

Montana Board of Public Education

Helena Public School District Project for Alternative Learning 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
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.	6
SCHOOL GOVERNANCE	8
BUSINESS OPERATIONS	13
COMMUNITY SUPPORT AND NEED	14
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.	14
Appendix	16

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

Name of Public Charter School: HPSD Project for Alternative Learning 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 HPSD School Board Chair
Name 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 Superintendent
Name 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 Project for Alternative Learning Charter School**

Provide an executive summary with the general purpose and rationale for the creation of the public charter school. This should be concise in this section and expanded upon in the additional information attached to the application. Include your mission and vision statement.

The HPSD Project for Alternative Learning (PAL) 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.

Current PAL students' mission statement: "This is our school, a place of knowledge, tolerance, respect and understanding. We welcome the people who want to be here, and we invite them to share in our unique learning community. We are unique individuals and allow individuals to be unique. We work together not only to listen, but to hear what each other has to say and to respect and learn from our differences."

The HPSD PAL 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 engage with the 120 students and their families seeking an alternative educational option for their students, providing families choice and students personalized educational experiences.

Mission Statement: The HPSD PAL Charter School 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, having mastered 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 the HPSD PAL Charter School, we envision a future where 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.

Opening Date: _____ August 2024 _____ Public Charter Term Length: 9 months/year _____
Grades to be served: 10-12 initially, plans to expand with 9th grade _____
Minimum Enrollment Per Year: 65 _____
Planned Enrollment Per Year: 80 _____
Maximum Enrollment Per Year: 120+ _____

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											15	30	30	75
Year 2										10	15	30	35	90
Year 3										10	20	35	35	100
Year 4										10	25	35	35	105
Year 5										15	25	40	40	120

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.

The HPSD Project for Alternative Learning Charter School’s mission and vision are to include and empower students who struggle socially, emotionally, and academically in a learning environment that is conducive to their unique needs. Project for Alternative Learning Charter school will recognize every student’s individuality and help provide them and the community with educational, personal, and vocational resources.

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

The HPSD Project for Alternative Learning Charter School will support students in the community from all backgrounds. Students with disabilities identified under IDEA, those on 504s, and those who meet Title One criteria and McKinney Vento status will be among the student population served. Students with and without barriers in their lives will be welcome to apply for application. The charter school will serve our students who struggle in the traditional school setting and offer them a pathway to a college or career track.

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

School counselors at the two traditional high school sites will inform students and families regularly about the Project for Alternative Learning Charter School. Other opportunities for recruitment and enrollment will include family information nights, visits to the two high schools from the charter school administration, student meetings, student visits to campus with administration and staff, and an

orientation day for new students and guardians. Students will work with their home high school to complete an application that covers student and guardian perceptions of why the student would benefit from attending the charter school, and students' current teachers will provide recommendations and information regarding how the charter school may benefit the student. The current PAL facility may not be able to house all interested students. If a lottery system is needed, students will have an interview with the charter school's administrator, the counselor, and one of the school's teachers to expand on their need for attendance at the charter school. Students will enroll at the charter school on a quarterly basis.

Please see a copy of an application example (Appendix 1), a teacher referral to attend PAL example (Appendix 4), and a student survey example (Appendix 5).

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.

Students' academic programming at the PAL Charter School will be vastly unique from the traditional high school setting. Students will acquire credits through a 3-week block system instead of a semester system. Students will earn .1 credits in each class period during the 3-week block. This model allows students flexibility with their credit acquisition if they are struggling mentally/physically/emotionally for a period of time. Class offerings will be unique relative to credit awarded at the two traditional high schools. Classes offered at the PAL Charter School will focus on hands-on activities and experience-based learning. Students will regularly be given the opportunity to apply their knowledge from the classroom in the "real world." The charter school will work towards using a proficiency model to assess student knowledge. Students will demonstrate their knowledge of the subject through projects, presentations, and experiential learning. Seniors will work with the counselor to apply for scholarships and colleges, take dual-enrollment classes, and connect with potential employers about work opportunities. Students will also complete a job shadow experience to learn about a career field of interest and report back on their experience and knowledge gained. The school will also direct students to attend local college fairs, aid in college visits, and help students acquire soft skills needed to obtain internships, job shadows, and employment opportunities. The goal of the PAL Charter School will be for 100% of students to have a combination of the following by the time they graduate: have taken dual-enrollment classes, be presently employed, have a plan for an internship, or be registered/enrolled in a post-secondary school.

