crafting PLPs.		
Goal 2.3: By March 2025, education advocates will be hired to assist teachers in developing PLPs and to address the growing enrollment.		
Action Steps	Who	When
1. Teachers that are currently teaching the Mount Ascension program in the district will be onboarded for the new charter school.	Current teachers	March 2024

2. 1 Dean of Students will be hired	Superintendent and assistant superintendent	March 2024
3. The dean and teachers are trained on the virtual learning platform.	Curriculum director, assistant superintendent, dean of students, and teachers	July 2024

Governance Goals

Goal 3.1: In January 2024, Mount Ascension Charter School will be approved by the Montana Board of Public Education.

Goal 3.2: In February 2024, HPSD Board of Trustees will approve Mount Ascension Charter School.

Goal 3.3: From March-June 2024, HPSD will purchase equipment, materials, and supplies.

Goal 3.4: By August 1, 2024, the Mount Ascension Learning Academy parent and student handbook will be completed.

Action Steps	Who	When
1. Mount Ascension Learning Academy will gain approval from the Montana Board of Education.	Superintendent and assistant superintendent	January 2024
2. Mount Ascension Learning Academy will gain approval from the HPSD Board of Trustees	Superintendent and assistant superintendent	February 2024
3. HPSD will purchase equipment, materials, and supplies.	Technology director and curriculum director	June 2024
4. A parent and student handbook will be written and completed.	Assistant superintendent, dean of students, HPSD HR Director, HPSD chief of staff	August 2024

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

Mount Ascension Learning Academy is an equal opportunity employer and will seek to hire the best talent available to fill positions. This will be completed in consideration of internal talent as well as external recruitment efforts in accordance with district policies and negotiated agreements. Vacancies will be advertised through a variety of social media such as LinkedIn, Indeed.com, the school district website and Facebook; associations such as Helena Wins; and partnerships with local colleges and participation in job fairs. All applications for employment will be submitted via the district’s website using the online applicant tracking system.

All new hires participate in a new employee orientation, and new teachers are assigned a mentor. Ongoing professional development and growth opportunities are provided throughout the school year to include a mentoring program, professional learning, tuition and fee reimbursement, professional leave, sabbatical leave, and instructional coaches that help staff improve instructional delivery.

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.

Mount Ascension Learning Academy 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.

Partnerships with business can support real-time curriculum adaptation to reflect the issues that companies are facing and can better prepare students and faculty to tackle real-world challenges. Mount Ascension Learning Academy will have several partnerships which will enhance students' experiences and provide numerous opportunities in resources and experiential learning for students, faculty, and staff.

Business partnerships provide unique opportunities for companies to engage their employees and stakeholders as well as to yield unique perspectives and new understandings of dynamic challenges they are facing and explore new opportunities.

Bringing students and employers together can help decrease the skills gaps that industry partners may be experiencing and implement educational programs to meet those needs. Rather than focusing mostly on classroom learning, Mount Ascension will work to incorporate more experience-based learning techniques, giving students the opportunity to receive hands-on experience and maintain an advantage in the job-seeking community.

Edgenuity – Edgenuity is a standards-based online learning resource for school districts covering core, elective, credit recovery, technical, and career subjects. Edgenuity offers a personalized learning experience for each student as well as a comprehensive suite of resources for teachers and administrators.

MTDA – The Montana Digital Academy is the state online program for Montana, supporting instruction for Montana students in partnership with public schools across the state.

Boeing – With a facility located in Helena, Boeing partners with the HPSD to bring innovation, curiosity, and preparation for real-world experiences in machining and aviation. Our partnership with Boeing offers state of the art machining equipment for our high school CTE programming and internships and job shadowing at the Boeing facility.

Helena Community College – Helena College is a public community college which has been a strong partner with the HPSD, offering a variety of associate degrees in arts, science and applied science as well as technical proficiency certificates in various fields.

Carroll College – A strong community partner, Carroll College provides a variety of support through two partnerships with the Education and Master Social Work programs. These programs support the academic and wellness needs of our student body.

