



*The Helena Public Schools educate, engage, and empower each student to maximize his or her individual potential with the knowledge, skills and character essential to being a responsible citizen and life-long learner.*

## Board of Trustees Budget and Finance Committee

February 13<sup>th</sup>, 2024 – 12:00p.m.

Lincoln Center

1325 Poplar St., Helena, MT 59601

and via TEAMS

Members of the public are able to attend remotely by clicking here:

[Click here to join the meeting](#)

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### AGENDA

- I. CALL TO ORDER / INTRODUCTIONS
- II. **GENERAL PUBLIC COMMENT:** *This is the time for comment on public matters that are not on the agenda. Public matters do not include any pending legal matters, private personnel issues or private student issues. Please do not attempt to address such issues at this time or you will be ruled out of order. The Board cannot enter into a discussion during General Public Comment.*
- III. REVIEW OF AGENDA
- IV. REVIEW OF THE 01.09.24 BUDGET AND FINANCE COMMITTEE MINUTES
- V. ITEMS FOR INFORMATION/DISCUSSION
  - A. Budget to Actual Reports
  - B. Presentation of Recommendations from Budget Consensus Committee
- VI. BOARD COMMENTS
- VII. ADJOURNMENT



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Board of Trustees  
Budget and Finance Committee  
Lincoln Campus  
And via Microsoft Teams  
Tuesday, January 9th, 2024  
12:00pm

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**MINUTES**

**ATTENDEES**

Trustees:  
Janet Armstrong, Committee Chair  
Kay Satre, Committee Member  
Terry Beaver, Committee Member  
Jeff Hindoien, Committee Member

Others:  
Rex Weltz, Superintendent  
Jane Shawn, HEA President  
Keri Mizell, Human Resources Director  
Candice Delvaux, Executive Assistant  
Barb Ridgway, Chief of Staff  
Janelle Mickelson, Business Manager  
Gary Myers, Director of Educational Technology  
Josh McKay, Assistant Superintendent  
Kaitlyn Hess, Assessment & Federal Programs  
Lona Carter, Student Health  
Joslyn Davidson, Curriculum Director  
Tim McMahon, Activities Director  
Todd Verrill, Facilities Director  
Karen Ogden, Communications Officer  
Several Guests of the Public

**I. CALL TO ORDER**

Trustee Janet Armstrong called the meeting to order at 12:01 p.m.

**II. GENERAL PUBLIC COMMENT**

There was no general public comment.

**III. REVIEW OF AGENDA**

No changes were made to the agenda.

**IV. REVIEW OF MINUTES**

The committee reviewed and approved the 12.12.23 Budget and Finance Committee Meeting Minutes.

**V. ITEMS FOR INFORMATION/DISCUSSION**

**A. Budget to Actual Reports**

Mrs. Janelle Mickelson, Business Manager and District Clerk for Helena Public Schools, reviewed the budget to actual reports for the elementary general fund and high school general fund with the Budget and Finance Committee. Mrs. Mickelson stated that we have had quite a bit of movement in secretarial positions so there are some savings there that wasn't anticipated and the same is true, particularly in the elementary, for paraprofessionals. If that trend continues, we should have a budget surplus in those areas. Mrs. Mickelson stated that we have about one to one and a half percent more of our budget remaining now than we did at this same time last year, however we have not settled negotiations yet so that number could change. Mrs. Mickelson stated everything else is trending as expected. Mrs. Mickelson stated that the Business Office is in the process of being audited by the company Wipfli LLP. The results of the audit will be presented before the full Board of Trustees at a future board meeting.

**B. Levies Discussion**

The Budget and Finance Committee had a robust conversation about levies. At the full Board of Trustees meeting this evening the trustees will be presented with the action items for the elementary trustee resolution calling for the annual regular election and the high school trustee resolution calling for the annual regular election.