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.

A detailed example of the HPSD PAL Charter School weekly schedule is attached at the end of this application (Appendix 4).

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

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

State standards will be met in the curriculum offered at the PAL Charter School. Class offerings will be unique and different compared to traditional class offerings. Classes at the charter school will emphasize interactive, experiential, and hands-on opportunities. Students will routinely be on field trips as part of their curriculum. The charter school will align itself with existing state standards, with emphasis placed on those in the CTE field for ninth through twelfth grade. Particular emphasis will be on the following standards: CTE.9-12.1.1 *Act as a responsible and contributing citizen and employee* and CTE.9-12.1.2 *Apply appropriate academic and technical skills*.

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

The PAL Charter School instructional framework blends academics with intervention to address the social, emotional, and behavioral needs of each individual student. The instructional framework scaffolds tools and strategies to support teachers' efforts to target these areas. A daily check in/check out model with each student's school advisor is built into the schedule. The advisor helps with school planning, career planning, and support in all areas of students' lives. The learning environment is often dependent on the subject matter of the class. Classes may require both outdoor and indoor classroom time. Many of the classes will center around project-based learning or experience opportunities. Class sizes will vary but will not typically exceed 15 students in any single class period. Classes will be offered in a three-week block system rather than the traditional semester model. This will allow students to more easily catch up on content if they are experiencing an educational disruption for a period of time.

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 PAL Charter School will follow state and federal laws regarding identification and educational service of special education students, English Language Learners, those who are academically challenged, and gifted students. The charter school's primary goal is to serve students who are at risk of dropping out of high school. Students may have experienced homelessness, child welfare system involvement, juvenile justice system involvement, and medical or mental health crises.

The PAL Charter School will follow all applicable school board policies and state and federal laws regarding student discipline policies. Discipline will be addressed with students and families regarding violations of school expectations. For special education students, should suspensions reach 10-days, the school will meet with the family for a manifestation determination meeting.

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

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

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

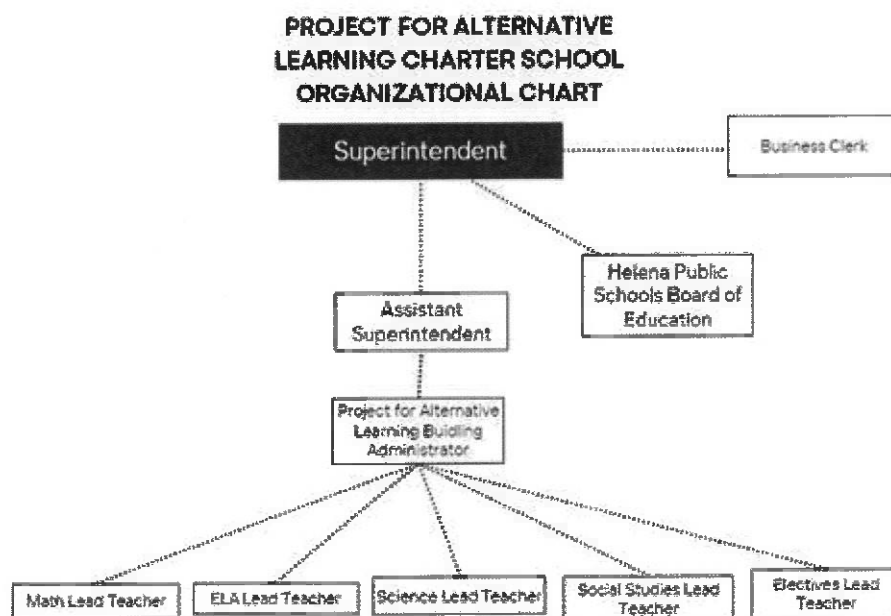
Special Education: [3060-Misconduct-by-Students-with-Disabilities.pdf \(helenaschools.org\)](#)

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.

1. 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 PAL 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. Operating under the superintendent is the assistant superintendent, and under the assistant superintendent is the building administrator for the PAL Charter School. This person will oversee all day-to-day operations. Additionally, the building administrator will ensure that students are enrolled in the correct courses, that courses are modified to include any IEP and 504 requirements, and that students are making adequate progress. Each lead teacher will act as an advisor to a portion of the enrolled students and will guide students on their journey to success within the PAL Charter School. Together with the student and family, a learning plan will be developed for each student based on their goals. This will be used to connect them with community support and opportunities to help them achieve their goals.



