

[SCHOOL DISTRICT]
1000FE SERIES
FLEXIBILITY AND EFFICIENCY

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1000FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Overview of Flexibility and Efficiency Policies

The _____ Board of Trustees has adopted and committed to a governance structure that keeps the focus of the Board on students and that increases the District’s flexibility and efficiency to maximize the District’s resources that are available for the benefit of students and student achievement through available innovations.

In furtherance of this policy, the Board has adopted and implemented the following processes:

- Regular scanning conditions that will impact the District’s intended success and the community and students served (*Policy 1001FE*);
- Developing and annually updating the District’s SMaC (Specific, Methodical and Consistent) recipe identifying practices that have created a replicable and consistent formula for success (*Policy 1002FE*);
- Developing and annually updating the District’s technology platform in coordination with the District’s SMaC Recipe (*Policy 1003FE*); and
- Annually reviewing available innovation, flexibility and/or efficiency strategies/policies, documenting the rationale for implementing certain strategies/policies and, likewise, documenting the rationale for deciding that such strategies are not best for the District and the community and students served (*Policies 1004FE-1012FE*).

1001FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Scanning of the Horizon

At each regular meeting of the Board the agenda will include an opportunity for the Board to engage in future scanning of the horizon to identify external emerging issues and trends (what is being scanned) that are relevant (the reason the District is scanning) to the District's and the students' success over the coming years. This ongoing process assists the Board in identifying barriers or drivers to the District's intended success and developing strategies for drivers to success and solutions to identified barriers to success.

The District will discuss and document ongoing anticipated changes, if any, in the following areas/conditions that will have an impact on the District and on students' success over the coming years:

- Demographics
- Business and Economic Climate
- Science and Technology
- Politics and Social Values
- Legislation and Regulation

In examining each of these areas, the District will discuss and identify current conditions, trends and assumptions about the future (5 years).

[School District]

Adopted on:
Reviewed on:

1002FE

FLEXIBILITY AND EFFICIENCY

Revised on:

The District's SMaC Recipe

The District is committed to the development and to annually update the District's SMaC (Specific, Methodical and Consistent) Recipe.

A SMaC recipe is a set of durable operating practices that create a replicable and consistent success formula. It is clear and concrete, enabling the entire District and community to unify and organize its efforts, giving clear guidance regarding what practices have worked and what practices have not worked in order to guide the District in making decisions and implementing practices that will lead to continuous improvement and desired success. A SMaC recipe reflects empirical validation and insight about what actually works and why.

[School District]

Adopted on:
Reviewed on:

1002FE-F

FLEXIBILITY AND EFFICIENCY

Revised on:

SMaC Analysis

At the _____ meeting of the _____ School District, the Board of Trustees reflected on and took stock of the successes and failures of the _____ School District over the past ____ years and developed a SMaC Recipe. The District discussed the following:

- A. _____ School District’s greatest successes achieved over the last ____ years.
- B. _____ School District’s most significant disappointments over this same timeframe.
- C. What specific practices correlate with the successes but not the disappointments?
- D. Which of the practices associated with our successes can endure, remain relevant and last between _____ to ____ years and apply across a wide range of circumstances to further our success?
- E. What specific practices correlate with the disappointments but not the successes?
- F. What insights do we have regarding why these specific practices work?
- G. What can we do, collectively and individually, to avoid the specific practices associated with past disappointments?

Based on all of the above, the District developed and has continually updated its SMaC recipe, consisting of points that reinforce each other as a coherent system and codified as an expression of what best drives the _____ School District’s successes.

The District’s SMaC recipe can be found on the District’s website.

[School District]

Adopted on:
Reviewed on:

1003FE

FLEXIBILITY AND EFFICIENCY

Revised on:

The District's Technology Program (SMaC 2)

The District is committed to the development of and to annually update the District's technology program.

In addition to how the District effectively incorporates technology into its learning opportunities for students, staff, parents and the community, the District will analyze the following areas:

- Social Media – How the community comes together to learn about and share perspective on the District;
- Mobile Technology – How the District personalizes the delivery of information via mobile technology to different audiences;
- Analytics – How the District derives, analyzes and uses information on the community's and public's use of your technology to derive insights;
- Cloud Computing – How the District provides an elastic and scalable data warehouse to increase transparency and provide ease of access by your community and the public.

Scaled Innovations

The District is committed to an ongoing process of reviewing available innovation, flexibility and/or efficiency strategies/policies, documenting the rationale for implementing certain strategies/policies and, likewise, documenting the rationale for deciding that such strategies are not best for the District and the community and students served.