Flathead Community College – In partnership with Flathead Community College, students can earn dual credits in culinary arts and start on a career path in culinary.

Gallatin Community College – In partnership with Gallatin Community College, students enrolled in drafting classes can earn dual enrollment credits, leaving high school with college credits and a start on multiple career paths.

Myrna Loy Center –The Myrna Loy brings arts experiences into school classrooms and many other organizations. Their teaching artists aim to teach, to inspire, to empower, and to generate a lifelong love of the arts for everybody—regardless of ability, mobility, experience, or age.

Holter Museum – The Holter employs a variety of platforms, strategies, and modalities to provide access to engagement. The Holter Museum actively reaches out and invites audiences to engage with contemporary art and supports them in that engagement.

Helena Symphony – Provides symphonic experiences which inspire students to pursue music education through the Symphony Kids Series. Created for children 5-10, these imaginative 30-minute performances with narration and actors, introduce children to the world of music and instruments, and impart life lessons through interactive stories. Following each concert, children are invited to try instruments at the Instrument Petting Zoo.

The Helena Symphony also provides nearly 2,000 fourth and fifth graders from all over the region learn the importance of music in one’s education and life through an age-appropriate concert which features music education in an engaging story telling experience.

17. Provide the proposed calendar and sample daily schedule.

Students will follow the annual school calendar set forth by the HPSD Board of Trustees. Students enrolled in the Mount Ascension Learning Academy must be enrolled in a minimum of two classes, with a maximum of 8 credit-bearing classes per grading period. The HPSD’s regular school schedule will be utilized for students who wish to take in-person courses. Students enrolled in a blended schedule or virtual school day have the option of attending in-person for part or all their schedule. As the virtual courses will be based on proficiency rather than seat time, students will be able to move through their virtual studies at a pace that reflects the flexibility, personalization, and self-paced learning designed to support and meet the diverse needs and preferences of individual students and families.

Sample Blended Schedule Middle School:

Period 1: 8:05-9:00 Orchestra (in-person)

Period 2: 9:05-10:00 Physical Education (in-person)

Period 3: 10:05-11:00 Online Algebra 1 (in transition center with teacher support)

Period 4: 11:00-11:55 Online Physical Science (in transition center with teacher support)

Lunch with peers 11:55-12:25

12:30 Leave for remainder of day to complete online ELA, social studies, and French classes

Sample Virtual Schedule Middle School with one day of Exploration Works:

Monday: 9:00 am-2:30 pm Exploration Works Science Center Programming

Tuesday-Friday: At least two virtual classes through Edgenuity or MTDA, per the student's PLP

Thursday: 10:00-10:30 Virtual check-in with education advocate

Sample Blended Schedule High School:

8:00-11:00 M, W, F: Onsite work-study program for credit (arranged through education advocate)

8:00-11:00 T, Th: Option to attend in-person at Transition Center for individualized academic support

10:30-11:00 Th: Check-in (virtual or in-person) with education advocate

Lunch and return to school 11:00-12:00

Period 5: 12:05-1:00 Jazz Band (in-person)

Period 6: 1:05-2:00 Advanced Placement Art (in-person)

Period 7: 2:05-3:00 French 3 (in-person)

Sample Virtual Schedule High School:

Monday-Friday: Minimum of two virtual classes through Edgenuity or MTDA, per the student's PLP.

Thursday: 10:00-10:30 Virtual check-in with education advocate

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 who are attending virtually will not need transportation. Students who are attending a blended model of instruction will have access to the HPSD student transportation services using regularly scheduled transportation routes. All students will have access to on-site food service options.

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

Mount Ascension recognizes that co-curricular activities enrich learning for students. Mount Ascension will endeavor to adapt co-curricular activities that students are interested in to provide all students with the opportunity to enhance their educational experience.

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.

Student participation in extra-curricular activities will be governed by MHSA policies.

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 2).