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

The HPSD Board of Trustees will be the governing body of the PAL 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.

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

Staffing will be evaluated on an on-going basis to align with the needs of the students, program capacity, and content areas needed.

FTE	Description
1	Teacher - Social Studies/Special Education
1	Teacher - Social Studies
1	Teacher - School Counselor
1	Teacher - English
1	School Nurse
1	Teacher - Science
1	Teacher - Vocational Ed/Technology
0.5	Teacher - Art
1	Teacher - Math
1	Teacher - English/Homeless Liaison

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

Project for Alternative Learning Charter School Start Up Plan

Charter School Proposal Application

Student Enrollment Goals		
GOAL 1.1: In March 2024, PAL Charter School will finalize registration information and FTE.		
GOAL 1.2: In April 2024, PAL 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: In September 2024, a program expansion plan for years 2-5 will be established.		
Action Steps	Who	When
1. Review applications, offer student placements, and establish a waiting list.	Building administrator	April-August 2024
2. Work with the community to survey for expansion.	District office	August 2024
3. Work with key stakeholders to plan program expansion.	Assistant superintendent	September 2024
4. Advertise program expansion.	District communications specialist	October 2024
5. Enroll new students for 2024-2025.	Building administrator	April 2024
Staffing Goals		
GOAL 2.1: Determine current staffing needs.		

GOAL 2.2: Reallocate FTE to PAL Charter School.		
Action Steps	Who	When
1. Review all applications to determine staffing needs.	Assistant superintendent	April 2024
2. Advertise teaching positions to meet the demand for expanded PAL programming.	Human resources	June 2024

Governance Goals		
GOAL 3.1: HPSD PAL Charter School will be approved by the Montana Board of Public Education.		
GOAL 3.2: HPSD Board of Trustees will approve the PAL Charter School.		
GOAL 3.3: HPSD PAL Charter School's parent and student handbooks will be finalized.		
Action Steps	Who	When
1. The Montana Board of Public Education will approve the PAL Charter School.	State of Montana	January 2024
2. HPSD Board of Trustees will be asked to approve the PAL Charter School.	Superintendent	January-February 2024
3. Updated parent and student handbooks will be presented to the HPSD Board of Trustees for approval.	Assistant superintendent	July 2024

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

The Project for Alternative Learning Charter School 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 as well as 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.

6. 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.

7. State the proposed governing bylaws.

The PAL 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).

8. 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. The PAL Charter School has 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, The PAL Charter School 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.

9. Provide the proposed calendar and sample daily schedule.

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

An example of a detailed application is attached to the end of this application (Appendix 4).

"A" Day (Monday and Wednesday)	"B" Day (Tuesday and Thursday)	Friday	STAT Monday
-----------------------------------	-----------------------------------	--------	-------------

<i>Time</i>	<i>Period/Activity</i>	<i>Time</i>	<i>Period/Activity</i>	<i>Time</i>	<i>Period/Activity</i>	<i>Time</i>	<i>Period/Activity</i>
8:20-9:15	Advisor	8:20-9:15	Advisor	8:20-8:35	Advisor	8:20-8:35	Advisor
9:15-10:45	2nd	9:15-10:45	5th	8:35-9:15	All School	8:35-10:45	STAT
10:45-11:20	Lunch	10:45-11:20	Lunch	9:15-10:00	2nd	10:45-11:20	Lunch
11:20-12:50	3rd	11:20-12:50	6th	10:00-10:45	3rd	11:20-12:20	2nd
12:50-1:05	Snack Shack	12:50-1:05	Snack Shack	10:45-11:20	Lunch	12:20-1:20	3rd
1:05-2:35	4th	1:05-2:35	7th	11:20-12:05	4th	1:20-1:35	Snack Shack
2:35-3:15	Advisor Check Out*	2:35-3:15	Advisor Check Out	12:05-12:50	5th	1:35-2:30	4 th *

*2:30 dismissal on Monday, no PM Advisor

12:50-1:05	Snack Shack
1:05-1:50	6th
1:50-2:35	7th
2:35-3:15	Advisor Check Out

*2:30 dismissal on Monday, no PM Advisor

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 the 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.