The District will, on an annual basis, conduct an analysis of available innovations by using the following 4 Knowledge Based Decision Making (KBDM) questions to gain informed perspective:

1. What do we know about our stakeholder’s needs, wants, and preferences that are relevant to this decision?
2. What do we know about the current realities and evolving dynamics of our environment that is relevant to this decision?
3. What do we know about the capacity and strategic position of our district that is relevant to this decision?
4. What are the ethical implications?

[School District]

Adopted on:
Reviewed on:

1004FE-F

FLEXIBILITY AND EFFICIENCY

Revised on:

At the _____ meeting of the _____ School District, the Board of Trustees, using the Knowledge Based Decision Making questions, analyzed and made decisions on the available innovation, flexibility and/or efficiency strategies/policies. The following captures the District’s discussions and decisions:

Scaled Innovations Analysis

Date of Discussion	Specific innovation, flexibility and/or efficiency strategy	Decision to implement (Y/N)	Rationale for the District’s decision
	Proficiency-based ANB for <ul style="list-style-type: none"> • Advanced learners • Homebound instruction • Alternative instruction during discipline • General flexibility for families • Flipped instruction model • Distance learning 		
	Transfers for School Safety		
	Multidistrict Agreements		
	Increase in Over Base Levy Without a vote		
	Flexible Licensing		
	Early Enrollment Exceptional Circumstances		
	Cooperative Purchasing		
	Non-voted Levy for Excess IDEA Costs		
	Etc.		

[School District]

Adopted on:
Reviewed on:

1005FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Proficiency-Based ANB

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing the provision of law allowing proficiency-based ANB.

[OPTION] The District may include in its calculation of ANB a pupil who is enrolled in a program providing fewer than the required aggregate hours of pupil instruction required under Montana law if the pupil has demonstrated proficiency in the content ordinarily covered by the instruction as determined by the school board using district assessments. The ANB of a pupil who demonstrates proficiency in any content/subject matter will be converted to an hourly equivalent based on the hours of instruction ordinarily provided for the content over which the student has demonstrated proficiency.

[OPTION] The District may, on a case-by-case basis, provide fractional credit for partial completion of a course for a student who is unable to attend class for the required amount of time.

[OPTION] The District may waive specific course requirements based on individual student needs and performance levels. Waiver requests shall also be considered with respect to age, maturity, interest, and aspirations of the students and shall be in consultation with the parents or guardians.

[OPTION] At the discretion of the District, a student may be given credit for a course satisfactorily completed in a period of time shorter or longer than normally required and, provided that the course meets the District's curriculum and assessment requirements, which are aligned with the content standards stated in the education program. Examples of acceptable course work include, but are not necessarily limited to, those delivered through correspondence, extension, and distance learning courses, adult education, summer school, work study, specially designed courses, and challenges to current courses.

Legal Reference:	20-1-301, MCA	School fiscal year
	20-9-311(4)(a)(b)(d), MCA	Calculation of average number belonging (ANB) – 3-year averaging
	20-3-324, MCA	Powers and duties
	10.55.906 ARM	High School Credit

[School District]

Adopted on:
Reviewed on:

1006FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Transfers for School Safety

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing the provision of law allowing transfers of funds to improve school safety and security.

The District may transfer state or local revenue from any budgeted or non-budgeted fund, other than the debt service fund or retirement fund, to its building reserve fund in an amount not to exceed the school district's estimated costs of improvements to school safety and security

The transfer of such funds can be for:

1. planning for improvements to school safety, including but not limited to the cost of services provided by architects, engineers, and other consultants;
2. installing or updating locking mechanisms and ingress and egress systems at public school access points, including but not limited to systems for exterior egress doors and interior passageways and rooms, using contemporary technologies;
3. installing or updating bullet-resistant windows and barriers; and
4. installing or updating emergency response systems using contemporary technologies.

Any transfers made under this policy and Montana law are not considered expenditures to be applied against budget authority. Any revenue transfers that are not encumbered for expenditures in compliance with the four reasons stated above, within 2 full school fiscal years after the funds are transferred, must be transferred back to the originating fund from which the revenue was transferred.

If transfers of funds are made from a District fund supported by a non-voted levy, the District may not increase its non-voted levy for the purpose of restoring the transferred funds.

