



*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

November 12, 2024 – 12:00 p.m.

Lincoln Center

1325 Poplar St., Helena, MT 59601

and via TEAMS

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

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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 10.08.24 BUDGET AND FINANCE COMMITTEE MINUTES
- V. ITEMS FOR INFORMATION/DISCUSSION
  - A. Budget to Actual Reports
  - B. Interlocal Fund Financial Activity
  - C. Fall Enrollment 2024/2025 Update
  - D. Preliminary General Fund Projections Based on Fall Count
- VI. BOARD COMMENTS
- VII. ADJOURNMENT



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**Board of Trustees  
Budget and Finance Committee**

Lincoln Center

And via Microsoft Teams

Tuesday, October 8<sup>th</sup>, 2024

12:00pm

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**MINUTES**

**ATTENDEES**

**Trustees:**

Janet Armstrong, Committee Chair  
Linda Cleatus, Committee Member

**Others:**

Barb Ridgway, Chief of Staff  
Jane Shawn, HEA President  
Keri Mizell, Human Resources Director  
Rex Weltz, Superintendent  
Candice Delvaux, Executive Assistant  
Gary Myers, Director of Educational Technology  
Janelle Mickelson, Business Manager  
Lona Carter, Student Health  
Karen Ogden, Communications Officer  
Josh McKay, Assistant Superintendent  
Tim McMahon, Activities Director  
JoVonne Wagner, Montana Free Press  
Hanna Warhank, Guest of the Public

**I. CALL TO ORDER/INTRODUCTIONS**

The meeting was called to order at 12:04 p.m. by Budget and Finance Committee Chair Janet Armstrong. Following the call to order, members of the Budget and Finance Committee and other attendees introduced themselves.

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 accepted the 9.10.24 Budget and Finance Committee Meeting Minutes.

V. **ITEMS FOR INFORMATION/DISCUSSION**

**A. Budget to Actual Reports**

Mrs. Mickelson, Business Manager, 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 there has been little change since last month but she anticipates higher expenditures in educator salaries due to the decision to bring back staff after realizing previous cuts were excessive. Superintendent Weltz noted that while reductions are made on paper, adjustments are necessary once the system is operational. This reflects a typical business practice of testing and adjusting based on real-world performance. The anticipated increase in expenditures is estimated to be around \$200,000 and despite the adjustments, the district is currently trending well. The Budget and Finance Committee moved on to review the interlocal fund financial activity report.

**B. Interlocal Fund Financial Activity**

Mrs. Mickelson reviewed the interlocal fund financial activity report with the committee. The report has three different categories with a beginning and end fund balance for: district wide, buildings, and departments. The beginning fund balance district-wide was around \$6,000,000 and Mrs. Mickelson anticipates at the end of the school year that balance will be reduced to around \$4,000,000. That money will be spent on operations throughout the year on items such as: termination pay, technology supplies, curriculum, assessments, property and liability insurance, contract services, CSCT, Driver's Ed, Supplies, and professional development. The committee had a robust discussion about property and liability insurance which

increased by 16% this year. Trustee Armstrong inquired as to whether the devastation (hurricanes) that are happening right now on the East Coast will cause an increase in our rates, which Mrs. Mickelson stated she did not know, but she would find out through our insurance company. The Budget and Finance Committee moved on to review a potential technology levy proposal.

### **C. Potential Technology Levy Proposal**

Superintendent Weltz addressed the committee regarding the recent failed levies, acknowledging the community's concerns about the financial burden. Despite this setback, the need for funding has increased, particularly for technology, which remains a pressing issue in the district. The superintendent proposed reintroducing a 10-year technology levy in May of 2025 that will be less burdensome for taxpayers and Mr. Gary Myers, Director of Educational Technology, presented additional information to the committee regarding the proposed levy. Mr. Myers highlighted the need for increased funding for technology in the district, contrasting current expenditures with the original technology levy passed in 2004. Currently, the district allocates approximately \$1.9 million for technology, while full funding needs are estimated at nearly \$3.5 million. This funding is necessary not for extravagant expenses, but for essential replacements and staffing for repairs. The current levy provides about \$1.1 million, leading to an impact on interlocal funding of approximately \$900,000. If all technology needs were met, this impact would rise to around \$2.4 million. Mr. Myers emphasized the importance of effectively communicating these needs to the community in anticipation of a proposed new levy, ensuring clarity about the district's technology funding situation.

Mr. Myers discussed the technology budget and stated that key areas heavily impacted by funding constraints include licensing services, which are essential and cannot be significantly reduced. Staffing also poses challenges; a position was cut a year and a half ago, and further reductions would hinder the ability to repair devices effectively. Mr. Myers pointed out critical funding gaps in device replacement and infrastructure improvements. Annual spending of around \$800,000 is needed for replacing Chromebooks and teacher laptops, as well as for network upgrades like wiring and switches. Without consistent annual funding, the district risks facing large expenditures every few years—potentially \$5 million for wiring upgrades across elementary schools or \$2-3 million for device replacements. This approach is inefficient and complicates long-term budget planning.

Mr. Myers introduced the concept of the "device cliff," highlighting concerns about the aging technology in the district. During COVID, the district utilized ESSER and emergency connectivity funds to purchase a significant number of Chromebooks and teacher devices, resulting in a temporary surplus. However, as the pandemic recedes, many of these devices are now three to five years old, which is considered a long lifespan for student technology. Mr. Myers noted that devices have faced substantial wear and tear, especially as they were frequently sent home with students. While most students take care of their devices, the impact of frequent use is evident. Teacher laptops, many of which are six to seven years old, are becoming inefficient due to insufficient memory, affecting their usability in the classroom. Mr. Myers expressed concern about the lack of funding for necessary device replacements, emphasizing that this issue is a significant worry for the future of the district's technology infrastructure.

Mr. Myers discussed that the proposed 10-year technology levy for the elementary will be around \$2,711,000 and the existing levy is \$520,500 for an increase of \$2,190,500. In the high school the proposed 10 year technology levy will be \$1,442,000 and the existing levy is at \$559,500 for an increase of \$882,500. The total proposed 10-year levy increase will be around 17.22 mills in the elementary, and 8.38 in the high school. For a \$100,000 house it will be an increase of \$23.25 a year for the elementary, a \$69.74 yearly increase for a \$300,000 house, and a yearly increase of \$139.48 for a \$600,000 house. In the high school for a \$100,000 house, it will be a yearly increase of \$11.31, for a \$300,000 house it will be a yearly increase of \$33.94, and for a \$600,000 house it will be a yearly increase of \$67.88.

