



## Board of Trustees Meeting

Lincoln Center | 1325 Poplar St. | Helena, MT 59601

Tuesday, November 11<sup>th</sup>, 2025 - 5:30 p.m.

Board of Trustees Conference Room and via  
TEAMS

[Join the meeting now](#)

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### AGENDA

I. **CALL TO ORDER /PLEDGE OF ALLEGIANCE**

II. **REVIEW OF AGENDA**

III. **RECOGNITIONS**

A. **MPTF and NEA Awards for Teaching Excellence**

Congratulations to Jefferson Elementary Educator Mr. Kellen Alger who is the recipient of the Montana Professional Teaching Foundation (MPTF) Award for Teaching Excellence and has been nominated to the NEA Foundation for the Awards for Teaching Excellence. This prestigious recognition honors outstanding educators who exemplify commitment to student success, professional growth, and community engagement.

B. **Claes Nobel Educator of Distinction Award**

Congratulations to Helena High School Educator Ms. Erin Cleveland who is the recipient of the Claes Nobel Educator of Distinction Award granted by The National Society of High School Scholars. This prestigious award recognizes educators who have demonstrated outstanding commitment to excellence in education, inspired academic achievement, and made a lasting impact on the lives of their students.

C. **G.R.I.T. Award**

Congratulations to Ms. Lona Carter, Student Health Services & Special Education Director for Helena Public Schools, for receiving the G.R.I.T. Award from the Montana Health Care Foundation for her work in supporting school-based health. The G.R.I.T. Award celebrates the Resilient, Innovative, Tenacious, and Genuine individuals making a difference in school-based health care in

Montana. Ms. Carter’s outstanding leadership, compassion, and tireless dedication to supporting student well-being embody the very essence of this recognition.

**D. Administrator of the Year Award**

Congratulations to Mr. Josh McKay, Assistant Superintendent 6-12, for Helena Public Schools for receiving the Administrator of the Year Award at the MTACTE Fall Institute. This award recognizes administrative CTE professionals at the school, district, county, state or federal level who have demonstrated leadership in ensuring teacher and student success and have made significant contributions toward innovative, unique and effective career and technical education programs. Assistant Superintendent McKay’s leadership and dedication to expanding meaningful CTE opportunities exemplify excellence in educational leadership and continue to make a lasting impact across our district and state.

**E. G.V. Erickson Award**

Congratulations to Superintendent Rex Weltz, recipient of the prestigious G.V. Erickson Award, presented by the School Administrators of Montana (SAM). This distinguished honor represents the highest recognition for a Montana school administrator and celebrates those who have made outstanding contributions to the advancement of public education in our state. Superintendent Weltz’s visionary leadership, unwavering dedication, and commitment to excellence continue to strengthen Helena Public Schools, support students and staff, and inspire the broader Montana education community.

**IV. SUPERINTENDENT’S REPORT**

**V. 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.*

**VI. NEW BUSINESS**

**A. Consent Action Items**

1. Personnel Actions
2. Warrants
3. Approval of FY 2025-26 Out-Of-District Attendance Agreements (Non-Resident Students Attending HPS)
4. Acknowledge FY 2025-26 Out-Of-District Attendance Agreements (Helena Resident Students Attending Other School Districts)
5. 9.23.25 Board of Trustees Work Session Meeting Minutes
6. 9.24.25 Board of Trustees Special Board Meeting Minutes

**B. Items For Action**

1. Hawthorne Elementary- Request for Proposal (RFP)
2. May Butler Center Property- Request for Proposal (RFP)

**C. Item For Information**

1. Enrollment Update

**D. Items For Information-Facilities Bond Projects Updates**

1. Moody's Bond Rating Update
2. Helena High Campus Update
  - a. Helena High School
  - b. Project For Alternative Learning (PAL)
  - c. District Kitchen
  - d. Competition Stadium
3. Capital High School Architect Selection and Planning Update
4. Kessler Elementary School-Architect RFQ Timeline
5. GCCM RFQ/RFP Timeline
  - a. Helena High School
  - b. Capital High School
  - c. Kessler Elementary School

**E. Reports**

1. Student Representatives Report
2. Helena Education Association Report
3. Facilities & Technology Committee Report
4. Budget & Finance Committee Report
5. Teaching & Learning Committee Report
6. Policy Committee Report
7. Health Benefits Committee Report
8. Wellness Committee Report
9. Montana School Boards Association Report
10. Parent Council Visit Report

VII. UPCOMING MEETINGS

VIII. BOARD/SUPERINTENDENT COMMENTS

IX. ADJOURNMENT

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item I.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:**        **Call To Order/Pledge of Allegiance**

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item II.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:        Review of Agenda**

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item III.A.-E.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

- Item Title:**        **Recognitions**
- A. MPTF and NEA Awards for Teaching Excellence
  - B. Claes Nobel Educator of Distinction Award
  - C. G.R.I.T. Award
  - D. Administrator of the Year Award
  - E. G.V. Erickson Award

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item IV.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title: Superintendent's Report**

HELENA SCHOOL DISTRICT #1  
OFFICE OF THE SUPERINTENDENT

*To: Board Chair Jennifer McKee and Board of Trustees*  
*FROM: Mr. Wertz, Superintendent*  
*RE: Superintendent Report*  
*DATE: November 11th, 2025*

- Recognitions
  - Native American Heritage Month
  - Veterans Day-November 11
  - National School Psychology Week-November 3-7
  - National Substitute Educators Day-November 21
  - Thank you to Becca Leaphart, and the Helena Education Foundation, for awarding Spark Grants and Great Idea Grants across the district, and surprising teachers who were selected for Let's Talk About Great Teachers' recognition!
  - Thank you to Callie Aschim & the Chamber of Commerce for hosting our first Brews & Blueprints-More Events to Come!
  - Welcome Trustee Keith Meyer and a special thank you to the individuals that applied and interviewed for the vacant seat.
  - Ms. Lona Carter - G.R.I.T Award
  - Mr. Josh McKay - CTE Administrator of the Year Award
  - Ms. Erin Cleveland - Helena High School-Claes Nobel Educator of Distinction Award
  - Mr. Kellen Alger - Jefferson Elementary-MPTF & NEA Awards for Teaching Excellence
  