The PAL Charter School recognizes that co-curricular activities enrich learning for students and will endeavor to adapt co-curricular activities that students are interested in to provide all students with the opportunity to enhance their educational experience.

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 5).

21. Describe the insurance coverage that will be obtained.

Please see HPSD's current insurance policy which is attached (Appendix 6).

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

Please see a detailed budget attached to this application (Appendix 7).

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.

NA

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

HPSD currently has a facility for this program. Pending charter school status and the anticipated growth of the program, we anticipate the need to allocate additional space to this program. HPSD is currently conducting a Master Facility Plan which includes opportunities for new space for this charter program. In the meantime, the district will provide access to as many students as possible, offering multiple opportunities for students to seek placement each year.

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.

The PAL Charter School will work with various organizations throughout the community. Organizations that will aide in the charter school's mission include: Hometown Helena, Kiwanis International, Helena

College, The Myrna Loy, Helena Parks and Recreation Department, Montana Fish Wildlife and Parks, The Gates of the Mountains, Helena Education Foundation, Lewis and Clark County Library, Montana World Affairs, Montana Judicial Institute, The Great Divide, Montana Summer Jobs Program, TRIO, and Smiles Across Montana. Each of these organizations will partner with the PAL Charter School to provide students with job shadowing experiences, internship opportunities, and employment opportunities.

27. Describe the opportunities and expectations for parent involvement.

Family involvement will be a crucial component for the PAL Charter School. The school will hold regular information nights for families to attend and learn about the offerings and operations of the charter school. In addition, the charter school will invite families to events throughout the school year to participate in family engagement activities. Examples include Thanksgiving luncheon, senior presentations, and student-led conferences. Informational pamphlets with information about the PAL Charter School will be available for families at both traditional high school settings, and the school website will be updated with information. When new students join the PAL Charter School, they will also have an opportunity to receive a home visit from PAL staff to welcome them and onboard them to the program more quickly.

Please see a HPSD Project for Alternative Learning Charter School information night example (Appendix 8).

Questions? Contact bpe@mt.gov

HPSD Project for Alternative Learning Charter School Application

Appendices

- Appendix 1: Project for Alternative Learning Charter School Application example
- Appendix 2: Project for Alternative Learning Charter School teacher referral example
- Appendix 3: Project for Alternative Learning Charter School student survey example
- Appendix 4: Project for Alternative Learning Charter School weekly schedule
- Appendix 5: HPSD financial plan and policies, including financial controls and audit requirements.
- Appendix 6: HPSD current insurance coverage.
- Appendix 7: Project for Alternative Learning Charter School budget summary
- Appendix 8: Project for Alternative Learning Charter School information night example

Project for

Alternative

Learning



Application



Project for Alternative Learning (PAL)

815 Front Street, Helena, MT 59601

(406) 324-1630 Fax: (406) 324-1631

Charting a New Course

Welcome to PAL. Taking the step to apply for the program means you have decided to make your education a priority. If accepted, you agree to uphold and support the philosophy, curriculum, benchmarks, policy and procedures in place for the program. We use a multi-faceted educational model that works best when students are motivated and are accountable for their learning. Please take some time to review these ideas as you move through the application.

At PAL, we enroll families. We look for families with a spirit of community, a willingness to build relationships based on trust, and students who will enrich life within our school environment. Parents are an integral part of our school and they will be asked to remain committed to their child's education.

If you and your family want this kind of learning experience, please take time to fill out an application and return it to your guidance counselor at your home school or to PAL.

I thank you in advance for taking the time to apply to PAL and taking the step to make your education a priority.

Matt Carey, Principal

PAL Mission

The mission of PAL is to facilitate academic growth through career exploration and cross-curricular activities within a diverse learning community.

Student Statement of Philosophy - TARPIT

Tolerance-Acceptance-Respect-Pride-Individuality-Trust

This is our school, a place of knowledge, tolerance, respect and understanding. We welcome the people who want to be here and we invite them to share in our unique learning community. We are unique individuals and allow individuals to be unique. We work together not only to listen, but to hear what each other has to say and to respect and learn from our differences.