Superintendent Wertz mentioned that the specific amounts for the five levies we are requesting will not be listed tonight as we are still identifying what those amounts will be, and we hope to have those amounts by February. The District will be requesting an increase in the technology mill levy for both the elementary and the high school districts for the purpose of purchasing, renting, repairing and maintaining technological equipment, including computers and computer network access, cloud computing services for technology infrastructure, platforms, software, network, storage, security, data, database, test environment curriculum, or desktop virtualization purposes, including any subscription or any license-based or pay-per-use service that is accessed over the internet or other remote network to meet the district's information technology and other needs, and the associated technical training for school district personnel. If approved, the increased levies will be for a term of 10 years and will take effect July 1, 2024, and expire June 30, 2034. In addition to the initiatives mentioned above, the District will be requesting a school and student safety and security building reserve fund levy for the purpose of planning for improvements to and maintenance of school and student safety; programs to support school and student safety and security; installing or updating security-related facility improvements; and installing or updating response systems using contemporary technologies. The District will also be requesting an operational levy for the general fund specifically.

The Budget and Finance Committee discussed that the next enrollment count will take place on Monday, February 5<sup>th</sup>. We were down around 145 students when we did the fall enrollment count. Neither the ability to run a general fund mill levy nor the amount of the levy will be known until after the spring enrollment count is finalized and the issuance of preliminary budget data sheets. However, due to the statutory requirement to call for the election no later than 70 days before the election, the recommendation is to include the general fund mill levy request in the resolution. If the Board later determines that the mill levy cannot be requested or is not desired, that portion of the election can be cancelled. Based on fall enrollment counts, the District could run an elementary levy for approximately \$143,293. Fall enrollment counts indicate that a high school levy cannot be requested.

The Budget and Finance Committee discussed the progress of the Budget Consensus Recommendation Committee. The Budget Consensus Committee is still meeting and brainstorming ideas, but there have been zero recommendations to the full Board of Trustees from the Budget Consensus Recommendation Committee thus far; those recommendations will come before the board at a future date.

## **VI. BOARD COMMENT**

Trustee Janet Armstrong stated she appreciates that the Budget Consensus Recommendation Committee is comprised of teachers, administrators, parents, and members of local businesses

and the community. Trustee Armstrong appreciates the opportunity to listen to different perspectives to see if someone has input that maybe the administration has not thought of.

Superintendent Weltz concluded the meeting by stating that Business Manager Janelle Mickelson is working on building the five-year budget forecast which will be presented to the Budget and Finance Committee at a future meeting.

**VII. ADJOURNMENT**

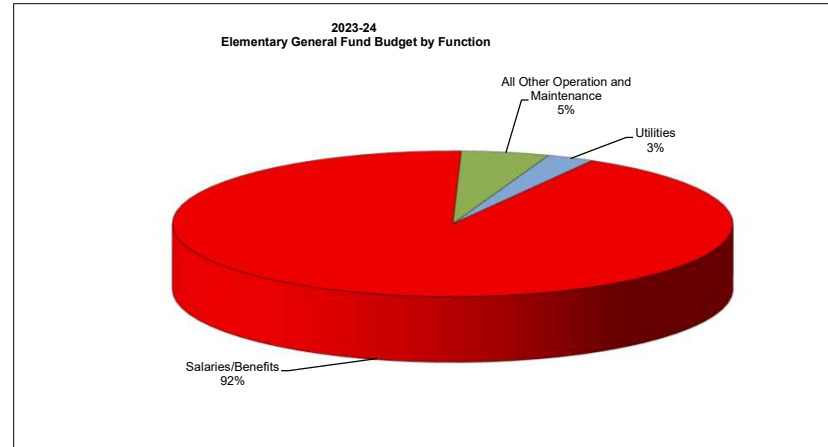
Trustee Janet Armstrong adjourned the meeting at 12:35 p.m.