Mr. Myers shared election results and informal election feedback from the most recent levy and stated that only 1,200 additional votes would have been needed for the levy to pass. Some of the informal feedback included concerns about the property tax burden, the overall high cost of the previous levy compared to other AA districts, and the nature of the safety and security levy as a permanent request. Additionally, there were sentiments expressed about the expectation for state-level funding for certain needs. Mr. Myers emphasized the importance of giving the community an opportunity to support the district's funding needs while recognizing the challenges ahead in garnering that support.

Trustee Janet Armstrong asked Mr. Myers to paint the picture of what it looks like in our classrooms for our students when we cannot keep up with replacing Chromebooks. Mr. Myers explained that currently, there is approximately one device for every two students in elementary schools. This scarcity necessitates a strict

scheduling system for state-mandated assessments, which disrupts classroom activities and increases planning demands on teachers. Furthermore, accessing the online components of the curriculum and conducting digital assessments has become more complicated, leading to difficulties in lesson delivery.

**VI. BOARD COMMENTS**

The trustees thanked Mr. Myers for his presentation on the potential technology levy.

**VII. ADJOURNMENT**

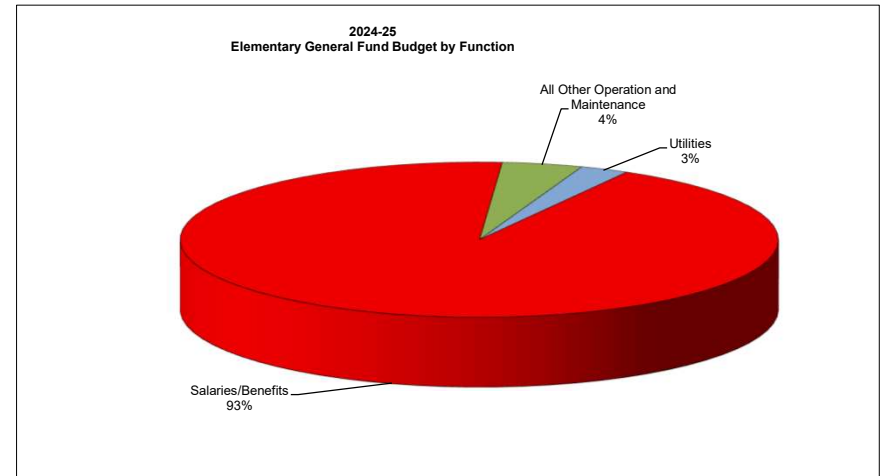
Budget and Finance Committee Chair Janet Armstrong adjourned the meeting at 12:39 p.m.

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

Account Description	Beginning	Annual Budget (after transfers & amendments)	Year-to-Date Expended & Encumbered	Budget	% Budget
	Budget			Balance	Left
Administrative Salaries	\$ 2,133,035	\$ 2,133,035	\$ 2,036,232	\$ 96,803	4.5%
Educator Salaries	24,316,760	24,316,760	23,051,212	1,265,547	5.2%
Professional Salaries	2,868,976	2,868,976	3,087,535	(218,559)	-7.6%
Technical Salaries	1,422,026	1,422,026	1,347,966	74,060	5.2%
Clerical Salaries	1,302,058	1,302,058	1,157,133	144,925	11.1%
Service Worker Salaries	2,430,857	2,430,857	2,157,432	273,425	11.2%
Para Professional Salaries	2,748,600	2,748,600	1,932,998	815,602	29.7%
Guest Educator Salaries	510,606	510,606	71,985	438,621	85.9%
Substitute Clerical Salaries	15,300	15,300	10,121	5,179	33.8%
Substitute Service Worker	20,200	20,200	9,245	10,955	54.2%
Substitute Para Salaries	88,500	88,500	19,162	69,338	78.3%
Overtime	31,750	31,750	8,918	22,832	71.9%
Sabbatical Leave Salaries	-	-	-	-	-
Coaching Salaries/Stipends	98,660	98,660	35,130	63,530	64.4%
Termination Pay	500,000	500,000	54,030	445,970	89.2%
Admin TSA Employer Match	-	-	-	-	-
Workers' Comp/Benefits	229,273	229,273	208,754	20,519	8.9%
Crafts Benefits	35,000	35,000	17,799	17,201	49.1%
Cell phone stipends	24,438	24,438	44,545	(20,107)	-82.3%
Contracted Services	870,865	870,865	151,020	719,844	82.7%
Gas	301,712	301,712	20,473	281,239	93.2%
Electricity	586,130	586,130	101,460	484,670	82.7%
Water	125,832	125,832	75,059	50,773	40.3%
Sewer	44,417	44,417	15,989	28,427	64.0%
Garbage	45,046	45,046	12,764	32,282	71.7%
Repair and Maintenance	31,419	31,419	22,904	8,515	27.1%
Rental	25,650	25,650	15,326	10,324	40.2%
Instructional Field Trips	8,091	8,091	503	7,588	93.8%
Liability/Other Insurance	-	-	-	-	-
Postage	10,555	10,555	628	9,927	94.1%
Advertising	9,678	9,678	210	9,468	97.8%
Printing	131,436	131,436	56,450	74,986	57.1%
Extracurricular Team Travel	-	-	145	(145)	-
Travel	45,298	45,298	33,048	12,251	27.0%
Professional Development/Meetings	71,880	71,880	11,830	60,050	83.5%
Supplies	514,096	514,096	101,989	412,107	80.2%
Books	42,625	42,625	12,097	30,528	71.6%
Periodicals	21,873	21,873	6,537	15,336	70.1%
Minor Equipment	31,458	31,458	13,077	18,381	58.4%
Major Equipment & Construction	-	-	-	-	-
Dues and Memberships	51,598	51,598	39,574	12,024	23.3%
Sick Leave/Personal Leave Payoff	162,590	162,590	3,375	159,215	97.9%
<b>Total Budget</b>	<b>\$ 41,908,288</b>	<b>\$ 41,908,288</b>	<b>35,944,657</b>	<b>\$ 5,963,631</b>	<b>14.2%</b>