Legal Reference:	20-9-503, MCA	Budgeting, tax levy, and use of building reserve fund.
	20-9-236, MCA	Transfer of funds – improvements to school safety and security

[School District]

Adopted on:
Reviewed on:

1007FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Multidistrict Agreements

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing multidistrict agreements whenever possible.

Montana law (20-3-363, MCA) allows the boards of trustees of any two or more school districts to enter into a multidistrict agreement to create a multidistrict cooperative to perform any services, activities, and undertakings of the participating districts and to provide for the joint funding and operation and maintenance of all participating districts upon the terms and conditions as may be mutually agreed to by the districts

The agreement must be approved by the boards of trustees of all participating districts and must include a provision specifying terms upon which a district may exit the multidistrict cooperative. The agreement may be for a period of up to 3 years.

All expenditures in support of the multidistrict agreement may be made from the interlocal cooperative fund as specified in [20-9-703](#) and [20-9-704](#). Each participating district of the multidistrict cooperative may transfer funds into the interlocal cooperative fund from the district's general fund, budgeted funds other than the retirement fund or debt service fund, or non-budgeted funds other than the compensated absence liability fund. Transfers to the interlocal cooperative fund from each participating school district's general fund are limited to an amount not to exceed the direct state aid in support of the respective school district's general fund. Transfers from the retirement fund and debt service fund are prohibited. Transfers may not be made with funds restricted by federal law unless the transfer is in compliance with any restrictions or conditions imposed by federal law.

Expenditures from the interlocal cooperative fund are limited to those expenditures that are permitted by law and that are within the final budget for the budgeted fund from which the transfer was made.

If transfers of funds are made from a District fund supported by a non-voted levy, the District may not increase its non-voted levy for the purpose of restoring the amount of funds transferred.

Examples of flexibility under this policy and Montana Law include but are not limited to:

- A district with a separate high school and elementary budget can enter into an agreement within the district;
- A district may enter into an agreement with any other school district(s) for the sharing of resources, including supplies, services, personnel, etc.

Legal Reference:	20-3-363, MCA	Multidistrict agreements – fund transfers
	20-9-703, MCA	District as prime agency
	2-9-704, MCA	District as cooperating agency

[School District]

Adopted on:
Reviewed on:

1007FE-F1

FLEXIBILITY AND EFFICIENCY

Revised on:

Model Multidistrict Agreement

Model Multidistrict Agreement

This Multidistrict Agreement (hereinafter "Agreement") is entered into this ____ day of _____, 20__ by and between identify participating school districts (collectively hereinafter "Participating District" or "Participating Districts").

WHEREAS, pursuant to section 20-3-363, MCA, the boards of trustees of any two or more school districts may enter into an Multidistrict Agreement to create a multidistrict cooperative to perform any services, activities, and undertakings of the Participating Districts and to provide for the joint funding and operation and maintenance of all Participating Districts upon the terms and conditions as may be mutually agreed to by the districts subject to the conditions of section 20-3-363, MCA;

WHEREAS, an Agreement made pursuant to section 20-3-363, MCA, must be approved by the board of trustees of all Participating Districts;

WHEREAS, all expenditures in support of the Multidistrict Agreement may be made from the interlocal cooperative fund in accordance with sections 20-9-703 and 20-9-704, MCA. Each Participating District of the multidistrict cooperative may transfer funds into the interlocal cooperative fund from the general fund, any budgeted fund, or any non-budgeted fund of the Participating Districts, except as limited/prohibited law as follows:

1. transfers to the interlocal cooperative fund from each Participating District's general fund are limited to an amount not to exceed the direct state aid in support of the respective school district's general fund;
2. transfers from the retirement fund, the debt service fund or the compensated absence liability fund are prohibited; and
3. transfers may not be made with funds restricted by federal law unless such transfer is in compliance with any restrictions or conditions imposed by federal law.

WHEREAS, in accordance with section 20-9-703, MCA, _____ shall be designated as the prime agency. All other Participating Districts shall be designated as cooperating agencies;

WHEREAS, expenditures from the interlocal cooperative fund are limited to those expenditures that are permitted by law and that are within the final budget for the budgeted fund from which the transfer was made.