Application Process

At PAL we want to engage students and their families in all aspects of the application, admission and education process. In order to apply for PAL, students and their parent(s) and/or guardian(s) must complete the following steps with the assistance of your home school guidance counselor:

CHS guidance: 324-2500

HHS guidance: 324-2200

Step 1: Attend a PAL information meeting. Home school guidance office has handout with dates and times (can also pick up at PAL). Attending an information meeting gives you a chance to understand more about our school culture and learning environment.

Step 2: Complete the following sections of the application and return to your guidance counselor:

- ___ Part 1 *Application for Admission* completed by student and parent.
- ___ Part 2 *Student Questionnaire* completed by student.
- ___ Part 3 *Parent Questionnaire* completed by parent/guardian.
- ___ *Part 4 *Teacher/Counselor Referrals* completed by high school staff familiar with the applicant's academic, social and/or emotional history.

* To be completed by the high school counselor.

Step 3: Following the initial application screening, you may be invited for an interview with the principal, counselor and teacher to ensure PAL is the right for you and your family. You will receive a phone call setting up the meeting date and time.

Step 4: When notified of acceptance into PAL you will need to:

- A) Start the process of turning in material/books to your current school;
- B) Make arrangements for transportation to PAL;
- C) Expect a home visit with two PAL staff to be scheduled prior to the first day of the quarter. The date/time will be agreed on by the family and PAL staff;
- D) Be prepared to attend a 1-hour student and parent orientation meeting on day 1 of the quarter you have been accepted.

Return all materials to your school guidance counselor.

If you have questions, contact your guidance counselor or:

The Project for Alternative Learning (PAL)

815 Front Street

Helena, MT 59601

(406) 324-1630

Part 1

Application for Admission

Current Date: _____

Full Name: _____
Last First M.I.

Address: _____
Number Street

City or Town State Zip Code

Home Phone/Cell _____ E-Mail _____

Sex M F Date of Birth ___/___/___ Place of Birth _____

Current School: Helena High Capital High Current Grade: _____

Elementary School(s) _____

Middle School(s) _____

High School Counselor: _____ School Therapist: _____

Private Counselor or Therapist: _____

Do you have an Individualized Education Plan (IEP)? Yes No 504 Plan? Yes No

If yes, who is your Case Manager? _____

Applicant lives with: Both Parents Mother Father Legal Guardian

Full Name of Parent(s)/Guardian(s):

(circle)
Name _____ Parent, Guardian, other explain _____
Best Phone Number _____ cell, home, work
Alternate Number _____ cell, home, work

(circle)
Name _____ Parent, Guardian, other explain _____
Best Phone Number _____ cell, home, work
Alternate Number _____ cell, home, work

Part 2

Student Reasons for Coming to PAL

1. Why do you want to be enrolled in school at PAL?
(use complete sentences)

2. What are you willing to do to demonstrate to students and staff your commitment to the PAL program? (example, "come to school every day and work hard in class")

3. What are your long-term goals? (education, career, family, personal)

If selected, I, as the student, agree to take responsibility in developing and fully participating in the educational program provided for me by the Project for Alternative Learning throughout my high school career.

Student Signature: _____

Date: _____

Part 3

Parent Reasons for Student Coming to PAL

1. Why do you want your student to be enrolled in school at PAL?
(use complete sentences)

2. What do you see as your responsibility with regards to your student's education?
What are you willing to do to ensure the success of your student at PAL?
(use complete sentences)

3. Do you feel your student has special need for extended services?
Academic _____ Social _____ Emotional _____

If my student is selected, I, as a parent/guardian, agree to take part in developing and participating in the educational program of my son/daughter throughout his/her high school career.

Parent/Guardian Signature:

Date: _____

P A L



Project for Alternative Learning (PAL)

Teacher Referral Form

Teacher _____

Class _____

School _____

Date _____

_____ is applying for admission to PAL. Please take some time to provide information concerning their potential success.

Has the student had success in your class? (We would be interested in academic progress, peer interaction, learning styles, behavior in class, parental involvement)

Do you think placement at PAL would be successful? What comments would you give to staff to help teach this student?

Do barriers exist in this student's life need to be addressed in order for their education to be optimal? What are those barriers?