Budget Transfers

From	To	Amount	Reason
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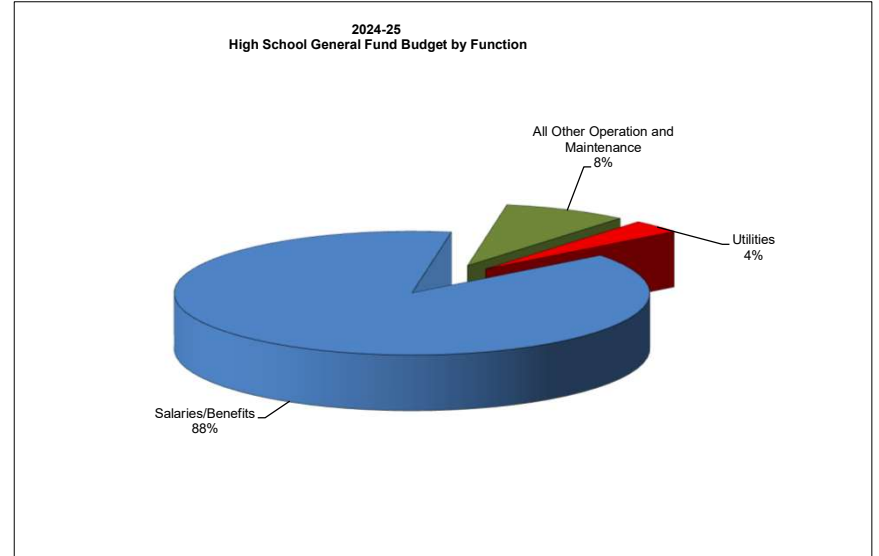


**HELENA SCHOOL DISTRICT NO. 1  
FINANCIAL REPORT FOR OCTOBER 2024  
HIGH SCHOOL GENERAL FUND**

Account	Beginning	Annual Budget	Year-to-Date Expended & Encumbered	Budget Balance	% Budget Left
Description	Budget	(after transfers)	Encumbered	Balance	Left
Administrative Salaries	1,278,840	1,278,840	1,291,364	(12,524)	-1.0%
Educator Salaries	12,879,352	12,879,352	12,312,110	567,242	4.4%
Professional Salaries	1,106,895	1,106,895	1,156,945	(50,050)	-4.5%
Technical Salaries	890,435	890,435	897,598	(7,162)	-0.8%
Clerical Salaries	1,054,429	1,054,429	1,016,830	37,599	3.6%
Service Worker Salaries	1,166,009	1,166,009	906,618	259,390	22.2%
Para Professional Salaries	392,516	392,516	297,551	94,965	24.2%
Guest Educator Salaries	324,226	324,226	73,683	250,542	77.3%
Substitute Clerical Salaries	4,000	4,000	2,420	1,580	
Substitutue Service Worker	11,520	11,520	4,438	7,082	61.5%
Substitute Para Salaries	4,000	4,000	177	3,823	95.6%
Overtime	24,750	24,750	4,812	19,938	80.6%
Sabbatical Salaries	46,444	46,444	57,679	(11,235)	-24.2%
Coaching Salaries/Stipends	604,680	604,680	467,190	137,490	22.7%
Adminstrator TSA Employer Match	-	-	-	-	
Termination Pay	500,000	500,000	6,371	493,629	98.7%
Workers' Comp/Benefits	120,333	120,333	105,251	15,082	12.5%
Crafts Benefits	16,000	16,000	8,084	7,916	49.5%
Cell phone stipends	12,396	12,396	20,280	(7,885)	-63.6%
Contracted Services	284,814	284,814	99,518	185,296	65.1%
Gas	236,949	236,949	24,435	212,514	89.7%
Electricity	426,040	426,040	113,747	312,293	73.3%
Water	67,198	67,198	25,365	41,833	62.3%
Sewer	32,139	32,139	4,813	27,325	85.0%
Garbage	48,942	48,942	8,036	40,906	83.6%
Repair and Maintenance	30,808	30,808	10,391	20,417	66.3%
Rental	19,868	19,868	1,929	17,939	90.3%
Instructional Field Trips	4,026	4,026	837	3,189	79.2%
Liability/Other Insurance	373,023	373,023	-	373,023	100.0%
Postage	7,351	7,351	3,251	4,100	55.8%
Advertising	8,450	8,450	78	8,372	99.1%
Printing	41,638	41,638	43,977	(2,339)	-5.6%
Travel	22,660	22,660	18,996	3,664	16.2%
Professional Development/Meetings	47,945	47,945	6,150	41,796	87.2%
Extracurricular Travel	268,155	268,155	27,600	240,555	89.7%
Supplies	679,448	679,448	120,038	559,409	82.3%
Books	22,681	22,681	10,124	12,557	55.4%
Periodicals	4,680	4,680	3,515	1,165	24.9%
Minor Equipment	96,469	96,469	9,716	86,753	89.9%
Major Equipment	-	-	-	-	
Dues and Memberships	80,558	80,558	16,621	63,937	79.4%
Sick Leave/Personal Leave Payoff	58,968	58,968	-	58,968	
<b>total budget</b>	<b>\$ 23,299,632</b>	<b>\$ 23,299,632</b>	<b>\$ 19,178,538</b>	<b>\$ 4,121,095</b>	<b>17.7%</b>

**Budget Transfers**

From	To	Amount	Reason
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## INTERLOCAL FUND FINANCIAL ACTIVITY

	<u>District-wide</u>
	<u>7.1.2024</u>
Beginning Fund Balance	\$5,999,857
Adjustment	
Interest Revenue	\$43,386
Miscellaneous Other Revenue	
Expenditures & Encumbrances:	
Termination Pay	
Technology Supplies	(\$325,107)
Curriculum	(\$284,370)
Assessments	
Property & Liability Insurance	(\$1,185,361)
Contracted Services	(\$184,564)
CSCT	(\$128,406)
Driver's Ed	
Supplies	(\$665)
Professional Development	(\$1,185)
Ending Fund Balance	<u>\$3,933,586</u>