NOW THEREFORE, the districts hereby agree as follows:

- 1 1. To create a multidistrict cooperative for the purpose of **incorporate purpose(s) here;**
2 2. To create an interlocal cooperative fund for the purpose of transferring funds from the
3 Participating Districts for the purpose(s) stated herein;
4
5 3. The **identify the district designated as the prime agency** is designated as the prime agency
6 and as such shall establish a non-budgeted interlocal cooperative fund for the purpose of the financial
7 administration of this Multidistrict Agreement.
8
9 4. All other Participating Districts are designated as the cooperating agencies and in accordance
10 with section 20-9-704, shall transfer its financial support under this Agreement to the prime agency by
11 district warrant.
12
13 5. Any and all amounts transferred into the interlocal cooperative fund by any Participating
14 District may come from: (a) the respective district's general fund in an amount not to exceed the direct
15 state aid in support of the respective school district's general fund; or (b) any other budgeted fund of a
16 participating district, except that funds cannot be transferred from the retirement fund or the debt service
17 fund; or (c) any non-budgeted fund of a Participating District, except that funds cannot be transferred
18 from the compensated absence liability fund.
19
20 6. Transfers may not be made with funds restricted by federal law unless the transfer is in
21 compliant with any restrictions or conditions imposed by federal law.
22
23 7. Any and all amounts transferred into the interlocal cooperative fund by each Participating
24 District must be for the purpose stated herein as mutually agreed upon between the Participating Districts
25 in accordance with the terms of this Agreement.
26
27 8. The term of this Agreement shall be from _____ to _____.*
28 This Agreement may be extended by mutual approval of each Participating District. However, the term of
29 the Agreement may not extend beyond 3 years. Any remaining fund balance in the interlocal cooperative
30 fund at year end may be carried over to the subsequent fiscal year.
31
32 9. The terms of this Agreement may be changed upon mutual written approval of the
33 Participating Districts.
34
35 10. Each Participating District shall agree how the funds shall be disbursed during the current
36 fiscal year by establishing a budget or guidelines. The prime agency shall adhere to this Agreement. The
37 Participating Districts will be provided with a monthly accounting summary of expenditures from the
38 prime agency.
39
40 11. The multidistrict cooperative may be dissolved upon mutual consent of all Participating
41 Districts in writing upon ___ days written notice to all Participating Districts. In addition, any
42 Participating District may terminate its participation in the multi-district cooperative upon ___ days
43 written notice to all Participating Districts. In the event that the multidistrict cooperative is dissolved in
44 its entirety or any Participating District terminates its participation in the multidistrict cooperative, the
45 provisions of Paragraph 12 below shall apply.
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12. Upon termination of this Agreement by one or all Participating Districts, the funds of the district or districts that no longer desire to participate in this multidistrict cooperative shall be returned to such District(s) on a pro rata share of the current funds held by the prime agency after all outstanding financial obligations have been paid with said funds to revert back to the original fund(s) from which the money was transferred as a result of said District(s) participation in the multidistrict cooperative.

13. This Agreement shall be interpreted according to and governed by the laws of the State of Montana.

As agreed on this ____ day of _____, 20__.

Attest:

** Note: The term of the agreement may be for a period of up to 3 years.*

[School District]

Adopted on:
Reviewed on:

1008FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Increase in Over-Base Levy Authority Without a Vote

It is the policy of the District to increase the flexibility and efficiency of the District's resources by utilizing provisions in law that allow for increases in over-base levy authority without a vote through decreases in other non-voted levies.

Provided that budget limitations otherwise specified in law are not exceeded, the Board of Trustees may in its discretion increase the District's over-base budget levy without a vote if the Board reduces non-voted property tax levies authorized by law to be imposed by action of the Board by at least as much as the amount by which the over-BASE budget levy is increased. The ongoing authority for any non-voted increase in the over-BASE budget levy imposed must be decreased in future years to the extent the Board imposes any increase in other non-voted property tax levies.

Legal Reference: 20-9-308, MCA BASE budgets and maximum general fund budgets

Flexible Instructor Licensing

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing the provision of law allowing flexibility in licensure of instructors and as a means of addressing recruitment and retention of staff. Flexibilities in the following areas are available for the District’s enhancement of its programs and services to enhance student achievement.