**HELENA SCHOOL DISTRICT NO. 1  
FINANCIAL REPORT FOR 1/31/2024  
ELEMENTARY GENERAL FUND**

Account	Beginning	Annual Budget	Year-to-Date	Budget	% Budget
Description	Budget	(after transfers & amendments)	Expended & Encumbered	Balance	Left
Administrative Salaries	\$ 2,122,775	\$ 2,122,775	\$ 2,148,047	\$ (25,272)	-1.2%
Educator Salaries	22,835,572	22,835,572	22,794,813	\$ 40,758	0.2%
Professional Salaries	2,939,264	2,939,264	2,906,145	\$ 33,120	1.1%
Technical Salaries	1,508,154	1,508,154	1,507,455	\$ 699	0.0%
Clerical Salaries	1,301,725	1,301,725	1,203,317	\$ 98,408	7.6%
Service Worker Salaries	2,279,336	2,279,336	2,222,394	\$ 56,942	2.5%
Para Professional Salaries	3,574,971	3,574,971	2,433,581	\$ 1,141,390	31.9%
Guest Educator Salaries	500,112	500,112	251,476	\$ 248,636	49.7%
Substitute Clerical Salaries	11,750	11,750	11,864	\$ (114)	-1.0%
Substitute Service Worker	20,200	20,200	15,572	\$ 4,628	22.9%
Substitute Para Salaries	88,500	88,500	35,862	\$ 52,638	59.5%
Overtime	31,750	31,750	20,358	\$ 11,392	35.9%
Sabbatical Leave Salaries	-	-	-	\$ -	-
Coaching Salaries/Stipends	98,100	98,100	54,712	\$ 43,388	44.2%
Termination Pay	240,000	240,000	73,969	\$ 166,031	69.2%
Admin TSA Employer Match	-	-	12,140	\$ (12,140)	-
Workers' Comp/Benefits	227,600	227,600	219,162	\$ 8,438	3.7%
Crafts Benefits	30,000	30,000	23,347	\$ 6,653	22.2%
Cell phone stipends	48,652	48,652	22,613	\$ 26,039	53.5%
Contracted Services	887,116	880,074	371,167	\$ 508,907	57.8%
Gas	333,214	333,214	139,216	\$ 193,998	58.2%
Electricity	556,743	556,743	313,556	\$ 243,187	43.7%
Water	133,819	133,819	97,756	\$ 36,062	26.9%
Sewer	56,768	56,768	26,138	\$ 30,629	54.0%
Garbage	39,439	39,439	20,947	\$ 18,492	46.9%
Repair and Maintenance	42,069	42,069	41,408	\$ 661	1.6%
Rental	53,150	53,150	22,890	\$ 30,260	56.9%
Instructional Field Trips	10,550	10,550	5,276	\$ 5,274	50.0%
Liability/Other Insurance	2,500	2,500	-	\$ 2,500	100.0%
Postage	11,109	11,109	5,139	\$ 5,970	53.7%
Advertising	12,470	12,470	5,229	\$ 7,241	58.1%
Printing	164,821	160,821	69,453	\$ 91,368	56.8%
Extracurricular Team Travel	400	400	-	\$ 400	100.0%
Travel	47,540	47,540	34,294	\$ 13,246	27.9%
Professional Development/Meetings	66,653	73,695	22,524	\$ 51,171	69.4%
Supplies	668,933	670,399	272,847	\$ 397,551	59.3%
Books	46,277	46,277	36,400	\$ 9,877	21.3%
Periodicals	24,073	24,073	6,406	\$ 17,667	73.4%
Minor Equipment	47,410	47,410	4,474	\$ 42,936	90.6%
Major Equipment & Construction	-	-	-	\$ -	-
Dues and Memberships	46,665	46,665	35,161	\$ 11,504	24.7%
Contingency	4,062	6,596	-	\$ 6,596	100.0%
<b>Total Budget</b>	<b>\$ 41,114,241</b>	<b>\$ 41,114,241</b>	<b>\$ 37,487,110</b>	<b>\$ 3,627,131</b>	<b>8.8%</b>