	<u>Buildings</u>
	<u>7.1.2024</u>
Beginning Fund Balance	\$437,903
Adjustment	
Interest Revenue	\$3,411
Miscellaneous Revenue	
Expenditures & Encumbrances	(\$50,409)
Ending Fund Balance	<u>\$390,905</u>

	<u>Departments</u>
	<u>7.1.2024</u>
Beginning Fund Balance	\$638,821
Adjustment	
Interest Revenue	\$5,700
Miscellaneous Revenue	
Expenditures & Encumbrances:	
Activities/Athletics	(\$5,557)
Special Education	(\$1,583)
Ending Fund Balance	<u>\$637,380</u>

**Age Pyramid for Lewis and Clark County 2024**

Population Projection
2021
COMMERCE
Regional Economic Models Incorporated (REMI) data vintage year

Trend
Age Pyramid
Change Map
Table

Population Projection - Age Pyramids

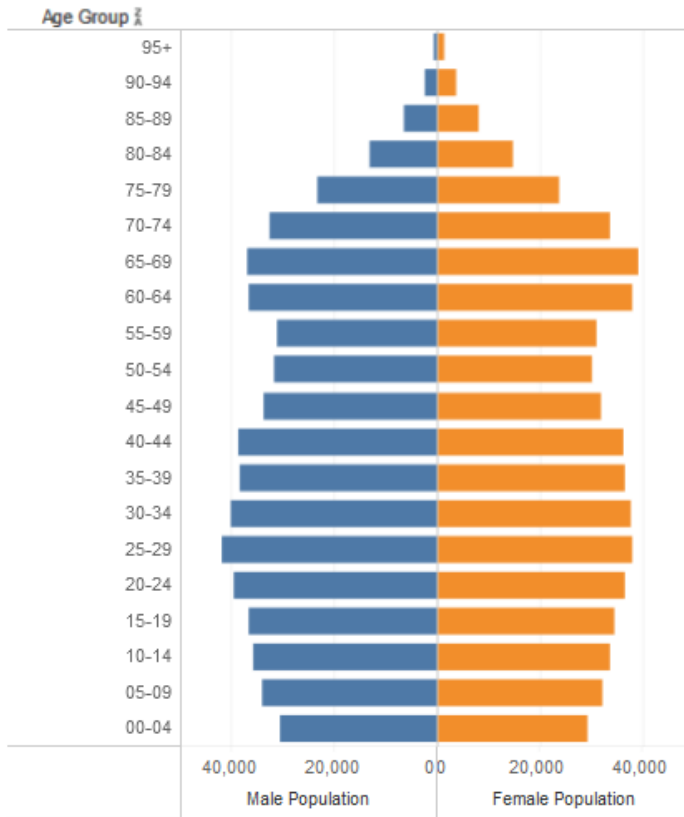
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Select Races

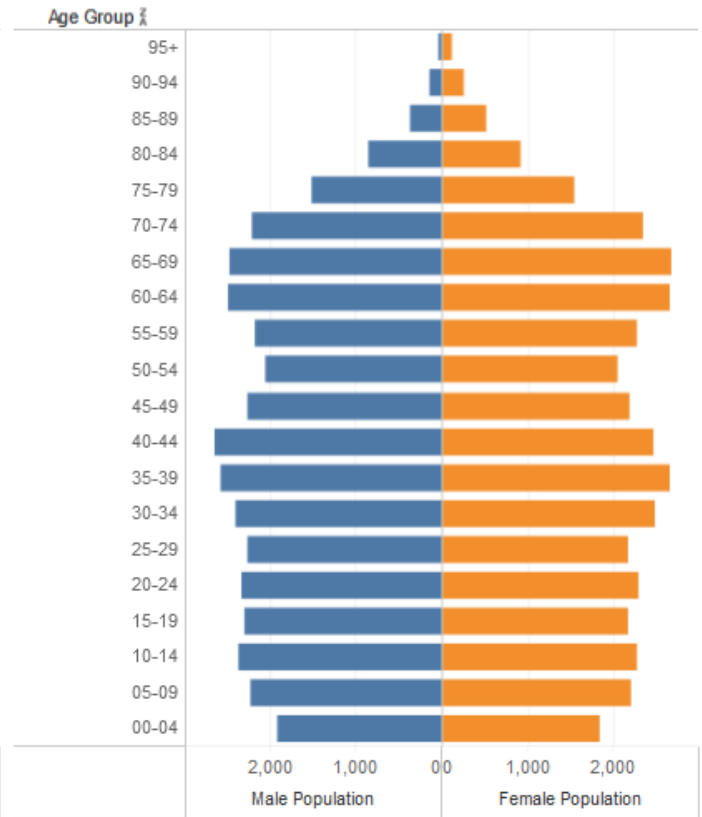
Select a County

Age pyramids show the distribution of population by age group and gender. Explore the distribution of population change over time by scrolling through years.

State of Montana - 2024



Lewis and Clark County - 2024



Data Source: eRemi Montana State and County Population Projection by Gender, Race and Age from Regional Economic Models Incorporated (REMI) compiled by Montana Department of Commerce.