- Internships
 - Available to anyone with a current license and endorsement in one subject who wants to move to a new licensed role/endorsed area.
 - Requirements must be satisfied within 3 years
 - Must include a plan between the intern, the school district and an accredited preparation program
- Provisionally Certified
 - May be issued to an otherwise qualified applicant who can provide satisfactory evidence of:
 - The intent to qualify in the future for a class 1 or class 2 certificate and
 - Who has completed a 4-year college program or its equivalent, and
 - Holds a bachelor’s degree from a unit of the Montana university system or its equivalent.
- Substitutes
 - Must have a GED or high school diploma
 - Will have completed 3 hours of training by the district
 - Will have submitted a fingerprint background check
(All requirements can be waived by the district if the substitute has prior substitute teaching experience in another public school from November 2002 to earlier)
 - May not substitute more than 35 consecutive days for the same teacher, however the same substitute can be used for successive absences of different staff as long as each regular teacher for whom the substitute is covering is back by 35 consecutive teaching days
- Retired Educators
 - School district must certify to OPI and TRS that the district has been unable to fill the position due to no qualified applications or no acceptance of offer by a non-retired teacher
 - No limit on the district
 - Retired teacher must have 30 years of experience in TRS
 - There is a 3 year lifetime limit on the retired individual going to work under this provision

- 1 • Class 3 Administrative License
 - 2 ○ Valid for a period of 5 years
 - 3 ○ Appropriate administrative areas include: elementary principal, secondary principal, K-12
 - 4 principal, K-12 superintendent, and supervisor.
 - 5 ○ Must be eligible for an appropriately endorsed Class 1,2 or 5 license to teach in the
 - 6 school(s) in which the applicant would be an administrator or would supervise, and qualify
 - 7 as set forth in ARM 10.57414 through 10.57.418
 - 8 ○ An applicant for a Class 3 administrative license who completed an educator preparation
 - 9 program which does not meet the definition in ARM 10.57.102(2), who is currently
 - 10 licensed in another state at the same level of licensure, may be considered for licensure
 - 11 with verification of five years of successful administrative experience as defined in ARM
 - 12 10.57.102 as documented by a recommendation from a state accredited P-12 school
 - 13 employer on a form prescribed by the Superintendent of Public Instruction and approved
 - 14 by the Board of Public Education. The requirements of ARM 10.57.414(1)(c)(i-iii) must
 - 15 be met by an applicant seeking a superintendent endorsement.
- 16
- 17 • Class 4 for CTE
 - 18 ○ Valid for a period of 5 years
 - 19 ○ Renewable pursuant to the requirements of 10.57.215, ARM and the requirements specific
 - 20 to each type of Class 4 license.
 - 21 ○ 4A – for licensed teachers without a CTE endorsement
 - 22 ○ 4B – for individuals with at least a bachelor’s degree
 - 23 ○ 4C – for individuals with a minimum of a high school diploma or GED
- 24 • Class 5 alternatives
 - 25 ○ Good for a maximum of 3 years
 - 26 ○ Requirements dependent upon the alternative the district is seeking
- 27 • Emergency authorization of employment
 - 28 ○ Individual must have previously held a valid teacher or specialist certificate or have met
 - 29 requirements of rule 10.57.107, ARM
 - 30 ○ Emergency authorization is valid for one year, but can be renewed from year to year
 - 31 provided conditions of scarcity continue to persist

34	Legal References:	10.55.716, ARM	Substitute Teachers
35		10.55.607, ARM	Internships
36		10.57.107, ARM	Emergency Authorization of Employment
37		10.57.215, ARM	Renewal Requirements
38		10.57.420, ARM	Class 4 Career and Technical Education License
39		10.57.424, ARM	Class 5 Provisional License
40		19-20-732, MCA	Reemployment of certain retired teachers,
41			specialists and administrators – procedure –
42			definitions
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Early Enrollment Exceptional Circumstances

It is the policy of the District to provide enhanced educational opportunities to students under the age of 5 when either individual exceptional circumstances exist and/or when Community-Based exceptional circumstances are present.

Prohibition: *This policy cannot be used to provide what is otherwise characterized or referred to as a pre-school, pursuant to 20-7-117(2), MCA, which specifically prohibits the use of state equalization aid for preschool. This policy is intended for use to enroll students under the age of 5 when statutory criteria are met.*

Student Enrollment, Exceptional Circumstances Meriting Waiver of Age Requirements for Pupils

Note: In order to adopt this policy, the board of trustees must select one or more of the characteristics identified in either Option A or Option B.

The administration shall ensure admission, enrollment and assignment of all qualifying children referenced in this policy. The administration shall place children enrolled pursuant to this policy in either a half-time or full-time kindergarten program as an integral part of the elementary school program. The administration shall also ensure provision of a free appropriate public education in the least restrictive environment possible, pursuant to terms of each student’s individualized education program, for all children enrolled under this policy who are qualified for services under the Individuals with Disabilities Education Act.

The administration shall include children enrolled pursuant to this policy in the district’s calculation of average number belonging (ANB) as reported to OPI.