- New Business
  - Director of Finance Interviews
  - Bridge Alliance Update
  - Data Dashboard
  - HPS & Community Connections Support During Government Shutdown
  - Facilities Bond Projects Updates –
    - Bond/Construction/Facility Meetings
      - Owner's Rep
      - HHS Project – Architect Team In Motion
      - CHS Project – Architect Team Start Up
    - Teacher Early Retirement Incentive Update
    - Exploring Educational (Teaching) Pathway – “Grow Our Own” Program
      - Para to Teacher
      - Teacher to Administration
    - Kinder Sprouts Update
    - GT Program Review Update
    - Other

HELENA SCHOOL DISTRICT #1  
OFFICE OF THE SUPERINTENDENT

- Outreach/Meetings
  - MCEL Conference
  - Helena Community Breakfast Sponsored By Carroll College
  - AA Superintendents Weekly Meeting
  - Bond/Construction/Facility Meetings
    - Owner's Rep
    - HHS Project – Architect Team
    - CHS Project – Architect Team
  - Board of Health Meeting
  - Chamber of Commerce
  - Board Leadership
  - HEA
  - HEF
  - HEF Executive Committee
  - Parent Advisory Committee
  - Teacher Advisory Committee
  - Cabinet & Leadership
  - TV, Print, Radio, Media
  - City of Helena
  - Other
  
- Other

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item V.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:       General Public Comment**

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.A.1.-A.6.**

- Call To Order/Pledge of Allegiance
- Review of Agenda
- Recognitions
- Superintendent's Report
- General Public Comment
- Consent Action Items
- Items For Action
- Item For Information
- Items For Information-Facilities Bond Projects Updates
- Reports
- Upcoming Meetings
- Board/Superintendent Comments
- Adjournment

**Item Title:        Consent Action Items**

1. Personnel Actions
2. Warrants
3. Approval of FY 2025-26 Out-Of-District Attendance Agreements (Non-Resident Students Attending HPS)
4. Acknowledge FY 2025-26 Out-Of-District Attendance Agreements (Helena Resident Students Attending Other School Districts)
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6. 9.24.25 Board of Trustees Special Board Meeting Minutes

Board Action	1st Motion	Second	Aye	Nay	Other
Hathhorn					
McKee					
Satre					
Murnane Butcher					
Cleatus					
Walsh					
Armstrong					
Meyer					

**PERSONNEL ACTIONS**

October 15, 2025 – November 11, 2025

**CERTIFIED PERSONNEL**

**Appointments**

<b><u>Location/Assignment</u></b>	<b><u>Name</u></b>	<b><u>Offered Salary</u></b>	<b><u>Accepted Salary</u></b>	<b><u>Start Date</u></b>
Smith/Montessori	Appel, Sidney	\$256.36/day	\$256.36/day	01/05/2026
CHS/Social Studies	Kivisto, Jaden	\$256.36/day	\$256.36/day	11/03/2025
CHS/Science-Biology	Pujol, Beatrice	\$256.36/day	\$256.36/day	01/05/2026

**Terminations/Retirements**

<b><u>Location/Assignment</u></b>	<b><u>Name</u></b>	<b><u>Reason</u></b>	<b><u>Effective</u></b>
District Wide/Guest Teacher-Adapt. PE	Kivisto, Jaden	Contract Fulfilled	10/24/2025
CRA/Spanish	Martinez, Melanie	Contract Fulfilled	11/14/2025
Lincoln Center/Chief of Staff	Ridgway, Barbara	Retirement	0/03/2025

**Leaves**

<b><u>Location/Assignment</u></b>	<b><u>Name</u></b>	<b><u>Term</u></b>	<b><u>Type of Leave</u></b>
CHS/Social Studies	Kelly, Cameron	11/10/2025 to 06/10/2026	LOAWOP

**CLASSIFIED PERSONNEL**

**Appointments**

<b><u>Location/Assignment</u></b>	<b><u>Name</u></b>	<b><u>Offered Salary</u></b>	<b><u>Accepted Salary</u></b>	<b><u>Start Date</u></b>
HHS/Day Float Custodian	Andrews, Madonna	\$17.39/hr.	\$17.39/hr.	11/03/2025
CHS/Para Educator	Hellickson, Scott	\$16.81/hr.	\$16.81/hr.	11/03/2025
CRA/Evening Float Custodian	Key, Homer	\$17.40/hr.	\$17.40/hr.	10/20/2025
CHS/Evening Float Custodian	Langdorf, Timothy	\$17.40/hr.	\$17.40/hr.	10/30/2025

Facilities/Centralized Maintenance	McGraw, Kent	\$19.07/hr.	\$19.07/hr.	10/16/2025
Four Georgians/Para Educator	Moser, Connie	\$19.03/hr.	\$19.03/hr.	10/31/2025
Four Georgians/Para Educator	Ranalli, Heather	\$16.15/hr.	\$16.15/hr.	11/03/2025
Central/Para Educator	Romano, Aila	\$15.50/hr.	\$15.50/hr.	10/20/2025
Facilities/Maintenance Plumber	Walker, Josiah	\$38.76/hr.	\$38.76/hr.	11/03/2025
Kessler/Part-time (.45 FTE) SACC Para	Wiseman, Michelle	\$19.03/hr.	\$19.03/hr.	11/07/2025
Bryant/Para Educator	Zoeckler, Jordan	\$18.58/hr.	\$18.58/hr.	11/24/2025