21. Describe the insurance coverage that will be obtained.

Please see HPSD current insurance policy, attached (Appendix 3).

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

Please see a detailed budget attached to this application (Appendix 4)

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.

N/A

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

Space for the five Mount Ascension satellite sites has been identified. Expansion plans, pending charter designation, will be included in the Master Facility Plan currently underway.

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.

Since Covid there has been an increase in community demand for online and blended learning programs that can meet the needs of students. Although students have returned to in-person learning, the Covid-19 pandemic and the aftereffects on students emphasized the need for and benefits of robust learning that is flexible to the needs of students. Starting in the fall of 2023, Helena Public Schools has offered four satellite sites of the Mount Ascension Learning Laboratory. Mount Ascension offers personalized learning for students who have experienced an educational disruption and may need to learn online for a period of time while transitioning back into the school setting. Mount Ascension is an innovative classroom that allows students to learn in an inclusive environment with a teacher who can meet the students' needs. The classroom offers:

- **Accessibility:** Students can easily transition from home learning to on-campus learning through a small inclusive classroom and online learning options.
- **Individualized learning:** Families, administrators, and counselors craft learning plans that meet the needs of the student and provide for the whole child.
- **Flexibility:** Students can design a learning experience that accounts for schedules that would usually be a barrier to attending school including jobs, internships, family obligations, etc.
- **Family involvement:** Families have a first-hand approach to designing a learning program that meets the needs of their student and their family.

The Mount Ascension classrooms will expand into the Mount Ascension Learning Academy where we will continue to meet the needs and demands of the family and community through the following ways:

- Comprehensive Needs Assessment
- Community Partnerships
- Support Services

27. Describe the opportunities and expectations for parent involvement.

Designing a high quality, robust learning plan that is individualized to the needs and goals of a student requires family and parent involvement. Education is a collaborative effort involving not only dedicated educators but also families and parents. Mount Ascension is committed to creating a school community in which parents are actively engaged in the learning journey of their children, and we welcome their involvement. Parents will participate in the following ways:

- **Onboarding Parent Workshop:** Each student who enrolls in the Mount Ascension Learning Academy will have an onboarding experience with a parent workshop. Families will learn how to access the virtual curriculum, express any needs that their students may have, obtain hot spots for increased connectivity, and begin building a relationship with the school and educators.

- **Home Visits:** Teachers, the dean, or the education advocate will arrange for a home visit with students and families when they enroll. The home visit is a choice for families at their home or a neutral meeting place like a park. This helps to build relationships between the home and the school.
- **Volunteer Opportunities:** Parents are encouraged to volunteer with student activities as opportunities to come together for community events will build the culture and climate of the school.
- **Weekly Updates from the Dean:** Each week the dean will send out a newsletter with updates pertaining to the Mount Ascension Learning Academy.
- **Coffee with the Dean:** Once a month, the dean will offer an opportunity for parents to come and have coffee and ask questions or discuss issues that they have.
- **Monthly Virtual Checks in with the Teacher or Education Advocate:** This is an opportunity for parents and families to discuss if the PLP is working successfully for the student or if it needs to be adjusted.

Appendices

Appendix 1: Mount Ascension Learning Academy Logic Model

Appendix 2: HPSD Board Policies:

7012-Procurement-of-Supplies-Materials-Equipment-and-Services-Using-Federal-Funds

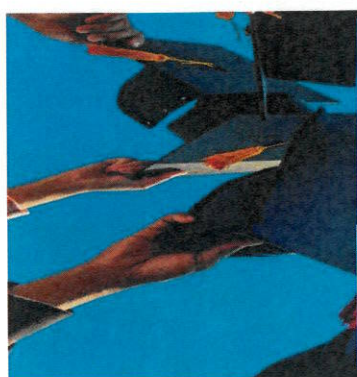
7030-Accounting-and-Audits

Appendix 3: HPSD current insurance policy

Appendix 4: Proposed Mount Ascension Learning Academy Budget

Questions? Contact bpe@Mountgov

Mount Ascension Learning Academy Logic Model



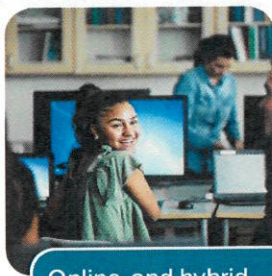
Goal: Mount Ascension Learning Academy provides proficiency based learning for students to earn credits at their own pace and design a learning experience that prepares them for college or careers.