Thank you,
PAL Staff

Return to your School Guidance Counselor By: _____

7. Why would you make a great addition to PAL?

8. Who do you know here?

9. Tell us about a time you were successful / proud of yourself? What did you learn?

10. Tell us about a time you were not successful / made a poor choice? What did you learn?

11. Any medications?

12. Therapists?

13. Who do you live with?

14. Anything else that you would like us to know about you?

15. Questions?

PAL Bell Schedule 2023-2024

"A" Day (Monday and Wednesday)		"B" Day (Tuesday and Thursday)		Friday		STAT Monday	
Time	Period/Activity	Time	Period/Activity	Time	Period/Activity	Time	Period/Activity
8:20-9:15	Advisor	8:20-9:15	Advisor	8:20-8:35	Advisor	8:20-8:35	Advisor
9:15-10:45	2nd	9:15-10:45	5th	8:35-9:15	All School	8:35-10:45	STAT
10:45-11:20	Lunch	10:45-11:20	Lunch	9:15-10:00	2nd	10:45-11:20	Lunch
11:20-12:50	3rd	11:20-12:50	6th	10:00-10:45	3rd	11:20-12:20	2nd
12:50-1:05	Snack Shack	12:50-1:05	Snack Shack	10:45-11:20	Lunch	12:20-1:20	3rd
1:05-2:35	4th	1:05-2:35	7th	11:20-12:05	4th	1:20-1:35	Snack Shack
2:35-3:15	Advisor Check Out*	2:35-3:15	Advisor Check Out	12:05-12:50	5th	1:35-2:30	4th

*2:30 dismissal on Monday, no PM Advisor

12:50-1:05	Snack Shack
1:05-1:50	6th
1:50-2:35	7th
2:35-3:15	Advisor Check Out

*2:30 dismissal on Monday, no PM Advisor

Block Schedule Dates, STAT Mondays STAT Monday - Morning of Next Block			
Block 0	8/30/23 to 9/4/23	No STAT	3 days
Block 1	9/5/23 to 9/24/23	9/25/2023	14 days
Block 2	9/25/23 to 10/15/23	10/16/2023	15 days
Block 3	10/16/23 to 11/5/23	11/6/2023	13 days
Block 4	11/6/23 to 12/3/23	12/4/2023	17 days
Block 5	12/4/23 to 1/1/24	TBD	14 days
Block 6	1/2/24 to 1/21/24	1/23/2024	13 days
Block 7	1/23/24 to 2/11/24	2/12/2024	14 days
Block 8	2/12/24 to 3/3/24	3/4/2024	14 days
Block 9	3/4/24 to 3/24/24	4/1/2024	15 days
Block 10	4/1/24 to 4/21/24	4/22/2024	15 days
Block 11	4/22/24 to 5/12/24	5/13/2024	14 days
Block 12	5/13/24 to 6/6/24	6/5/24, End of School	17 days

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	ACCOUNTS PAYABLE ACTIVITIES The appropriate level of management or another appropriate person periodically compares actual expenditures to budgeted expenditures and follows up on significant variances.
Data	Budget reports are reviewed during the budget and finance committee meetings. The chairperson of the committee provides a report to the full Gathering: board at the monthly board of trustee meetings.
A.DD.02	Purchasing is separated from requisitioning, shipping, receiving, and inventory recording functions, and access to the vendor master file is restricted to authorized personnel.
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 they are reviewed and authorized.
Gathering:	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]. 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
Data	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 or" confirmations electronically to the purchase order.
A.DD.04	Invoice processing and accounts payable are segregated from the general ledger function.

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 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.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 School's 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 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 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.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 ****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: _____	FAX (A/C, No): _____
	PHONE (A/C, No, Ext): (406) 442-5360	E-MAIL ADDRESS: _____
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: Lloyd's Syndicate 2987 (Brit Syndicates Limited)	NAIC # _____
INSURED Helena Public Schools 1325 Poplar Street Helena, MT 59601	INSURER B: Montana State Fund	15819
	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"/> PROJECT <input type="checkbox"/> LOC 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 checked="" 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 <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 \$			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)	\$
								\$
							EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
B	<input checked="" type="checkbox"/> 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	\$ 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	<input checked="" type="checkbox"/> 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

CANCELLATION

INFORMATIONAL	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 Longeneo</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.