**Terminations/Retirements**

<b><u>Location/Assignment</u></b>	<b><u>Name</u></b>	<b><u>Reason</u></b>	<b><u>Effective</u></b>
Kessler/SACC Para Educator	Anderson, Parkar	Resignation	11/05/2025
Central/Para Educator	Howard, Rachael	Resignation	10/31/2025
Kessler/Evening Custodian	Nall, Bobbi	Separation	10/20/2025

**Leaves**

<b><u>Location/Assignment</u></b>	<b><u>Name</u></b>	<b><u>Term</u></b>	<b><u>Type of Leave</u></b>
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**SUPPLEMENTARY CONTRACT ASSIGNMENT**

<b><u>Name</u></b>	<b><u>Assignment</u></b>	<b><u>Salary</u></b>	<b><u>Start Date</u></b>	<b><u>End Date</u></b>	<b><u>Location</u></b>
Zielinski, Karen	Swim - Head Coach	\$ 4,192.00	11/24/2025	3/14/2026	Helena/Capital
Lary Jr, Edgar	Swim - Asst Coach	\$ 2,210.00	11/24/2025	3/14/2026	Helena/Capital
Goody, Hollee	Basketball - CHS Coord Boys & Girls	\$ 4,000.00	11/24/2025	3/14/2026	Capital High
Almquist, Guy	Basketball - Head Coach Varsity Boys	\$ 5,380.00	11/24/2025	3/14/2026	Capital High
Grovom, Ryan	Basketball - Head Coach JV Boys	\$ 3,680.00	11/24/2025	3/14/2026	Capital High
Roos, Kathie	Basketball - Head Coach Soph Boys	\$ 3,628.00	11/24/2025	3/14/2026	Capital High
Boka, Brandon	Basketball - Head Coach Frosh Boys	\$ 2,909.00	11/24/2025	3/14/2026	Capital High

Reyant, Mathew	Basketball - Head Coach Varsity Girls	\$ 5,380.00	11/24/2025	3/14/2026	Capital High
VanHemelryck, Shelby	Basketball - Head Coach JV Girls	\$ 3,680.00	11/24/2025	3/14/2026	Capital High
Lyndes, Casey	Basketball - Head Coach Soph Girls	\$ 3,628.00	11/24/2025	3/14/2026	Capital High
Curry, Bryana	Basketball - Head Coach Frosh Girls	\$ 2,909.00	11/24/2025	3/14/2026	Capital High
McMahon, Richard	Wrestling - CHS Coordinator	\$ 408.00	11/24/2025	3/14/2026	Capital High
Helmick, Chance	Wrestling - Head Coach Boys	\$ 5,076.00	11/24/2025	3/14/2026	Capital High
Nay, Kyle	Wrestling - Asst Coach Boys	\$ 3,548.00	11/24/2025	3/14/2026	Capital High
Kovick, Noah	Wrestling - Asst Coach Boys	\$ 1,774.00	11/24/2025	3/14/2026	Capital High
McKay, Clifford	Wrestling - Head Coach Girls	\$ 5,076.00	11/24/2025	3/14/2026	Capital High
Fonger, Michael	Wrestling - Asst. Coach Girls	\$ 3,548.00	11/24/2025	3/14/2026	Capital High
Schulte, Meghan	Basketball - HHS Coordinator Boys	\$ 2,000.00	11/24/2025	3/14/2026	Helena High
Day, Brandon	Basketball - Head Coach Varsity Boys	\$ 5,380.00	11/24/2025	3/14/2026	Helena High
Wetzel, Lance	Basketball - Head Coach JV Boys	\$ 3,680.00	11/24/2025	3/14/2026	Helena High
Kimball, Tarun	Basketball - Head Coach Soph Boys	\$ 3,628.00	11/24/2025	3/14/2026	Helena High
Wigen, Joshua	Basketball - Head Coach Frosh Boys	\$ 2,909.00	11/24/2025	3/14/2026	Helena High
Hussey, Randy	Basketball - HHS Coordinator Girls	\$ 2,000.00	11/24/2025	3/14/2026	Helena High
Dudek, Benjamin	Basketball - Head Coach Varsity Girls	\$ 5,380.00	11/24/2025	3/14/2026	Helena High
Michaud, Amy	Basketball - Head Coach JV Girls	\$ 3,680.00	11/24/2025	3/14/2026	Helena High
Russell, Marissa	Basketball - Head Coach Soph Girls	\$ 3,628.00	11/24/2025	3/14/2026	Helena High
Lieberg, Jaedon	Basketball - Head Coach Frosh Girls	\$ 2,909.00	11/24/2025	3/14/2026	Helena High
Rainey, Anne	Wrestling - HHS Coordinator	\$ 408.00	11/24/2025	3/14/2026	Helena High
Bogard, Samuel	Wrestling - Head Coach Boys	\$ 5,076.00	11/24/2025	3/14/2026	Helena High
Michaud, Kolbe	Wrestling - Asst Coach Boys	\$ 3,548.00	11/24/2025	3/14/2026	Helena High
Young, Ruger	Wrestling - Asst Coach Boys	\$ 1,774.00	11/24/2025	3/14/2026	Helena High
Murgel, Jarrod	Wrestling - Head Coach Girls	\$ 5,076.00	11/24/2025	3/14/2026	Helena High
Mehrens, Michael	Wrestling - Asst. Coach Girls	\$ 3,548.00	11/24/2025	3/14/2026	Helena High

# Helena School District #1

## Warrants October 1 to 31, 2025

Direct Deposits: \$3,386,756.06

Payroll Warrants: 3,386,756.06-70132369

Payroll Deduction: 69306503-69306526

Non-Check Payroll Deductions: \$ 5,715,268.21

Non-Check Accts Payable Deductions: \$ 1,457,430.29

Non-Check Accts Payable Deductions- HHS Extracurricular: \$0

Claim Warrants: 69306216-69306633

CRA Middle School Student Activity Checks: 17487-17489

HMS Middle School Student Activity Checks:

Capital High Student Activity Checks: 25120-25159

Helena High Student Activity Checks: 37122-37152

Cancelled Warrants: \$67.56

We certify that all warrants herein listed were prepared and previously paid for, are just and correct to the best of our knowledge, and that the board of trustees has authorized the issuance of the same.