Theory of Action: With an online/hybrid learning experience students can learn at their own pace in an environment that they feel comfortable in while participating in courses on campus that propel them towards college and career readiness.



Parent, family, and community engagement

- Parents and can design a personalized pathway that meets the needs of their student.
- Connect with other online/hybrid learners.
- Community support of programming.



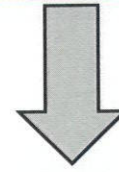
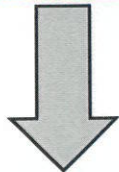
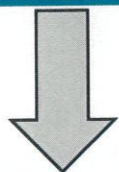
Online and hybrid learning

- On demand tutoring available 24/7.
- Small on campus learning environments with dedicated staff.
- Proficiency based learning for accelerated credits.



Career and college readiness

- Students can take on campus courses that fit their skills and future career and college needs.



Goals and Outcomes

Working with families and community to connect students to services and support.

Students feel connected with the community and other learners.

Students feel safe supported and connected.

Students can obtain a high school diploma along with certifications and dual credit.

Students will experience success at their own pace.

Students can earn certificates, dual credit, internships, and job shadowing in fields that they are interested in.

Students have reliable access to technology, on the job experience, and higher-level

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 I/MC, 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 ****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 ****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 ****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

Data Budget is reviewed by Janelle Mickelson and the board of trustees.
Gathering:

A.DD.16 Purchases are recorded properly as to account, amount, and period. Account distributions are recorded by the operating department and reviewed by the accounting department.

Data ****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.

A.DD.17 The accounts payable trial balance is compared with individual open invoice totals and reconciled to the general ledger control account.

Data ****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.

A.DD.22 SELF FUNDED INSURANCE
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.

Data Claims are handled by Alligaint and files are maintained in the HR Benefit Specialists office.
Gathering:

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	Control Environment: Those in charge of governance possess the required skills to and regularly evaluates management and their effectiveness of promoting a sound control environment.
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.
A.EL.02	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.
Data Gathering:	**CHANGED** Management has established a very strong tone at the top. The management leads by example. The district also employs Kalava 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 district.
A.EL.04	Risk Assessment: If the entity has an informal or ad hoc risk assessment process, has entity identified and addressed how applicable business risks impact financial reporting objectives.
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.
A.EL.05	Control Activities: Management designs and implements controls that address identified risks related to financial reporting and/or misappropriation of assets.
Data Gathering:	**CHANGED** Client has a strong safeguards 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.
A.EL.08	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.
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 function properly.

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

A-2

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.

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.

Helena Public Schools
Charter School Budget
Mount Ascension Charter School Application

**Helena Public Schools
Charter School Budget: Initial Assumptions and Projection
Mount Ascension Charter School Application**

Overall Description Details	Assumptions	Amount	Number	Total
Description				
General	Assume a \$1,139,558 annual budget (figures have been rounded)			
Number of Students	A total of at least 92 students in grades 1 to 12. The charter will expand and contract to respond to increases and decreases in student enrollment.	92	92	92
High School	At least 41 high school students	41	41	41
Middle School	At least 21 students in 7th and 8th grade	21	21	21
Elementary School	At least 10 students in 6th grade	10	10	10
Elementary School	At least 20 students in the 1st to 5th grade	20	20	20
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	150	
Average Teacher Salary	Average teacher salaries in HSD are near \$51,500	\$51,500.00		