**Budget Transfers**

From	To	Amount	Reason
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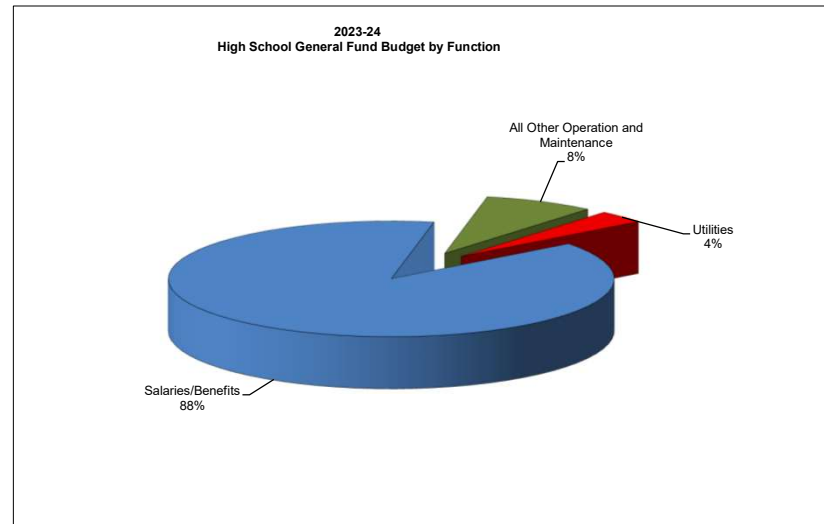


**HELENA SCHOOL DISTRICT NO. 1  
FINANCIAL REPORT FOR 1/31/2024  
HIGH SCHOOL GENERAL FUND**

Account Description	Beginning	Annual Budget	Year-to-Date Expended & Encumbered	Budget Balance	% Budget
	Budget	(after transfers)			Left
Administrative Salaries	1,174,660	1,174,660	1,174,494	166	0.0%
Educator Salaries	12,650,979	12,650,979	12,655,583	(4,604)	0.0%
Professional Salaries	1,376,800	1,376,800	1,126,629	250,172	18.2%
Technical Salaries	903,314	903,314	889,086	14,228	1.6%
Clerical Salaries	1,133,138	1,133,138	1,080,757	52,381	4.6%
Service Worker Salaries	1,016,310	1,016,310	1,004,039	12,271	1.2%
Para Professional Salaries	397,964	397,964	227,180	170,784	42.9%
Guest Educator Salaries	329,433	329,433	145,599	183,834	55.8%
Substitute Clerical Salaries	-	-	4,066	(4,066)	
Substitute Service Worker	12,800	12,800	12,293	507	4.0%
Substitute Para Salaries	4,000	4,000	2,830	1,170	29.2%
Overtime	25,500	25,500	13,812	11,688	45.8%
Sabbatical Salaries	176,127	176,127	199,672	(23,545)	-13.4%
Coaching Salaries/Stipends	588,403	588,403	441,731	146,673	24.9%
Administrator TSA Employer Match	-	-	10,460	(10,460)	
Termination Pay	240,000	240,000	19,373	220,627	91.9%
Workers' Comp/Benefits	115,257	115,257	110,993	4,263	3.7%
Crafts Benefits	16,000	16,000	11,210	4,790	29.9%
Cell phone stipends	44,532	44,532	11,791	32,741	73.5%
Contracted Services	357,777	357,777	234,100	123,677	34.6%
Gas	242,111	242,111	103,224	138,888	57.4%
Electricity	437,740	437,740	214,707	223,033	51.0%
Water	65,316	65,316	26,967	38,348	58.7%
Sewer	36,395	36,395	10,286	26,109	71.7%
Garbage	29,181	29,181	15,280	13,900	47.6%
Repair and Maintenance	28,535	28,535	19,373	9,162	32.1%
Rental	25,855	25,855	5,179	20,676	80.0%
Instructional Field Trips	7,325	7,325	7,164	160	2.2%
Liability/Other Insurance	334,215	334,215	343,112	(8,897)	-2.7%
Postage	14,698	14,698	10,370	4,328	29.4%
Advertising	10,400	10,400	2,826	7,574	72.8%
Printing	101,580	101,580	43,635	57,945	57.0%
Travel	22,562	22,562	17,567	4,994	22.1%
Professional Development/Meetings	43,360	43,360	15,130	28,230	65.1%
Extracurricular Travel	267,705	267,705	175,386	92,319	34.5%
Supplies	496,679	496,679	206,146	290,533	58.5%
Books	58,569	58,569	33,350	25,219	43.1%
Periodicals	5,258	5,258	529	4,729	89.9%
Minor Equipment	54,889	54,889	9,992	44,897	81.8%
Major Equipment	-	-	-	-	
Dues and Memberships	32,526	32,526	19,970	12,556	38.6%
Contingency	-	-	-	-	
<b>total budget</b>	<b>\$ 22,877,892</b>	<b>\$ 22,877,892</b>	<b>\$ 20,655,893</b>	<b>\$ 2,221,999</b>	<b>9.7%</b>