Chairperson \_\_\_\_\_

Business Manager \_\_\_\_\_

APPROVAL OF **FY 2025-26** OUT-OF-DISTRICT ATTENDANCE AGREEMENTS  
(NONRESIDENT STUDENTS ATTENDING HELENA SCHOOL DISTRICT)

Fiscal Year 2025-26

Discretionary Attendance:

Grade	District of Residence	Address	School of Attendance
K	Clancy Elementary	Clancy, MT 59634	Bryant Elementary
1	Trinity Elementary	Helena, MT 59602	Broadwater Elementary
2	Clancy Elementary	Clancy, MT 59634	Bryant Elementary
6	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
6	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
6	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
6	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
6	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
6	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
6	Elliston Elementary	Elliston, MT 59728	CR Anderson Middle School
6	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
7	Trinity Elementary	Canyon Creek, MT 59633	CR Anderson Middle School
7	Clancy Elementary	Clancy, MT 59634	CR Anderson Middle School
7	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
7	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
8	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
8	East Helena K-12	East Helena, MT 59635	CR Anderson Middle School
8	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
8	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
8	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School
8	Trinity Elementary	Helena, MT 59602	CR Anderson Middle School

**APPROVAL OF FY 2025-26 OUT-OF-DISTRICT ATTENDANCE AGREEMENTS  
(NONRESIDENT STUDENTS ATTENDING HELENA SCHOOL DISTRICT)**

Running Total of FY 2025-26 Out-of-District Attendance Agreements

Address

Grade	East Helena	Clancy	Montana City	Jefferson City	Basin	Wolf Creek	Boulder	Elliston	Trinity	Wolf Point	Dillon	Billings	Chester-Joplin-Inverness	Missoula	Great Falls	Butte	Townsend	Superior	Total
Ksprouts	6	1	1						8										16
K	8	1	1						9										19
1	6					1			17										24
2	8	1							11										20
3	6	1						1	11										19
4	3		1					1	13										18
5	6	1							10	1		1		1					20
6	5		2					1	10		1					1			20
7	3	1	1						3	1					1			1	11
8	3	2	1		1				6								2		15
9	8	21	2	3									1				1		36
10	1	21									1				1				24
11	6	16	1				1										2		26
12	12	23	1	5			1												42
	81	89	11	8	1	1	2	3	98	2	2	1	1	1	2	1	5	1	310

ACKNOWLEDGE OUT-OF-DISTRICT ATTENDANCE AGREEMENTS  
(HELENA RESIDENT STUDENTS ATTENDING OTHER SCHOOL DISTRICTS)

HELENA STUDENTS ATTENDING OTHER SCHOOL DISTRICTS

Fiscal Year 2025-26

Discretionary Attendance:

Grade	Address	District of Attendance
9	Cascade, MT 59421	Great Falls High School

Mandatory Attendance:

Grade	Address	District of Attendance
10	Helena, MT 59601	Missoula High School

**ACKNOWLEDGE OUT-OF-DISTRICT ATTENDANCE AGREEMENTS  
(HELENA RESIDENT STUDENTS ATTENDING OTHER SCHOOL DISTRICTS)**

Running Total of Acknowledged 2025-26 Out-of-District Attendance Agreements  
(Helena Resident Students Attending Other School Districts)

Grade	Montana											Total
	East Helena K-12	City Elementary	Clancy Elementary	Jefferson High School	Townsend K-12	Cascade High School	Huntley Project K-12	Fairfield High School	Augusta High School	Great Falls Elementary	Missoula High School	
Pre-K	7	14	3									24
K	10	22	3									35
1	11	10	7									28
2	7	5	4									16
3	11	3	5									19
4	14	13	8									35
5	9	4	5									18
6	16	5	7									28
7	13	15	6									34
8	9	1	3									13
9	21			3	1	2			1			28
10	15			4						1		20
11	27			4		2		1	1			35
12	21			3		2						26
	191	92	51	14	1	6	0	1	1	1	1	359



*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 Work Session**

Tuesday, September 23<sup>rd</sup>, 2025  
12:00 p.m.  
Smith Elementary School

### **MINUTES**

#### **ATTENDEES**

<i>Trustees</i>	<i>Others</i>
Jennifer Walsh, Vice Chair	Rex Weltz, Superintendent
Jenny Murnane Butcher, Trustee	Jane Shawn, HEA President
Kay Satre, Trustee	Janelle Mickelson, Business Director
Janet Armstrong, Trustee	Sarah Simpson, Smith Elementary Principal
Siobhan Hathhorn, Trustee	Candice Delvaux, Executive Assistant
	Gary Myers, Director of Educational Technology
	Justine Alberts, Assistant Superintendent PreK-5
	Keri Mizell, Human Resources Director
	Kaitlyn Hess, Assessment & Federal Programs Director
	Lona Carter, Student Health Services & Special Education Director
	Todd Verrill, Facilities Director
	Eric Peterson, Activities Director
	Taylor Lassiter, Communications Specialist
	Abby Kuhl, Warren Elementary Principal
	Nick Radley, Central Elementary Principal
	Several Guests of the Public

#### **I. CALL TO ORDER/ PLEDGE OF ALLEGIANCE**

Board Vice Chair Jennifer Walsh called the meeting to order at 12:02 p.m. and the Board participated in the Pledge of Allegiance.