Helena Public Schools
Charter School Budget
Project for Alternative Learning Charter School Application

**Helena Public Schools
Charter School Budget: Initial Assumptions and Projection
Project for Alternative Learning Charter School Application**

Overall Description Details				
Description	Assumptions	Amount	Number	Total
General	Assume a \$951,202 annual budget (figures have been rounded)			
Number of Students	A total of at least 75 students in grades 10 to 12 in year one, with expansion of 10 9th graders in the next year. The charter will expand and contract to respond to increases and decreases in student enrollment.	75	75	75
High School	At least 75 high school students	75	75	75
Middle School	Not expected	0	0	0
Elementary School	Not expected	0	0	0
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 \$51,500	\$51,500.00		

Revenues				
Description	Assumptions	Amount	Number	Total
High School Basic entitlement \$343,483	We project we will meet the minimum enrollments of the 75 high school students the basic entitlement			
High School Basic entitlement	\$343,843.00	\$343,843.00	1	\$343,843.00
Middle School Basic entitlement	\$114,493.00	\$114,493.00	0	\$0.00
Elementary School Basic entitlement	\$57,246.00	\$57,246.00	0	\$0.00
State ANB formula for High School	per high school ANB	\$7,634.00	75	\$572,550.00
State ANB formula for Middle School	per middle school ANB	\$7,634.00	0	\$0.00
State ANB formula for Elementary	per elementary ANB	\$5,962.00	0	\$0.00
Quality Educator Payment	per certified Staff	\$3,673.00	8	\$29,384.00
Data for Achievement	per ANB	\$23.58	75	\$1,768.50
At Risk Payment	per student count	\$28.88	75	\$2,166.00
Indian Education for All	per ANB	\$24.63	75	\$1,847.25
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	75	\$0.00
Applicable Federal Grants	equitable share of appropriate grants	\$0.00	75	\$0.00
Local Tax Revenue	local taxes will be used according to equitable share of local levies	30%	57	\$0.00
Grants and Fundraising		\$0.00	0	\$0.00
	TOTAL REVENUE			\$951,558.75

Expenditures				
Description	Assumptions	Amount	Number	Total
Personnel				
School Administrator	prorated per student enrollment	\$109,000.00	1	\$109,000.00
Counselor	prorated per student enrollment	\$51,500.00	1	\$51,500.00
Library	prorated per student enrollment	\$51,500.00	0.1	\$5,150.00
Teachers	prorated per student enrollment	\$51,500.00	7	\$360,500.00
Para Professionals	None	\$21,650.00	1	\$21,650.00
Clerical	prorated per student enrollment	\$33,650.00	1	\$33,650.00
Nurse	prorated per student enrollment	\$51,500.00	0.1	\$5,150.00

Helena Public Schools
Charter School Budget

Project for Alternative Learning Charter School Application

Custodial	prorated per student enrollment	\$34,600.00	1	\$34,600.00
Fringe Benefits (leave etc.)	20% additional to employee salary	\$124,240.00	20%	\$124,240.00
Insurance Benefits	\$10,000 per employee	\$122,000.00	\$10,000 per	\$122,000.00
TOTAL PERSONNEL			12.2	\$867,440.00

Description	Assumptions	Amount	Number	Total
Textbooks	\$250 per student	\$250.00	75	\$18,750
Online Curriculum	\$150 per student per course , 1 course per student	\$150.00	75	\$11,250.00
Classroom Supplies	\$10 per student	\$10.00	75	\$750.00
Computers/ tech devices	\$175 per student	\$175.00	75	\$13,125.00
Shipping Costs	none budgeted at this time	\$0.00	75	\$0.00
Software	\$25 per student	\$25.00	75	\$1,875.00
Field Trips	Multiple career oriented field trips	\$5,000.00	multiple	\$5,000.00
Instructional Equipment	Staff Laptop/tech devices \$550 each	\$550.00	12.2	\$6,710.00
Library and Media	included above	\$0.00	0	\$0.00
Hotspots, Internet Connections	\$80.00 per student	\$0.00	0	\$0.00
Classroom Equipment	none budgeted at this time	\$0.00	0	\$0.00
TOTAL INSTRUCTION				\$57,460.00

Description	Assumptions	Amount	Number	Total
Office Supplies	\$50.00 per FTE	\$50.00	12.2	\$610.00
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	not needed	\$0.00	0	\$0.00
Travel for Staff Site to Site	\$216 per staff, not needed	\$0.00	0	\$0.00
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%	\$951,558.75	2.70%	\$25,692.09
TOTAL SUPPLIES AND SERVICES				\$26,302.09