**Budget Transfers**

From	To	Amount	Reason
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- A. **Background Information:** In the spring of 2023, the Helena School District convened a diverse group of nearly 40 stakeholders with the purpose to examine the district budget and make recommendations for potential reductions. Based on budget forecasting, the district anticipated a budget shortfall for the 2024/25 school year. The committee met approximately 12 times from May 2023 to February 2024. Stakeholders included parents, teachers, administrators, community members, and Board members. The committee used a facilitated consensus process to make decisions.
- B. **Budget Value Statements:** The committee examined several sources of information to create “budget value statements.” The purpose of these statements was to capture goals and objectives that could be used to evaluate potential budget reduction ideas. The statements were presented to the Board of Trustees at their October meeting.

**It is the mission of Helena Public Schools to foster dynamic educational experiences that prepare all students for life. In order to succeed in this mission and support the needs of all students, the budget should allow Helena Public Schools to:**

1. Empower students with a dynamic and diverse education, foster the well-being and shared responsibility for life-long success and achievement. (Short title: student outcomes and achievement)
  2. Provide all students a well-rounded education that meets or exceeds (*or upholds*) accreditation standards in well-maintained, safe facilities that are equipped with relevant technology. (Short title: programs and environment)
  3. Build trust and support for additional funding by continuously adapting and maintaining a vibrant and well-connected community. (Short title: trust and engagement)
  4. Foster financial sustainability with a budget that is economically responsible, supported, and informed by the needs and aspirations of our community. (Short title: sustainability)
  5. Recruit and retain the highest quality staff through recognition of accomplishments, quality training, robust support, and market compensation. (Short title: staff)
- C. **Estimated Budget Forecast 2024-25 School Year:** Throughout the term that the budget committee met, participants were presented with several budget scenarios based on the most current information available. Each scenario was built on several assumptions. *The final scenario (dated January 10) shows a potential shortfall between \$660K to \$4.58M.* This range is built on several assumptions including: the outcome of HEA negotiations and the results of the spring levy elections. The numbers in the chart below will also change based on the second student enrollment count, the adjustment of the K8 operational levy as well as the potential addition of a HS operational levy.

*Estimated budget forecast, 2024-25 school year*

		UPDATED: 1/10/24	
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Helena School District, Budget Consensus Committee Recommendation, February 9, 2024

	<b>Projected Shortfall</b>		K-8 2.03M
			9-12 0.65M
			<u>Total K12 2.68M (1% 23/24 &amp; 1% 24/25)</u>
		Add 2% Salaries	1.20M (TBD, Negotiations)
		Add Insurance	0.70M (TBD, Negotiations)
		<b>Total</b>	<b>- 4.58M</b>
	<b>Potential Revenue</b>	K-8 GF Levy	0.32M (will change)
		Charter Schools	0.70M (confirmed, 1/18/24)
		Rental Revenue	0.25M (updated, 1/10/24)
		<b>Total</b>	<b>+1.27M</b>
		Safety Levy	1.65M (GF offset)
		Tech Levy	1.0M (GF offset)
		<b>Total</b>	<b>+3.92M</b>
	High Reduction	Middle Reduction	Low Reduction
	4.58M	3.31M (4.58 - 1.27)	0.66M (4.58 - 3.92)
K-5	2.02M	1.46M	0.29M
MS	0.92M	0.66M	0.13M
HS	1.65M	1.19M	0.24M