**II. REVIEW OF AGENDA**

Board Vice Chair Jennifer Walsh reviewed the agenda with the Board of Trustees and there were no changes.

The Board of Trustees then proceeded to hear general public comment.

**III. GENERAL PUBLIC COMMENT**

There was no general public comment.

**IV. PRESENTATION**

Ms. Sarah Simpson, Principal of Smith Elementary School, provided a comprehensive overview of the school and reviewed the pamphlet included in the agenda.

The pamphlet begins by outlining the vision of Smith Elementary which states: *“To promote academic excellence in a respectful caring community.”*

Principal Simpson reviewed the following information about Smith Elementary with the Board of Trustees.

Enrollment

KinderSprouts (1)

17

Kindergarten (2)

29

First (2)

41

Second (2)

34

Third (2)

35

Fourth (2)

38

Fifth (1)

28

Montessori Programs:

Kindergarten (1)  
18

Lower Montessori (2)  
35

Upper Montessori (1)  
24

Total School Enrollment:299

Free and Reduced Lunch  
39%

ESL  
17

Kid Packs  
57

Students with a 504 Plan  
8

McKinney-Vento  
24

Individual Education Plans  
62

Community Partnerships

Carroll College  
READ Dog Program  
Lewis and Clark Library Book Mobile  
Book Pals  
Kids Hope  
Gates of the Mountains  
Helena Symphony  
Holter Museum  
Cinemark Movie Theater  
Great Divide Ski  
Starbase  
HART  
Helena Food Share  
Helena Police Department  
Helena Education Foundation

Parent for Smith (PSS)  
Helena Public Montessori Parents (HPMP)  
Indian Education For All  
Exploration Works  
Week of the Young Child

### Connections

Monthly Whole School Celebration Assemblies  
Summer Playground Playdates and Popsicles  
Back to School Family Resource Event  
Back to School Open House  
Cheers and Tears  
Carnival Classic  
Fabulous Firsts  
Smith Tailgate at HHS  
Book Fairs  
Parent Teacher Conferences  
Walk to School Day  
Raise Craze  
Healthy Choice Spirit Week  
Math Night  
Christmas Program  
Food Drive for Families  
Family Movie Night  
Missoula Children's Theater  
Unified Spirit Week  
Pancakes with Parents  
May Day Baskets  
Family Day at the Ballpark  
Field Day  
Saber Packs  
IEFA Tutor

Principal Simpson concluded her presentation by highlighting the Smith School leadership team, outlining the school's attendance targets and reading and math goals, and responding to questions from the Board of Trustees regarding the information presented.

The Board of Trustees moved on to hear any final board comments.

#### **V. BOARD COMMENTS**

Superintendent Rex Weltz concluded by stating that a Special Board of Trustees meeting will be held tomorrow evening to canvass the election results, approve the letters of determination

for alternative project delivery contracts, and receive a presentation on the bond issuance timeline and procedures.

**VI. ADJOURNMENT**

Board Vice Chair Jennifer Walsh adjourned the meeting at 12:39 p.m.

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Candice Delvaux, Recording Secretary



**Superintendent**

Rex Wertz  
324-2001

**Business Manager**

Janelle Mickelson  
324-2040

## **Board of Trustees Special Board Meeting**

Lincoln Center  
1325 Poplar St., Helena, MT 59601  
And on TEAMS

**Wednesday, September 24th, 2025**  
5:30 p.m.

### **MINUTES**

**ATTENDANCE – Present unless otherwise noted.**

Jennifer McKee, Chair  
Jennifer Walsh, Vice Chair  
Kay Satre, Trustee  
Siobhan Hathhorn, Trustee  
Jenny Murnane Butcher,  
Trustee  
Linda Cleatus, Trustee  
Brock Gardipee, Helena High School Student Representative for the Board of Trustees  
Delaney Lynch, Capital High School Student Representative for the Board of Trustees  
Rex Wertz, Superintendent  
Josh McKay, Assistant Superintendent  
Janelle Mickelson, Business Director  
Todd Verrill, Facilities Director  
Gary Myers, Director of Educational  
Technology  
Kaitlyn Hess, Data & Federal Programs  
Director  
Justine Alberts, Assistant Superintendent  
PreK-5  
Keri Mizell, Human Resources Director  
Taylor Lassiter, Communications Specialist  
Jane Shawn, HEA President  
Shane Swandal, Hulteng CCM, Inc.  
Alec Pinero, Hulteng CCM, Inc.  
Dan Semmens, Partner, Dorsey & Whitney LLP  
Bridget Ekstrom, Managing Director, Public Finance Banker, D.A. Davidson & Co.  
Many guests of the public as well as Helena School District Staff

## **I. CALL TO ORDER/PLEDGE OF ALLEGIANCE**

Board Chair Jennifer McKee called the meeting to order at 5:31 p.m. and the Board participated in the Pledge of Allegiance.

## **II. REVIEW AGENDA**

The Board of Trustees reviewed the agenda and there were no suggested changes.

The Board of Trustees moved on to hear a sabbatical presentation given by Mr. James Irby.

## **III. SABBATICAL PRESENTATION-Mr. James Irby**

In 2024-2025 the Board of Trustees approved one sabbatical for Mr. James Irby. Beginning this year all sabbatical recipients will make a brief presentation to the Board at the conclusion of their sabbatical. Below is a summary of Mr. Irby's sabbatical proposal.