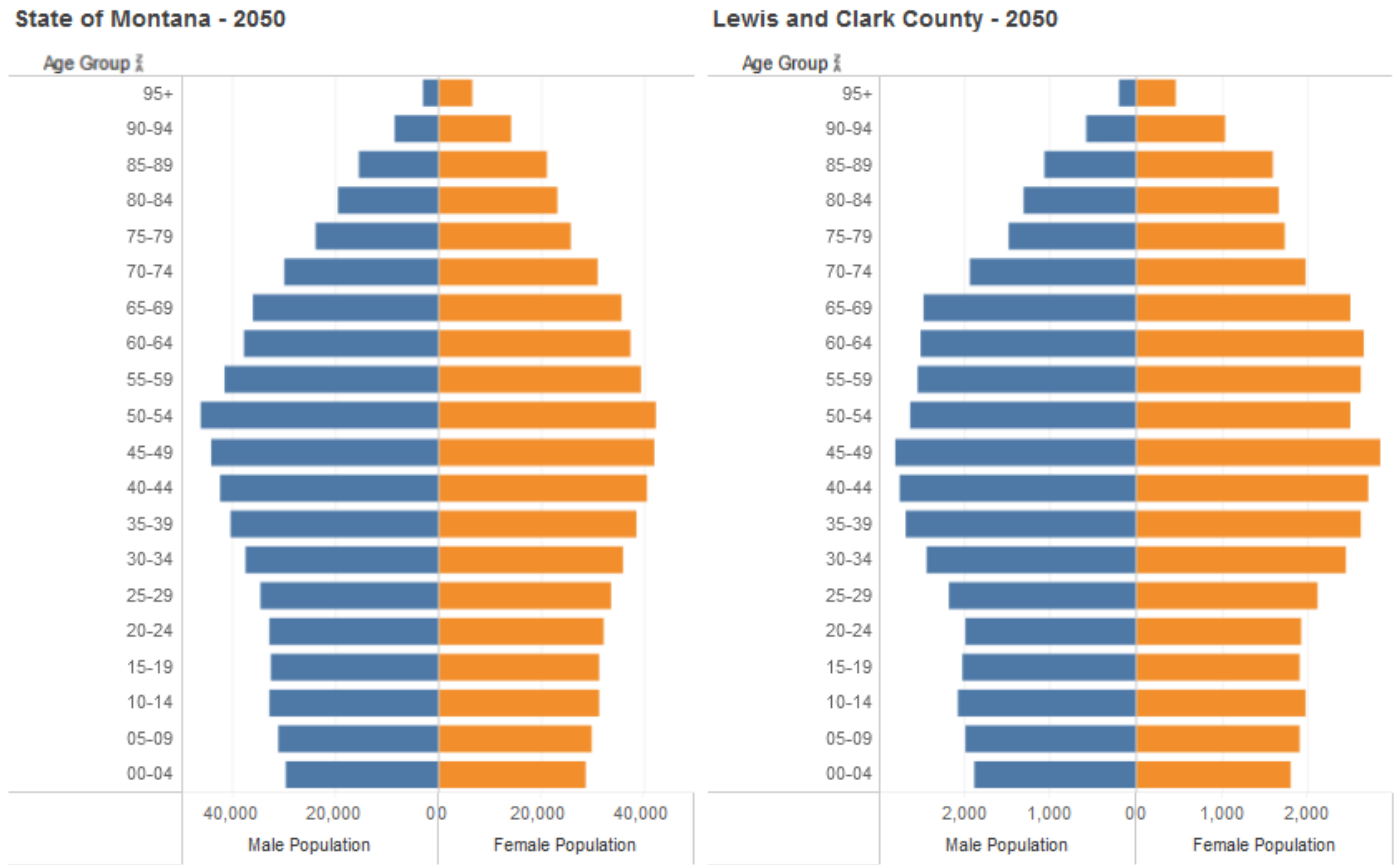
**Age Pyramid for Lewis and Clark County 2050**

**Population Projection** **2021**  
data vintage year  
 Regional Economic Models Incorporated (REMI)  **COMMERCE**

**Trend** | **Age Pyramid** | **Change Map** | **Table**

**Population Projection - Age Pyramids**

Age pyramids show the distribution of population by age group and gender. Explore the distribution of population change over time by scrolling through years.



**Trend for Lewis and Clark County: 5 year olds: through Year 2040**

**Population Projection**  
 Regional Economic Models Incorporated (REMI) **2021**  
data vintage year

 **COMMERCE**

- Trend
- Age Pyramid
- Change Map
- Table

**Population Projection - Trends**

Adjust the figures below by selecting a custom age range, gender and race. Select one or more counties to display in the county figures.

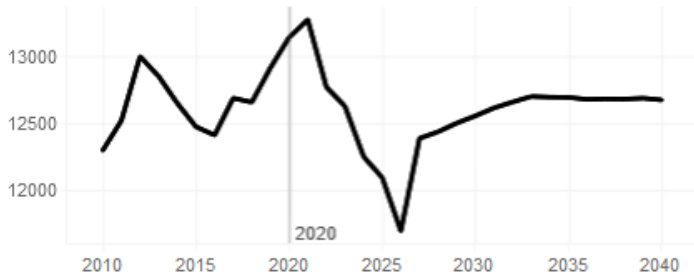
Select State and Counties: Lewis and Clark

Select Age Range: 5 5

Select Genders: (All)

Select Races: (All)

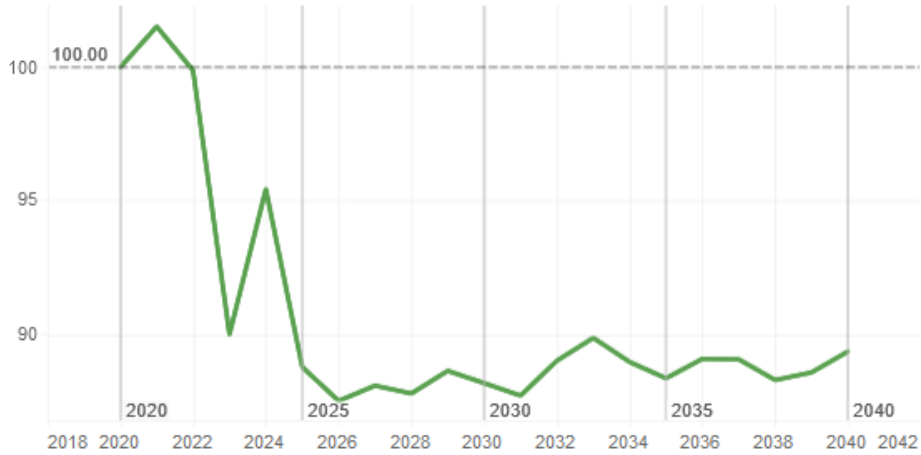
Projected Population Total for State of Montana



Projected Population Total for Selected Counties



Change in Projected Population from 2020 (index)



Projected population change is indexed to the data release year of 2020. Indexing the rate of change enables the comparison of data with different magnitudes.

■ Lewis and Clark

Data Source: eRemi Montana State and County Population Projection by Gender, Race and Age from Regional Economic Models Incorporated (REMI) compiled by Montana Department of Commerce.