**D. Budget reduction ideas:** At the December committee meeting, the participants brainstormed several budget reduction ideas for each grade level band: K5, MS, HS. Each idea was discussed and clarified. A final list of ideas was forwarded to the administration to determine a cost estimate. Cost estimates were developed based on several assumptions, as described in the “Notes” section of the lists below.

**E. Methodology: Prioritizing Reduction Ideas**

- a. Using the Budget Value Statements, committee members evaluated each of the budget reduction ideas as they related to each budget value.
- b. Each idea was evaluated with regard to impact on (1) student outcomes and achievement (2) programs and environment (3) trust and engagement (4) financial sustainability (5) staff.
- c. For each idea, committee members rated each budget value statement on a scale of significant impact, minor impact, no impact, or positive impact.
- d. The average rating of all committee members was used to create a priority list. The items at the top of the list were rated as having minor or no impact on the

budget values. While the items at the bottom of the list were rated as having a significant impact on the budget values.

- e. It is the recommendation of the committee that the Board would use these prioritized lists when making budget decisions. The Board could consider the low impact items first (top of list) and use the significant impact items (bottom of list) only if needed to balance the budget.

**F. K5 Prioritized List: Ranked from least to most impactful**

	<b>K5 Budget Reduction Ideas</b>	<b>Est. Cost</b>	<b>Notes</b>
1	Eliminate the copy center	0\$ for 2024-2025, TBD for future	Current contract expires in 2025, costs would be shifted to building budgets in this scenario.
2	Reduce central office/department budgets by 10%	\$78K	
3	No (eliminate) cell phone stipends	\$93K	
4	Restructure PEAK program	\$224K	Current costs are \$304K. Concept is to serve student needs at their homeschool, keep 1 GT teacher
5	Eliminate iReady	\$61K	CoGat =\$9,500 Acadiane = \$8,300 iReady and MyPath = \$60,563 Curricular Assessments = \$15,000
6	Reduce "independent" positions	\$75K	Reduce position \$ allocation by 5% for k-8
7	Reduce all building discretionary budgets by 10%	\$28K	
8	Reduce custodial services	\$561K	11 FTE custodians = \$561,000
9	Close 1 K5 School or close more than 1	\$345K / Each	save 5 various FTE \$345,250
10	Reduce or eliminate field trips	\$0	Typically K5 field trips are \$42K. Currently not paid for from the general fund. Will need to find a future funding source.
11	Reduce nurses or hire LPN	\$66K / Each	Cannot recruit/hire LPN - none available. This cost is a reduction of an RN.
12	Larger class sizes.	\$759K	save 2 FTE in K = \$132, 000; save 2 FTE in 1st = \$132,000; no savings in 2nd grade; save 3 FTE in 3rd = \$198,000; save 1.5 FTE in 4th= \$99,000; save 3 FTE in 5th = \$198,000. TOTAL saved if every class went to accred max \$759,000

Helena School District, Budget Consensus Committee Recommendation, February 9, 2024