Mr. Irby proposed a semester sabbatical to conduct the research necessary to complete his doctoral dissertation in Literature and Criticism at Indiana University in Pennsylvania. His dissertation focuses on how the contributions of 1980s anthropomorphic comics from independent publishers benefit society. This is a fairly new field of study and James believes there is literary merit within comics, and he planned to show the value of this genre. Comics for the most part have been viewed as disposable literature unworthy of any literary merit. However, over the last 30 years, scholars have been turning to these works with renewed energy and view them as an untapped resource brimming with content waiting to be analyzed. His research focuses on a comic subgenre that has received little attention – funny animal comics. His dissertation will specifically focus on the second wave of anthropomorphic comics to include Teenage Mutant Ninja Turtles which established the movement and others like Usagi Yojimbo, Dalgoda, Omaha the Cat Dancer, Space Beaver, Boris the Bear and Fish Police.

After his presentation, Mr. Irby addressed all questions from the Board of Trustees regarding the information he presented.

The Board of Trustees moved on to hear the superintendent's report.

## **IV. SUPERINTENDENT'S REPORT**

Superintendent Wertz presented his Superintendent Report to the Board of Trustees and discussed topics including but not limited to acknowledging the board, administration, and community for their collaborative efforts over the past several months, particularly related to recent bond initiatives. He highlighted the importance of professional support from the district's owner's representative and other experts to ensure successful project planning and execution.

He provided recognitions and acknowledgments, including:

- Barb Ridgway's upcoming departure and her work transferring responsibilities within central

administration.

- Janelle Mickelson’s upcoming retirement as Business Manager and the district’s efforts to capture her knowledge before her departure.
- Appreciation for the Lewis and Clark County Elections Office, community members, Helena Schools staff, the Chamber of Commerce, the League of Women Voters, and student board representatives for their contributions to the bond efforts.
- Recognition of Taylor Lassiter, the new Communications Specialist, for enhancing transparency and public engagement through social media and outreach.

Superintendent Wertz also highlighted the impact of the bond projects on district facilities, including updated learning spaces, technology, athletic complexes, and the district kitchen, emphasizing the long-term benefits for students and the community.

The report concluded with a reminder of the significance of these initiatives for current and future generations of students and the importance of continued community support.

That concluded the Superintendent’s Report portion of the agenda. Superintendent Wertz responded to questions from the Board of Trustees, after which the trustees proceeded to hear general public comment.

## V. GENERAL PUBLIC COMMENT

There was no general public comment and the Board of Trustees moved on to review the Consent Action Items.

## VI. NEW BUSINESS

### A. Consent Action Items

1. Personnel Actions
2. Approval of FY 2025-26 Out-Of-District Attendance Agreements (Non-Resident Students Attending HPS)
3. Approval of 8.26.25 Board of Trustees Special Board Meeting Minutes

Board Chair Jennifer McKee commented, “At this point I would entertain a motion to approve the *Consent Action Items* as presented.”

**Motion:** Trustee Siobhan Hathhorn moved to approve the *Consent Action Items* as presented. Trustee Jenny Murnane Butcher seconded the motion.

**Public Comment:** None.

**Vote:** 6-0 motion carries unanimously.

That concluded the approval of the Consent Action Items. The Board of Trustees moved on to review the Items for Action.

## **B. Items For Action**

1. **Canvass of Election Results for Elementary Bond Levy**
2. **Canvass of Election Results for High School Bond Levy**
3. **Issue Certificates of Election for Elementary Bond Levy**
4. **Issue Certificates of Election for High School Bond Levy**
5. **Adoption of Resolution Authorizing Issuance of the Elementary Bonds**
6. **Adoption of Resolution Authorizing Issuance of the High School Bonds**

Ms. Janelle Mickelson, Business Manager, and Mr. Dan Semmens, Partner, Dorsey & Whitney LLP introduced actions items one through six and addressed all questions from the Board of Trustees.

### **Background:**

Bond elections for both the Helena Elementary School and the Helena High School were held on Tuesday September 9, 2025. Pursuant to 20-20-415, MCA, at the first regular or special meeting after receiving the certified tally sheets and no later than 25 days after the election, trustees must canvass the election results. After the canvass of the total votes cast, trustees must issue a certificate of election. In the case of an election on a proposition, the trustees must issue a certificate specifying the outcome of the election.

### **Considerations:**

- The County Election Office provided the attached canvass reports on September 16, 2025.
  - Highlights:
    - Total registered voters in the elementary school were 40,257. Total ballots issued were 34,778. Total ballots tabulated were 20,985 with a total voter turnout of 52.13%.
    - Total registered voters in the high school were 42,483. Total ballots issued were 36,763. Total ballots tabulated were 22,089 with a total voter turnout of 51.99%.
- The election results were also provided by the county elections office on September 16, 2025.

- Highlights:
  - The elementary bond levy proposition passed with 50.90% of the votes cast (10,631 FOR, 10,256 AGAINST).
  - The high school bond levy proposition passed with 50.82% of the votes cast (11,151 FOR, 10,793 AGAINST).

Superintendent recommendation:

Canvass the election results and issue the certificates of election.

**1. Canvass of Election Results for Elementary Bond Levy**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, “*Canvass of Election Results for Elementary Bond Levy.*”

**Motion:** Trustee Kay Satre moved to approve the action item *Canvass of Election Results for Elementary Bond Levy* as presented. Trustee Linda Cleatus seconded the motion.

**Public Comment:** None.

**Vote:** 5-0 motion carries unanimously. *(Please note that Board Vice Chair Jennifer Walsh abstained from voting as she is a trustee strictly for the high school district, and this action item only pertains to the elementary district.)*

**2. Canvass of Election Results for High School Bond Levy**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, “*Canvass of Election Results for High School Bond Levy.*”

**Motion:** Trustee Jennifer Walsh moved to approve the action item *Canvass of Election Results for High School Bond Levy* as presented. Trustee Siobhan Hathhorn seconded the motion.