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

Description	Assumptions	Amount	Number	Total
Total Revenue				\$951,558.75
Total Expenditures				\$951,202.09
Surplus (Deficit)				\$356.66

PAL Info Night

- Program – PAL is not its own school
 - Sophomores –Senior
 - Max # of students
 - Smaller # of students in class, typically capped at 12 students depending on subject
 - More hands-on activities
 - Creative Courses – but same credit requirements as Capital High and Helena High
 - Busses in morning and afternoon from Capital High and Helena High
 - Limited on space and facilities
 - No gym, or shop – limited electives
 - Creative on classes
 - Upon entering may attend electives at home school but issues arise on scheduling and availability (must be in good credit standing)
 - Must drive or walk no bussing

- Reason for coming to PAL
 - Want to earn diploma
 - Teachers will learn and know everything about you- are not able to slip through the cracks

- TARPIT – Philosophy of PAL
 - T – Tolerance
 - A – Acceptance
 - R – Respect
 - P – Pride
 - I – Individuality
 - T – Trust

- Daily schedule - 6 periods per week, 3 classes a day + daily advisor (same schedule as HHS/CHS)
 - Advisor/registration for courses

- 3-week blocks
 - .1 credit – 10 blocks = 1 credit
 - 12 Blocks at PAL = 1.2 credits in a year

- Orientation 9 weeks- 3 Blocks
 - Work out to academy
 - 1st Block – Getting to know you
 - Not a lot of academics, get acquainted and familiar with school
 - 2nd Block – Academic
 - Will have all subjects, focus back on academic rigor
 - 3rd Block – Trust Block
 - Blended school day, has been ½ day school, ½ day work experience
 - Presentation to committee to stay at PAL
 - Committee is comprised of advisor, new advisor, guardians and whoever student wishes to invite staff or family

- Academy
 - Regular school between orientation and senior status
- Senior status
 - Less than 7 credits
 - Special classes (Dual enrollment, FAFSA, careers, college visits)
 - Senior project/paper – presentation, internship, speech
- Graduation – students may be done as soon as they earn the needed credits
 - PAL has one as well as you can attend home school
 - Transcripts/diplomas will only say home school
- Attendance **NO homework must be in class to earn credit**
 - 15 days in a typical block
 - 2nd absence lose credit for the class *exception is medical or extenuating
- Application Process
 - Complete/return application from your counselor at your homeschool
 - Counselors will meet with PAL each quarter to discuss applicants
 - Review of applicants and set up appointments with students
 - Similar to a job interview – Why do you want to be at PAL?
 - PAL Staff will review applicants and make decisions
 - Students notified
 - Students who are not selected do not need to fill out another application for the current year, just need to inform counselor's that they are still interested in attending PAL
 - Successful students will receive a home visit upon selection before their orientation class begins

Information Night 4pm (For Upcoming Quarter) / Application Deadline Schedule

- | | |
|---|---|
| <p><u>Quarter 1, Begin Quarter 2</u></p> <ul style="list-style-type: none"> • Thursday, September 14 • Tuesday, September 26 | <p><u>App Deadline for Qtr. 2 Consideration:</u></p> <p style="text-align: center;">September 20, 2023</p> <p>Counselors meet at PAL: September 27, 2023</p> |
| <p><u>Quarter 2, Begin Quarter 3</u></p> <ul style="list-style-type: none"> • Tuesday, November 28 • Tuesday, December 5 | <p><u>App Deadline for Qtr. 3 Consideration:</u></p> <p style="text-align: center;">December 5, 2023</p> <p>Counselors meet at PAL: December 8, 2023</p> |
| <p><u>Quarter 3, Begin Quarter 4</u></p> <ul style="list-style-type: none"> • Thursday, February 8 • Tuesday, February 20 | <p><u>App Deadline for Qtr. 4 Consideration:</u></p> <p style="text-align: center;">February 14, 2024</p> <p>Counselors meet at PAL: February 22, 2024</p> |
| <p><u>Quarter 4, Begin Fall 2024</u></p> <ul style="list-style-type: none"> • Thursday, April 25 • Tuesday, April 30 | <p><u>App Deadline for Qtr. 1 Consideration:</u></p> <p style="text-align: center;">May 1, 2024</p> <p>Counselors meet at PAL: May 8, 2024</p> |