13	Rearrange insurance plan	TBD	Requires more discussion with District health insurance committee
14	Reduce instructional coaches	\$0	No impact to general fund. These positions are currently grant funded.
15	Reduce paras	\$396K	Reduce one per building, 11FTE = 396K
16	Teachers don't get raises, keep people and programs.	TBD	Determined in negotiations
17	Reduce K5 Principal FTE, by 1 or 2.	\$123K / each	Accrd Standards allow for part-time administrators. Concept would be to share admin for smaller schools.
18	Reduce the number of librarians	\$99K	0.5 FTE for 126 to 250 students in the school, 1.0 FTE for 251 to 500 students in the school. Save 1.5FTE
19	Budget cuts have to come from salaries	TBD	Determined in negotiations
20	Restructure elementary PE or Music.	\$1.0M	Those subjects taught by classroom teacher. 16 FTE, 8 PE and 8 Music
21	Reduce the number of counselors	\$119K	Accrd requires 1 Counselor per 400 students. 3478 K5 students / 400 = 8.7 FTE. Currently have 10.5 FTE
22	Reduce curriculum programs	TBD	Committee did not identify which programs. An example: New K5 Math program will cost \$300-400K
23	Reduce or consolidate special ed programs.	\$1.0M	7 self-contained classrooms, save 7 teachers, save 15 paras, total \$1,002,000
24	Fewer staff would get raises	TBD	Determined in negotiations
<b>Other K5 Items Considered, Not Ranked</b>			
	Thrifty purchases		Already happening
	Reduce or eliminate CSCT		No general fund savings
	Review properties, sell or lease		Already happening
	Recruit kids for charter schools		Already happening
	Charge student fees		May not legal, FAPE
	Change technology programs		Google would increase costs

**G. Middle School Prioritized List: Ranked from least to most impactful**

Middle School Budget Reduction Ideas	Est. Cost	Notes
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Helena School District, Budget Consensus Committee Recommendation, February 9, 2024

1	Balance boundaries between the two MS	\$121K	incrementatly shift the MS boundary to the west, goal of HMS 725-750, Save 1 Admin position, May not see a savings in 24/25.
2	Eliminate iReady	\$20K	
3	Reduce central office/department budgets by 10%	\$36K	Does not include Sped Funding
4	Reduce all building discretionary budgets by 15%	\$23K	
5	Reduce staff. Change the student/staff ratio	\$330K	current class ratio is 19 students to 1 FTE 1714/91 changing to 20 to 1 means a reduction of 5 FTE, 5 FTE for each increase in student to teacher ratio. 5 FTE = \$330,000
6	Elementary model for 6th grade (final 2 items had identical ranking)	\$376K	save 1 FTE if move cores to 30 class size in grade 6. If PE/ Music stays and other rotations are cut, then save 4.7 FTE for \$310,200 TOTAL \$376,200
6	Reduce elective offerings (final 2 items had identical ranking)	\$931K	4.7 FTE x 3 grades = 14.1 FTE reduction = \$930,600 TOTAL
	<b>Other Ideas: Not Ranked</b>		
	Four day school week.		No real GF savings.
	Retirement savings: Already built in budget		Already built in budget.
	Marketing to capture homeschool, private enrollment.		Already happening
	Increase facility rental fees		No impact to GF. Those fees go to O&M

**H. High School Prioritized List: Ranked from least to most impactful**

Rank	High School Budget Reduction Ideas	Est Cost	Notes
1	HS GF budget Admin \$ reduction	\$59K for 5%	i.e.. 5% categorical reduction. Need to determine which positions could be reduced.
2	Reduce secretaries & Independents	\$56K Sear. \$45K Indep.	i.e. 5% categorical reduction. Need to determine which positions could be reduced.
3	Reduce central office/department budgets by 15%	\$139K	Does not include Sped funding
4	Activity consolidation	\$10K	Combine some coaching positions

Helena School District, Budget Consensus Committee Recommendation, February 9, 2024

5	Share teachers across town	\$66K	When you have only enough classes for a partial teacher schedule you may be able to share it with another school and their partial needs to make a whole FTE
6	Reduce all building discretionary budgets by 15%	\$72K	TBD
7	Teach 6 out of 7, Keep 23 credits	\$1.5M	Keep a 7 period day, but each teacher would teach one extra class. We could reduce total teaching staff by 23FTE which is 1.5M. Grad requirements would stay at 23 credits as students still have an opportunity to take 7 classes each year.
8	Relocate PAL to HHS	\$300K	Item #7 would have to occur first so that there was space available at HHS to relocate PAL.
9	Reduce course offerings. Offer some classes every other year.	See #10	See #10
10	Schedule accreditation courses first, then electives	\$462 - 990K	Offering those courses required for graduation first and eliminating some electives with lower enrollment could save between 7 and 15 FTE. Also some savings by reducing counselors and administration
11	Schedule changes, block schedule, 6 period day, Teach 5 out of 6, reduce to 21 credits	\$1.5M	If students were required 21 to graduate and had a 6 period day, then we would not need as many FTE. A one seventh reduction (eliminating one class period) is 23 FTE which is \$1,518,000 saved, this equals 115 less class periods.
<b>Other Ideas: Not Ranked</b>			
	Look at boundaries.		No Savings
	4-day school week.		No real GF savings
	Assessment costs.		Currently ACT is free
	Eliminate PAL: Now a Charter School, Revenue		Now a charter, will generate new revenue