Option A, Student-Specific Exceptional Circumstances: To be used when the board of trustees wants to define exceptional circumstances specific to the individual characteristics of each student or sub-group of students.

The Board of Trustees declares the following to be qualifying “exceptional circumstances” within the meaning of that term as used in 20-5-101(3), that merit waiving the age provisions of 20-5-101(1), MCA for qualifying children under 6 years of age:

*Note: Each of the below should be considered separately for inclusion or exclusion in the Board’s adopted policy.
Note: When enrolling on the basis of an individual student’s characteristics under this Option A, the District must be sure to document each qualifying student’s characteristics to ensure that criteria listed in this portion of the policy can be substantiated.*

1. A child at least 3 years of age with a disability qualifying the child for services under the federal Individuals with Disabilities Education Act.
2. A child who is 4 years of age or older on or before September 10 of the school year in which enrollment is to occur who:
 - a. Meets the income eligibility guidelines for free or reduced price meals under the National School Lunch Program;
 - b. Is Limited English Proficient within the meaning of Title III of the federal Elementary and Secondary Education Act;

- c. Is Gifted and Talented within the meaning of that term as used in 20-7-901, MCA;
- d. Is an enrolled member of a federally recognized American Indian Tribe;
- e. Is homeless as defined in 42 U.S. Code § 11302, or, as determined by the administration, exhibits other characteristics or lives in circumstances that are uncommon, unusual, atypical, rare or otherwise distinguished from ordinary or typical which place the child at risk of failing to achieve at adequate levels.

Option B, Exceptional Circumstances Present in the Community: To be used only for in-district students or homeless students under the McKinney Homeless Assistance Act when the board of trustees wants to define exceptional circumstances applicable to the community's characteristics, as opposed to the individual characteristics of a particular student or sub-group of students.

The Board of Trustees declares the following to be qualifying "exceptional circumstances" within the meaning of that term as used in 20-5-101(3), that merit waiving the age provisions of 20-5-101(1), MCA for children under 6 years of age who are either 4 years of age or older on or before September 10 of the school year in which enrollment is to occur or who are at least 3 years of age with a disability qualifying the child for services under Section 504 of the Federal Rehabilitation Act of 1973 or the federal Individuals with Disabilities Education Act.

Note: Each of the below should be considered separately for inclusion or exclusion in the Board's adopted policy. When enrolling on the basis of demographic characteristics of the community under this Option B, The District must be sure to research and document all of the criteria incorporated into the school district's policy that is used to enroll on the basis of exceptional circumstances.

1. Homeless rates of the district's pupils in comparison to statewide averages;
2. Percentage of the district's pupils qualifying for services under The Federal Individuals with Disabilities Education Act in comparison to statewide averages;
3. Percentage of the district's pupils eligible for free or reduced lunch in comparison to statewide averages;
4. Average performance on standardized tests at the 3rd grade level in comparison to statewide averages;
5. Percentage of the district's pupils who are enrolled members of a federally recognized American Indian Tribe in comparison to statewide averages.

Student Enrollment, Exceptional Circumstances Meriting Waiver of Age Requirements for Pupils

When implementing Board Policy 3100, the District shall follow these procedures:

1. The administration shall review the criteria set forth in the Policy 3100 and make the preliminary determination whether an individual student or class of students meets the criteria for exceptional circumstances set forth therein;
2. The administration shall notify the parent(s)/legal guardian(s) of the administration's recommendation to the Board regarding the enrollment of the student(s) under the exceptional circumstances meriting waiving of the age requirements;
3. The administration shall present the information to the Board for approval within ____ days of making the preliminary determination;
4. In presenting the information to the Board, the administration shall either: (1) remove all identifying information about the student(s) when presenting the information to the Board in order to protect the privacy rights of the student under state and federal law, or (2) provide the name(s) of the students(s) to the Board in a closed session with notice to the parent(s)/legal guardian(s) that he/she/they have the right to attend the closed session; and
5. The Board shall make the final decision on the enrollment of students under the District's exceptional circumstances policy.

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The trustees shall annually review this policy and procedure based on changing circumstances pertaining to the criteria used for determination of the program.