**Trend for Lewis and Clark County: 5 to 18 year olds: through Year 2040**

**Population Projection** **2021**  
data vintage year  
 Regional Economic Models Incorporated (REMI)  **COMMERCE**

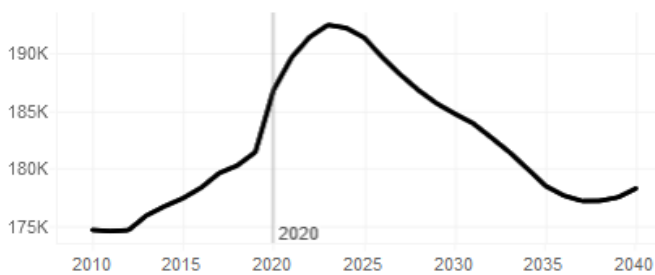
- Trend
- Age Pyramid
- Change Map
- Table

**Population Projection - Trends**

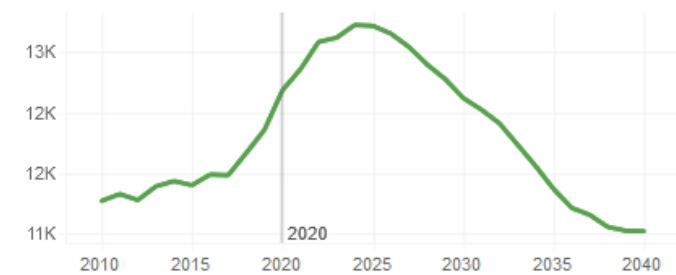
Adjust the figures below by selecting a custom age range, gender and race. Select one or more counties to display in the county figures.

Select State and Counties: Lewis and Clark | Select Age Range: 5 - 18 | Select Genders: (All) | Select Races: (All)

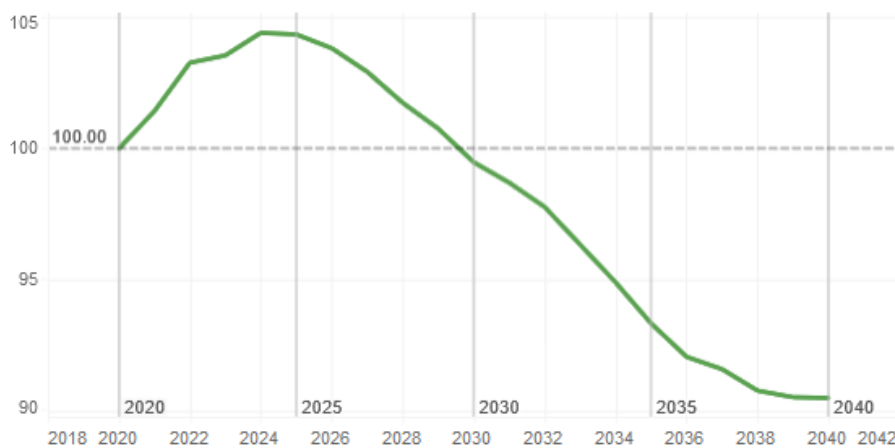
Projected Population Total for State of Montana



Projected Population Total for Selected Counties



Change in Projected Population from 2020 (index)



Projected population change is indexed to the data release year of 2020. Indexing the rate of change enables the comparison of data with different magnitudes.

■ Lewis and Clark

Data Source: eRemi Montana State and County Population Projection by Gender, Race and Age from Regional Economic Models Incorporated (REMI) compiled by Montana Department of Commerce.

**Trend for Lewis and Clark County: 5 to 100 year olds: through Year 2040**

Population Projection
2021
data vintage year
COMMERCE

Trend
Age Pyramid
Change Map
Table

**Population Projection - Trends**

Adjust the figures below by selecting a custom age range, gender and race. Select one or more counties to display in the county figures.

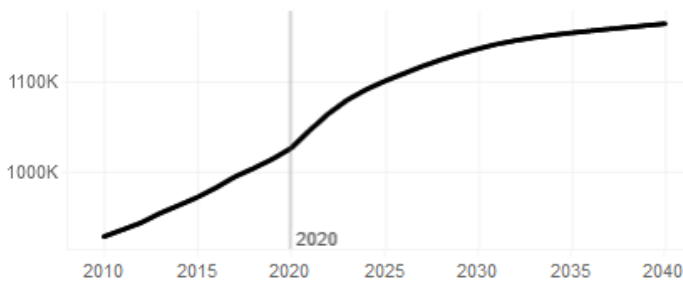
Select State and Counties 5 ▼  
 Lewis and Clark ▼

Select Age Range  
 5 
○
○
 100

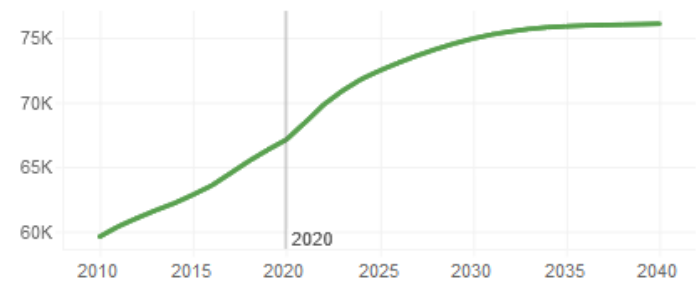
Select Genders  
 (All) ▼

Select Races  
 (All) ▼

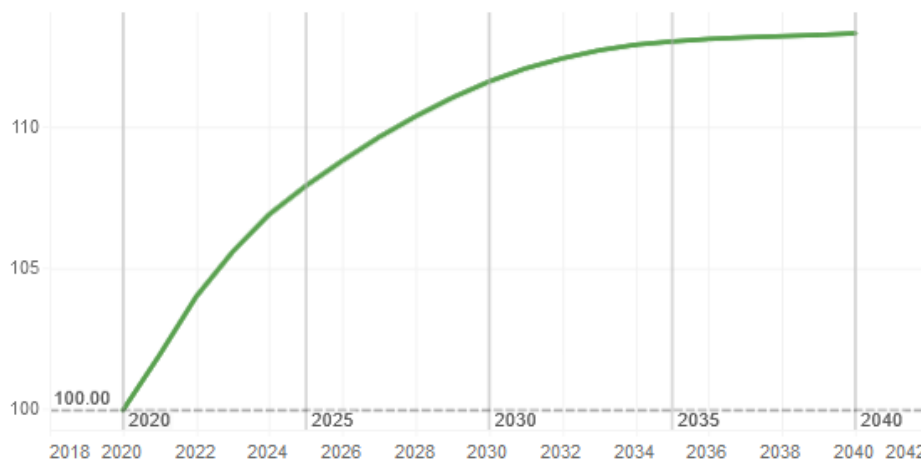
Projected Population Total for State of Montana