**Public Comment:** None.

**Vote:** 6-0 motion carries unanimously.

**3. Issue Certificates of Election for Elementary Bond Levy**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, *Issue Certificates of Election for Elementary Bond Levy.*”

**Motion:** Trustee Linda Cleatus moved to approve the action item *Issue Certificates of Election for Elementary Bond Levy* as presented. Trustee Kay Satre seconded the motion.

**Public Comment:** None.

**Vote:** 5-0 motion carries unanimously. *(Please note that Board Vice Chair Jennifer Walsh*

*abstained from voting as she is a trustee strictly for the high school district, and this action item only pertains to the elementary district.)*

**4. Issue Certificates of Election for High School Bond Levy**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, *Issue Certificates of Election for High School Bond Levy*.”

**Motion:** Trustee Siobhan Hathhorn moved to approve the action item *Issue Certificates of Election for High School Bond Levy* as presented. Trustee Jennifer Walsh seconded the motion.

**Public Comment:** None.

**Vote:** 6-0 motion carries unanimously.

**5. Adoption of Resolution Authorizing Issuance of the Elementary Bonds**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, *Adoption of Resolution Authorizing Issuance of the Elementary Bonds*.”

**Motion:** Trustee Kay Satre moved to approve the action item *Adoption of Resolution Authorizing Issuance of the Elementary Bonds* as presented. Trustee Siobhan Hathhorn seconded the motion.

**Public Comment:** None.

**Vote:** 5-0 motion carries unanimously. *(Please note that Board Vice Chair Jennifer Walsh abstained from voting as she is a trustee strictly for the high school district, and this action item only pertains to the elementary district.)*

**6. Adoption of Resolution Authorizing Issuance of the High School Bonds**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, *Adoption of Resolution Authorizing Issuance of the High School Bonds*.”

**Motion:** Trustee Linda Cleatus moved to approve the action item *Adoption of Resolution Authorizing Issuance of the High School Bonds* as presented. Trustee Jenny Murnane Butcher seconded the motion.

**Public Comment:** None.

**Vote:** 6-0 motion carries unanimously.

**7. Letter of Determination Alternative Project Delivery Helena High School**

**8. Letter of Determination Alternative Project Delivery Capital High School**

## **9. Letter of Determination Alternative Project Delivery Kessler Elementary School**

Mr. Todd Verrill, Facilities Director for Helena Public Schools, presented action items seven through nine: 7. *Letter of Determination Alternative Project Delivery Helena High School*, 8. *Letter of Determination Alternative Project Delivery Capital High School*, and 9. *Letter of Determination Alternative Project Delivery Kessler Elementary School*.

### **Alternative Project Delivery Contracts – Helena High School, Capital High School, and Kessler Elementary School Projects**

#### **Project Management:**

Helena Public Schools has engaged a professional project management consulting firm, Hulteng CCM, Inc., with extensive experience in alternative project delivery methods to oversee the projects in collaboration with District Administration. This partnership ensures strong oversight, compliance with state statutes, and effective coordination throughout all phases of design and construction.

#### **Procurement Process:**

All services will be procured through open and transparent public processes consistent with Montana Code Annotated (MCA) 18-2-502. The District will follow a two-stage selection process:

#### **RFQ/RFP Process:**

A two-stage selection process will be used—beginning with a Request for Qualifications (RFQ) to shortlist firms based on experience, staffing, safety, and bonding capacity, followed by a Request for Proposals (RFP) where finalists submit detailed proposals and presentations. The selection committee will evaluate all submissions to ensure fair, transparent competition and select the firm offering the best overall value to the District.

#### **Project Rationale:**

The Alternative Project Delivery Contract (APDC) approach is being used for these projects due to significant schedule demands and technical complexities, particularly related to demolition, renovation, and new construction activities. The method allows for a fast-track schedule by enabling concurrent design, permitting, and construction phases, supporting the District’s goal of substantial completion and occupancy by Fall 2028.

#### **Benefits:**

Early engagement of a General Contractor/Construction Manager (GC/CM) will enhance cost control, schedule adherence, and value engineering throughout the design and construction phases. Collaboration among the GC/CM, design team, and Owner will ensure constructability, efficiency, and cost-effective design solutions while minimizing disruption to school operations.

#### **Fair Competition:**

The District’s procurement process is specifically structured to avoid favoritism and maintain broad competition. The selection committee will evaluate submittals based solely on published criteria and overall project value, ensuring transparency and integrity in contractor selection.

These combined projects—Helena High School Demolition and New Construction, Capital High School Addition and Renovation, and Kessler Elementary Demolition and New Construction—represent significant investments in modernizing and improving educational facilities across the Helena Public Schools District.

Mr. Verrill and Mr. Shane Swandal, Hulteng CCM, Inc., addressed all questions from the Board of Trustees regarding the information presented.

### **7. Letter of Determination Alternative Project Delivery Helena High School**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, *Letter of Determination Alternative Project Delivery Helena High School*.”

**Motion:** Trustee Siobhan Hathhorn moved to approve the action item *Letter of Determination Alternative Project Delivery Helena High School* as presented. Trustee Linda Cleatus seconded the motion.

**Public Comment:** None.

**Vote:** 6-0 motion carries unanimously.

### **8. Letter of Determination Alternative Project Delivery Capital High School**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, *Letter of Determination Alternative Project Delivery Capital High School*.”

**Motion:** Trustee Jenny Murnane Butcher moved to approve the action item *Letter of Determination Alternative Project Delivery Capital High School* as presented. Trustee Kay Satre seconded the motion.

**Public Comment:** None.

**Vote:** 6-0 motion carries unanimously.

### **9. Letter of Determination Alternative Project Delivery Kessler Elementary School**

Board Chair Jennifer McKee commented, “At this point I would entertain a motion for the following action item, *Letter of Determination Alternative Project Delivery Kessler Elementary School*.”