Legal Reference:

- § 20-5-101, MCA Admittance of child to school
- § 20-6-501, MCA Definition of various schools
- § 20-7-117, MCA Kindergarten and preschool programs
- § 20-9-309, MCA Basic system of free quality public elementary and secondary schools defined
- Individual with Disabilities Act Federal Rehabilitation Act of 1973
- National School Lunch Act (Public Law 396, 79th congress, chapter 281, 2nd session)
- Title III, ESEA (English language Acquisition, language Enhancement, and Academic Achievement Act)
- McKinney-Vento Homeless Assistance Act of 1987 (Pub. L. 100-77, July 22, 1987, 101 Stat. 482, U.S.C. § 11301 et seq.

1011FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Cooperative Purchasing

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing provisions in law that allow for cooperative purchasing without the formalities of the bidding process.

The District may enter into a cooperative purchasing contract for the procurement of supplies or services with one or more districts. This allows the District to participate in a cooperative purchasing group to purchase supplies and services through the group without bidding if the cooperative purchasing group has a publicly available master list of items available with pricing included and provides an opportunity at least twice yearly for any vendor, including a Montana vendor, to compete, based on a lowest responsible bidder standard.

An example of flexibility under this policy and Montana Law includes but is not limited to the Montana Cooperative Services (MCS) Program.

Legal Reference: 20-9-204(4), MCA Conflicts of interest, letting contracts, and calling for bids – exceptions

[School District]

Adopted on:
Reviewed on:

1012FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Non-voted Levy for Excess IDEA Costs

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing provisions in law that allow the District to levy amounts necessary to provide FAPE to resident students with special needs.

In addition to use of a tuition levy to pay tuition for out-of-district attendance of a resident pupil, a school district may also include in its tuition levy an amount necessary to pay for the full costs of providing a free appropriate public education to any child with a disability who lives in the District. The amount of the levy imposed for the costs associated with educating each child with a disability must be limited to the actual cost of service under the child's individualized education program minus:

- (A) the student's state special education payment;
- (B) the student's federal special education payment;
- (C) the student's per-ANB amount;
- (D) the prorated portion of the district's basic entitlement for each qualifying student; and
- (E) the prorated portion of the district's general fund payments in [20-9-327](#) through [20-9-330](#) for each qualifying student.

Legal Reference:	20-5-324(5)(a)(iii), MCA	Tuition report and payment provisions
	20-9-327, MCA	Quality Educator Payment
	20-9-328, MCA	At-Risk Student Payment
	20-9-329, MCA	Indian education for all payment
	20-9-330, MCA	American Indian achievement gap payment

Adult Education

The Board of Trustees authorizes the establishment of an adult education program. The course offerings in such program may include but shall not necessarily be limited to instruction in basic skills, such as reading, writing, arithmetic, and other skills required to function in society, and/or any subject normally offered in the basic high school curricula of the school district.

Course Offerings:

Course offerings under the district’s adult education program shall include and be regularly aligned with and focused on the subjects required for graduation under policy 2410, and further aligned with the district’s curriculum and assessment requirements, and the content standards of the Board of Public Education. The Administration shall periodically compile, update and publish a list showing the corresponding course equivalency between adult education courses and the district’s high school courses required for graduation.

Enrollment Qualifications:

The Board of Trustees authorizes the enrollment of any member of the community who is 16 years of age or older who is not a regularly enrolled, full-time pupil for the purposes of ANB computation as provided in 20-7-701, MCA, including part-time pupils subject to the limitations of this section.

Eligibility for enrollment of any part-time pupil who is 16 years of age or older is subject to the Administration’s assurances that the concurrent enrollment in high school and adult education of any part-time pupil claimed as such for ANB computation is, when combined, equal to or less than the equivalent of three-quarter-time enrollment as defined in 20-9-311, MCA.

Primary Purpose 1: Credit Recovery/Improvement of Graduation Rates

A preference for enrollment in specific courses in the district’s adult education program shall be accorded to any person:

1. Who has been previously enrolled as a pupil of the district in any of the 4 academic years prior to the year for which enrollment in the district’s adult basic education program is sought;
2. Who has failed to previously earn a high school diploma; and
3. Who is seeking to enroll in any course required for graduation under policy 2410 that the person has not yet completed.

Upon the successful completion of all missing course work required for graduation by any person enrolled in the district’s adult education program under this section, and provided the person is otherwise qualified, the district shall grant such person a high school diploma in accordance with policy 2410.

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Primary Purpose 2: Post-Secondary Success and Readiness

A preference for enrollment in specific courses in the district’s adult education program shall be accorded to any person:

1. Who is at least 16 years of age but who is not yet 19 years of age;
2. Who has not yet graduated and is enrolled in the high school district on no more than a part time basis or who has graduated and has been admitted by the trustees as a part time pupil pursuant to 20-5-101(3); and
3. Who is seeking to enroll in any advance placement, dual credit or concurrent credit course offered in collaboration with the Montana university system.