Projected Population Total for Selected Counties



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■ Lewis and Clark

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Montana Population  
 Projections  
 Department of Commerce Population  
 Website

<https://commerce.mt.gov/Data-Research/Research/People-Housing/Population>

Lewis and Clark County Trend for 5 year olds

<b>Year</b>	<b>Count of Children</b>	<b>Count Change</b>	<b>Percent Change</b>	<b>Average 2025 to 2040</b>
2020	878			
2021	891	13	1.5%	
2022	877	-14	-1.6%	
2023	790	-87	-9.9%	
2024	838	48	6.1%	
2025	779	-59	-7.0%	
2026	768	-11	-1.4%	
2027	773	5	0.7%	
2028	771	-2	-0.3%	
2029	778	7	0.9%	
2030	774	-4	-0.5%	
2031	770	-4	-0.5%	
2032	782	12	1.6%	
2033	789	7	0.9%	
2034	781	-8	-1.0%	
2035	776	-5	-0.6%	
2036	782	6	0.8%	
2037	782	0	0.0%	
2038	775	-7	-0.9%	
2039	778	3	0.4%	
2040	785	7	0.9%	778

Projections: Fall Student Enrollment Summary

Chart includes students with partial enrollments.

This is not an ANB count.

Updated October 7, 2024 with Projections

	Past	Past	Past	Past	Past	CURRENT
Grade level	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023	Fall 2024
*ELTI						47
Kindergarten	597	529	604	535	522	501
First Grade	585	571	559	664	536	528
Second Grade	545	563	587	574	653	528
Third Grade	600	525	562	600	583	657
Fourth Grade	578	588	524	589	598	579
Fifth Grade	609	560	593	559	586	587
Sixth Grade	652	617	564	602	558	577
Seventh Grade	579	629	611	564	592	552
Eighth Grade	555	575	621	611	564	597
Ninth Grade	648	616	644	664	646	598
Tenth Grade	711	640	630	647	648	629
Eleventh Grade	719	691	588	635	620	622
Twelfth Grade	620	682	607	573	567	567

Total Enrollment	7998	7786	7694	7817	7673	7569
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TOTALS

	Fall 2019	Fall 2020	Fall 2021	Fall 2022	Fall 2023	Fall 2024
Grades pK to 5	3514	3336	3429	3521	3478	3427
Grades 6 to 8	1786	1821	1796	1777	1714	1726
Grades 9 to 12	2698	2629	2469	2519	2481	2416
Totals	7998	7786	7694	7817	7673	7569

Projection Notes:

- \*Fall of 2022 signifies the first year of full East Helena High School implementation for all grade levels. (not with HSD)
- \*Projections do not take into consideration population growth factors
- \*Projections follow patterns from the previous enrollment year
- \*Projections estimate 505 student incoming Kindergarten classes
- \*High School Projections consider out of boundary typical requests (+40 Grade 9)
- \*High School Projections consider class to class shrinkage (-10,-10,-20)



Part 2

Projections: Fall Student Enrollment Summary

Chart includes students with partial enrollments.

This is not an ANB count.

Updated October 7, 2024 with Projections

Grade level	CURRENT	Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
	Fall 2024	Fall 2025	Fall 2026	Fall 2027	Fall 2028	Fall 2029	Fall 2030	Fall 2031	Fall 2032
*ELTI	47	50	50	50	50	50	50	50	50
Kindergarten	501	505	505	505	505	505	505	505	505
First Grade	528	501	505	505	505	505	505	505	505
Second Grade	528	528	528	522	505	505	505	505	505
Third Grade	657	657	528	536	522	505	505	505	505
Fourth Grade	579	579	657	653	536	522	505	505	505
Fifth Grade	587	587	579	583	653	536	522	505	505
Sixth Grade	577	577	587	598	583	653	536	522	505
Seventh Grade	552	552	577	586	598	583	653	536	522
Eighth Grade	597	637	592	617	626	638	623	693	576
Ninth Grade	598	588	627	582	607	616	628	613	683
Tenth Grade	629	619	578	617	572	597	606	618	603
Eleventh Grade	622	602	599	558	597	552	577	586	598
Twelfth Grade	567								
Total Enrollment	7569	7510	7413	7417	7364	7272	7225	7153	7072

TOTALS		Projected	Projected	Projected	Projected	Projected	Projected	Projected	Projected
	Fall 2024	Fall 2025	Fall 2026	Fall 2027	Fall 2028	Fall 2029	Fall 2030	Fall 2031	Fall 2032
Grades pK to 5	3427	3348	3274	3276	3128	3097	3080	3080	3080
Grades 6 to 8	1726	1716	1743	1767	1834	1772	1711	1563	1532
Grades 9 to 12	2416	2446	2396	2374	2402	2403	2434	2510	2460
Totals	7569	7510	7413	7417	7364	7272	7225	7153	7072

Projection Notes:

- \*Fall of 2022 signifies the first year of full East Helena High School implementation for all grade levels. (not with HSD)
- \*Projections do not take into consideration population growth factors
- \*Projections follow patterns from the previous enrollment year
- \*Projections estimate 505 student incoming Kindergarten classes
- \*High School Projections consider out of boundary typical requests (+40 Grade 9)
- \*High School Projections consider class to class shrinkage (-10,-10,-20)

**Enrollment by Site: 10/7/2024**

Site	Fall 2024	Fall 2023	Difference
	Site Totals	Site Totals	Fall 2024 minus FALL 2023
Broadwater**	267	246	21
Four Georgians	469	452	17
Hawthorne	181	207	-26
Jim Darcy	468	477	-9
Kessler	235	242	-7
Rossiter*	367	366	1
Bryant*	282	328	-46
Central**	316	279	37
Jefferson	243	242	1
Smith**	276	284	-8
Warren	274	305	-31
Mount Ascension pK-5	49***	50****	-1
CRA	968	1016	-48
HMS	705	671	34
Mount Ascension 6-8	53***	27****	26
CHS	1307	1381	-74
HHS	986	1031	-45
PAL Charter	58	62	-4
Mount Ascension 9-12	65	7*****	58
<b>Total</b>	<b>7467</b>	<b>7589</b>	<b>-104</b>