	Flip required course to senior year.		No real increase in revenue as any student who takes 4 or more is considered full time by state.
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- I. **Communication to the Board from the Committee:** The following is a collective statement from the HSD Budget Consensus Committee to the HSD Board of Trustees. These statements were collected from committee members during their final meeting on February 7, 2024.

- a. Prompt: *What would you like the Board to know about the committee?*

We worked hard and took the job seriously. The committee was diverse and represented many stakeholders. It was a good cross-section with all dedicated to schools. The diversity of the group was good. The committee was diverse, large, knowledgeable, curious, respectful, invested, intentional, and student centered.

We lost members as time went by, but we were inclusive about others joining. Attendance on the committee was varied. Inconsistent attendance made it a little difficult to have equal representation. We saw some attrition over time. It was difficult to incorporate some who joined after 4-5 meetings into the process, but all were heard.

The committee was representative of diverse stakeholders. We were respectful of others and their ideas. This was a very diverse group - parents, teachers, and community members. It was hard work to do, no one wants to make cuts. We remained very committed to students. The members of the committee should be commended for their time and willingness to participate in addressing the districts' challenge.

- b. Prompt: *What would you like the Board to know about the process?*

The process was new for most. We went slow to go fast. Although frustrating, we acknowledge the process was slow in order to build trust and engagement to have frank conversations. The process was lengthy but positive. It was laborious, slow paced, humanistic, educational, and useful to get the end result. We worked intentionally to find solutions. The process allowed for reflection, perspective, and education. The process was fair, in-depth and extensive. The process led to a better understanding of why we need technology and safety levies. We considered all possibilities in good faith. No options were discarded.

- c. Prompt: *What would you like the Board to know about the prioritized lists?*

There were assumptions made when creating the low, middle and high scenarios. Specificity is still needed on the list items, some compromises still need to be fleshed out. The lists were very difficult to make.

We tried to stick to the budget values. We used a methodology and tried to be consistent. We tried to evaluate all logically, based on the bottom line and on our

value statements. The lists represent all ideas. It is easy to be “general” for the decisions to make cuts, however we know the decisions are not general as they are personal and involve people. Every bullet point has people behind it. Someone will be affected by each decision and option.

The ideas were ranked in the best interest of our students. All the cuts will have an impact. Equal cuts doesn’t necessarily mean equal impact. We tried to minimize student impact as much as possible. We have quality people and quality programs, which makes the cuts painful.

- d. Prompt: *Any other advice for the Board in the decision making process?*  
Reducing building or department budgets can result in passing on costs to students and families, something that should be avoided. Carefully consider the ripple effect of the decisions.  
Weigh the good to the whole system - greater than the bad to the individual.  
Follow the value statements. The budget value statements should be your guide.  
Since this was a student first process, make this a student first decision.

Communicate to all stakeholders.

Decide soon about levies. Create direction for central administration regarding cuts. The decision is a “business decision” and needs to be made. We have a desire to see the Board act on the list. We are committed to a balanced budget with necessary cuts. Please don’t be afraid of the hard decisions.

We, as a group, are frustrated with the MT state education funding model. We need long-term solutions and advocacy at the state level.

Respectfully submitted for consideration on February 9, 2024  
Rob Watson  
Budget Consensus Committee Facilitator