Option 1 on Tuition Cost, Person Pays: Any person enrolled in adult education courses under this section shall be responsible for any third party supplemental fees charged for participation in such courses, including but not limited to tuition charged by a postsecondary institution for courses granting college credit and advanced placement test fees charged by the College Board.

Option 2 on Tuition Cost, District Pays: The district shall pay for any third party supplemental fees charged for participation in such courses, including but not limited to tuition charged by a postsecondary institution for courses granting college credit and advanced placement test fees charged by the College Board

Option 3 on Tuition Cost, District Defrays Cost: Any person enrolled in adult education courses under this section shall be responsible for the first \$100 per credit of any third party supplemental fees charged for participation in such courses, including but not limited to tuition charged by a postsecondary institution for courses granting college credit and advanced placement test fees charged by the College Board. The district shall pay for any third party costs above the first \$100 per credit.

Primary Purpose 3: Additional Offerings for the Community Aligned with Business and Economic Trends

Additional adult education offerings may be developed in collaboration with community representatives, subject to approval and authorization by the Board. Preference in the development of such additional offerings will be provided to course offerings aligned with and designed to address identified community needs for retraining and/or professional development caused by economic or other circumstances unique to the community.

Cross Reference:	Policy 2410 – 2410P	High School Graduation Requirements
Legal Reference:	§ 20-5-101(3), MCA	Admittance of child to school.
	§ 20-7-701, MCA	Definition of adult basic education and adult education.
	§ 20-9-311, MCA	Calculation of average number belonging (ANB) – 3 year averaging
	10.55.906, ARM	High School Credit

[School District]

Adopted on:
Reviewed on:

1014FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Intent to Increase Non-Voted Levy

The trustees shall adopt a resolution no later than March 31 whenever the trustees intend to impose an increase in a non-voted levy in the ensuing school fiscal year for the purposes of funding any of the funds listed below:

- a) Tuition fund under 20-5-324;
- b) Adult education fund under 20-7/705;
- c) Building reserve fund under 20-9-502 and 20-9-503;
- d) Transportation fund under 20-10-143 and 20-10-144; and
- e) Bus depreciation reserve fund under 20-10-147.

The trustees shall provide notice of intent to impose an increase in a non-voted levy for the ensuing school fiscal year by:

- a) Adopting a resolution of intent to impose an increase in a non-voted levy that includes, at a minimum, the estimated number of increased or decreased mills to be imposed and the estimated increased or decreased revenue to be raised compared to non-voted levies under a-e imposed in the current school fiscal year and, based on the district’s taxable valuation most recently certified by the department of revenue under 15-10-202, the estimated impacts of the increase or decrease on a home valued at \$100,000 and a home valued at \$200,000, and
- b) Publish a copy of the resolution in a newspaper that will give notice to the largest number of people of the district as determined by the trustees and posting a copy of the resolution to the school district’s website.

The resolution and publication of same must take place no later than March 31.

The Superintendent shall keep the trustees informed of any changes that may have occurred, which may have an effect on the estimated change in the mills and revenue, between the adoption of the resolution and the final adoption of the budget.

Legal Reference: 20-9-116, MCA Resolution of intent to increase nonvoted levy - notice

[School District]

Adopted on:
Reviewed on:
Revised on:

1014FE-F1

FLEXIBILITY AND EFFICIENCY

Notice of Intent to Impose an Increase in Levies Form

As an essential part of its budgeting process, the _____ Board of Trustees is authorized by law to impose levies to support its budget. The _____ Board of Trustees estimates the following increases/decreases in revenues and mills for the funds noted below for the next school fiscal year beginning July 1, _____, using certified taxable valuations from the current school fiscal year as provided to the district:

Fund Supported	Estimated Change in Revenues*	Estimated Change in Mills*	Estimated Impact, Home of \$100,000*	Estimated Impact, Home of \$200,000*
Adult Education	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Bus Depreciation	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Transportation	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Tuition	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Building Reserve	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Total	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease

*Impacts above are based on current certified taxable valuations from the current school fiscal year

Regarding the increase in the building reserve levy referenced above, the following are school facility maintenance projects anticipated to be completed at this time:

1. _____
2. _____
3. _____
4. _____

Legal Reference: 20-9-116, MCA Resolution of intent to increase nonvoted levy - notice