\*includes Early Literacy Targeted Intervention

(ELTI Kindersprouts: Funded 4 years olds)

\*\* includes New Montessori Charter School Numbers

\*\*\*Includes Explore School in Mount Ascension for 1-8

\*\*\*\*Explore School

\*\*\*\*\*Access to Success

10/7/2024

	Broadwater	Broadwater** Montessori	Four Georg.	Hawthorne	Jim Darcy	Kessler	Rossiter	West Side		Bryant	Central	Central** Montessori	Jefferson	Smith	Smith** Montessori	Warren	East Side	Mount Ascension**	Total Elementary	
*ELTI							29	29	*ELTI	18							18	*ELTI	0	47
K	34		79	27	74	35	41	290	K	41	37	18	40	40		35	211	K	0	501
1	33	12	68	27	79	38	53	310	1	34	42	12	38	33	12	38	209	1	9	528
2	21	12	80	28	71	33	49	294	2	40	38	12	40	33	12	48	223	2	11	528
3	50	12	83	37	83	47	82	394	3	50	38	12	44	40	12	58	254	3	9	657
4	30	12	83	33	83	44	56	341	4	50	42	12	35	30	12	46	227	4	11	579
5	39	12	76	29	78	38	57	329	5	49	41	12	46	40	12	49	249	5	9	587
Total	207	60	469	181	468	235	367	1987	Total	282	238	78	243	216	60	274	1391	Total	49	3427

CR Anderson	
6	304
7	313
8	351
Total	968

Helena Middle	
6	257
7	223
8	225
Total	705

Mount Ascension**	
6	16
7	16
8	21
Total	53

Total Middle School
577
552
597
1726

Capital High	
9	339
10	342
11	332
12	294
Total	1307

Helena High	
9	246
10	261
11	248
12	231
Total	986

PAL**	
9	0
10	5
11	21
12	32
Total	58

Mount Ascension**	
9	13
10	21
11	21
12	10
Total	65

Total High School
598
629
622
567
2416

Total District
7569

\*Early Literacy Target Intervention (Kindersprouts: Funded 4 years olds)  
 \*\*Charter School

**PRELIMINARY GENERAL FUND BUDGET PROJECTIONS BASED ON FALL ENROLLMENT COUNTS**

School	October	Adjustments for Part-time	Adjusted	Adjusted	Change From PY
	2024 Enrollment		October 2024 Enrollment	October 2023 Enrollment	
Broadwater	207		207.00	246.00	-39.00
Bryant	282		282.00	328.00	-46.00
Central	238		238.00	279.00	-41.00
Hawthorne	181		181.00	219.50	-38.50
Jefferson	243		243.00	242.00	1.00
Kessler	235	-1.5	233.50	242.00	-8.50
Rossiter	367		367.00	366.00	1.00
Smith	216		216.00	284.00	-68.00
Four G's	469		469.00	451.75	17.25
Jim Darcy	468	-2	466.00	473.75	-7.75
Warren	274		274.00	305.00	-31.00
Montessori Charter	198		198.00	0.00	198.00
Mount Ascension	65	-43.5	21.50	0.00	21.50
HMS-6th	257	-0.75	256.25	231.75	24.50
CRA-6th	304	-3	301.00	317.25	-16.25
<b>Total Elementary</b>	<b>4004</b>	<b>-50.75</b>	<b>3953.25</b>	<b>3986.00</b>	<b>-32.75</b>
HMS-7th & 8th	448	-0.75	447.25	446.00	1.25
CRA-7th & 8th	664	-3.75	660.25	698.00	-37.75
Mount Ascension	37	-16.75	20.25	0.00	20.25
<b>Total Middle School</b>	<b>1149</b>	<b>-21.25</b>	<b>1127.75</b>	<b>1144</b>	<b>-16.25</b>
<b>Total Elementary District</b>					<b>-49.00</b>
CHS	1307	-14	1293.00	1369.56	-76.56
HHS	986	-8.5	977.50	1085.13	-107.63
Mount Ascension	65	-19.75	45.25	0.00	45.25
PAL	58		58.00	0.00	58.00
<b>Total High School District</b>	<b>2416</b>	<b>-42.25</b>	<b>2373.75</b>	<b>2454.69</b>	<b>-80.94</b>

	ANB							
	E1	E2	E3	M1	M2	H1	H2	H3
FY2026 Projected Based on Fall Count	3879	<i>Not enough</i>	206	1151	21	2336	48	61
FY2025	4141			1173		2508		
FY2024	4233			1204		2562		
3 yr average	4085		69	1176	8	2477	16	21
PY	4164			1215		2529		
	-79	0	69	-39	8	-52	16	21

**PRELIMINARY GENERAL FUND BUDGET PROJECTIONS BASED ON FALL ENROLLMENT COUNTS**

PROJECTED BUDGET BASED ON FALL ENROLLMENT COUNTS						
	Elementary			High School		
	FY 2025	Projected 2026	Change	FY 2025	Projected 2026	Change
BASE (Minimum) Budget:	33,673,672.13	34,346,543.17	672,871.04	18,561,470.37	18,973,833.94	412,363.57
Maximum Budget:	42,149,310.16	42,973,533.47	824,223.31	23,132,907.18	23,601,126.68	468,219.50
Highest Budget Without a Vote:	41,908,287.58	42,581,158.62	672,871.04	23,299,632.33	23,601,126.68	301,494.35
Highest Budget With a Vote:	42,149,310.16	42,973,533.47	824,223.31	23,299,632.33	23,601,126.68	301,494.35
Highest Voted Amount:	241,022.58	392,374.85		-	-	
<b>Adopted Budget</b>	<b>41,908,287.58</b>			<b>23,299,632.33</b>		
	Elementary			High School		
Increase/(Decrease) - No Vote	672,871	1.61%		301,494.35	1.29%	
Increase/(Decrease) - Vote	1,065,246	2.54%		N/A		
Estimated Increase/(Decrease) in Mills	2.50			-		
Estimated Impact on \$100,000 Home:	\$3.36					
Estimated Impact on \$300,000 Home:	\$10.08					
Estimated Impact on \$600,000 Home:	\$20.17					