Revenues	Assumptions	Amount	Number	Total
Description				
\$343,483 Middle School Basic Entitlement	We project we will meet the minimum enrollments of the 41 high school students and 21 middle school students for the basic entitlement			
\$114,493 High School Basic entitlement		\$343,843.00	1	\$343,843.00
Elementary School Basic entitlement		\$114,493.00	1	\$114,493.00
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	\$7,634.00	41	\$312,994.00
State ANB formula for Elementary	per elementary ANB	\$7,634.00	21	\$160,314.00
Quality Educator Payment	per certified Staff	\$5,962.00	30	\$178,860.00
Data for Achievement	per ANB	\$3,673.00	6	\$22,038.00
At Risk Payment	per student count	\$23.58	92	\$2,169.36
Indian Education for All	per ANB	\$28.88	92	\$2,656.96
American Indian Achievement Gap	per Native American student, we don't know at this time	\$24.63	92	\$2,265.96
Applicable State Grants	equitable share of appropriate grants	\$242.00	0	\$0.00
Applicable Federal Grants	equitable share of appropriate grants	\$0.00	92	\$0.00
Local Tax Revenue	local taxes will be used according to equitable share of local levies	30%	92	\$0.00
Grants and Fundraising		\$0.00	0	\$0.00
TOTAL REVENUE				\$1,139,634.28

Expenditures	Assumptions	Amount	Number	Total
Description				
Personnel				
School Administrator	prorated per student enrollment	\$109,000.00	1	\$109,000.00
Education Advocate/ Counselor	prorated per student enrollment	\$51,500.00	4	\$206,000.00
Library	prorated per student enrollment	\$51,500.00	0.5	\$25,750.00
Teachers	prorated per student enrollment	\$51,500.00	5	\$257,500.00
Para Professionals	None	\$21,650.00	0	\$0.00
Clerical	prorated per student enrollment	\$33,650.00	0.5	\$16,825.00
Nurse	prorated per student enrollment	\$51,500.00	0.25	\$12,875.00

Helena Public Schools
Charter School Budget
Mount Ascension Charter School Application

Custodial	prorated per student enrollment	\$34,600.00	0.5	\$17,300.00
Fringe Benefits (leave etc.)	20% additional to employee salary	\$129,050.00	20%	\$129,050.00
Insurance Benefits	\$10,000 per employee	\$117,500.00	\$10,000 per	\$117,500.00
	TOTAL PERSONNEL		11.75	\$891,800.00

Instruction				
Description	Assumptions	Amount	Number	Total
Textbooks	\$250 per student	\$250.00	92	\$23,000
Online Curriculum	\$150 per student per course , 6 courses per student	\$900.00	92	\$82,800.00
Classroom Supplies	\$20 per student	\$20.00	92	\$1,840.00
Computers/ tech devices	\$600 per student	\$600.00	92	\$55,200.00
Shipping Costs	\$100 per student	\$100.00	92	\$9,200.00
Software	\$100 per student	\$100.00	92	\$9,200.00
Field Trips	none budgeted at this time	\$0.00	0	\$0.00
Instructional Equipment	Staff Laptop/tech devices \$900 each	\$900.00	11.75	\$10,575.00
Library and Media	included above	\$0.00	0	\$0.00
Hotspots, Internet Connections	\$80.00 per student	\$80.00	92	\$7,360.00
Classroom Equipment	none budgeted at this time	\$0.00	0	\$0.00
	TOTAL INSTRUCTION			\$199,175.00

Supplies and Services				
Description	Assumptions	Amount	Number	Total
Office Supplies	\$300 per FTE	\$300.00	11.75	\$3,525.00
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	11.75	\$11,750.00
Travel for Staff Site to Site	\$216 per staff	\$216.00	11.75	\$2,538.00
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%	\$1,139,634.28	2.70%	\$30,770.13
	TOTAL SUPPLIES AND SERVICES			\$48,583.13

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				\$1,139,634.28
Total Expenditures				\$1,139,558.13
Surplus (Deficit)				\$76.15