**Motion:** Trustee Siobhan Hathhorn moved to approve the action item *Letter of Determination Alternative Project Delivery Kessler Elementary School* as presented. Trustee Kay Satre seconded the motion.

**Public Comment:** None.

**Vote:** 5-0 motion carries unanimously. *(Please note that Board Vice Chair Jennifer Walsh abstained from voting as she is a trustee strictly for the high school district, and this action item only pertains to the elementary district.)*

### **C. Item For Information**

1. Overview of Bond Issuance Timeline and Procedures: Bridget Ekstrom, Managing Director, Public Finance Banker, D.A. Davidson & Co.

Ms. Bridget Ekstrom, Managing Director, Public Finance Banker, with D.A. Davidson & Co. provided an overview of the bond issuance timeline and procedures to the Board of Trustees. Key points included:

- The Bond Finance Committee will review initial documents and updates on market conditions on October 9th.
- Official bond documents will be prepared for submission to rating agencies and the community.
- Bonds could be presented to the market as early as November 20th, with final board approval and closing scheduled before December 18<sup>th</sup>.
- This issuance represents the first series of authorized bonds, with amounts and timing to be fine-tuned based on market conditions, interest rates, and internal timelines.
- The process ensures thorough review, market readiness, and alignment with the District's financial planning.

Ms. Ekstrom addressed all questions from the Board of Trustees regarding the information presented.

## **VII. BOARD/SUPERINTENDENT COMMENTS**

The Board and Superintendent Weltz expressed appreciation for the district team's work on bond projects, noting the fast-paced timeline and goal of student occupancy by August 2028. Phased construction at some sites, particularly Helena High School, will require careful scheduling. Project updates and public communication will be maintained via the district's construction website.

**VIII. ADJOURNMENT**

Board Chair Jennifer McKee adjourned the meeting at 6:49 p.m.

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Candice Delvaux, Recording Secretary

Date

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.B.1.**

- Call To Order/Pledge of Allegiance
- Review of Agenda
- Recognitions
- Superintendent's Report
- General Public Comment
- Consent Action Items
- Items For Action
- Item For Information
- Items For Information-Facilities Bond Projects Updates
- Reports
- Upcoming Meetings
- Board/Superintendent Comments
- Adjournment

**Item Title:**      **Item For Action**  
1. Hawthorne Elementary- Request for Proposal (RFP)

Board Action	1st Motion	Second	Aye	Nay	Other
Hathhorn					
McKee					
Satre					
Murnane Butcher					
Cleatus					
Walsh					
Armstrong					
Meyer					

# **Request for Proposal (RFP)**

## **For Long-Term Lease or Purchase of Hawthorne Elementary Located at 430 Madison Avenue, Helena, MT 59601**

DEADLINE TO SUBMIT PROPOSALS: January 9, 2026 - 1:00 P.M. MDT

PROPOSALS MUST BE DELIVERED TO:

HELENA PUBLIC SCHOOLS  
ATTN: Todd Verrill  
1325 POPLAR STREET  
HELENA, MT 59601

For information concerning the RFP process, required format and the schedule of activities,  
please direct questions to:

Todd Verrill, Director of Facilities and Maintenance  
Helena Public Schools  
tverrill@helenaschools.org  
1325 Poplar Street  
Helena, MT 59601

Telephone: 406-324-1734

## Purpose and Background

The Helena Public School District, hereinafter referred to as “the District,” is soliciting proposals from qualified parties interested in either:

- **Entering into a long-term lease, or**
- **Purchasing**

**The Hawthorne Elementary School building and associated property owned by the District and located at 430 Madison Avenue, Helena, MT 59601.**

This RFP is issued in accordance with Montana Code Annotated (MCA) § 20-6-604 (sale or disposal of school property) and § 18-1-101 et seq. (public contracts). The intent is to ensure fair, transparent, and competitive consideration of proposals that meet both statutory requirements and the best interests of the District and the public.

HPS will **not** consider proposals for entities providing PreK-12 educational services, incarceration or detention center use, pre-release center services, drug rehabilitation services, gaming establishments, homeless shelter, any establishments serving alcohol or any retail sales of alcohol, tobacco or marijuana.

If the proposal is to lease the building, HPS will consider leasing the entire building only. The HPS Board of Trustees reserves the right to negotiate terms of the lease before any agreement is put into effect and reserves the right to refuse or reject any and all proposals.

If the proposal is to lease the building, HPS reserves the right to select tenants that best fit the overall objectives of HPS regarding compatible use, longevity and economic benefit.

Any proposal for the sale of the Hawthorne Elementary property is subject to the requirements of Montana law for the sale of school property. No sale can be completed until the process required for the sale of the property has completed in accordance with law.

## Property Description and Availability for Inspection

- **Property Name:** Hawthorne Elementary School
- **Physical Address:** 430 Madison Avenue, Helena, MT 59601
- **Legal Description:** S25, T10 N, R04 W, C.O.S. 3173465, HAWTHORNE SCHOOL BLOCK 1
- **Total Square Feet:** 27,261

*Additional property documentation, including floor plans and condition reports, may be obtained upon request or during scheduled site visits.*

The Property will be available for inspection by appointment from November 24, 2025, through December 19, 2025, not including weekends and holidays.

An on-site inspection of the Property should be made by all Proposers prior to submitting a proposal. A HPS representative may accompany the Proposer on said inspection. Proposers shall verify dimensions of the Property. Failure of the Proposers to visit and evaluate any special conditions, or to verify measurements, shall not relieve the successful Proposer of the responsibility of fulfilling the sale or lease agreement in accordance with the award.

Upon request, HPS will make available any reports or assessments related to the facility.

Site visits can be arranged with Wynter Banks at 406-324-1723 or [wbanks@helenaschools.org](mailto:wbanks@helenaschools.org).

## Scope of Proposal

Proposers may submit a response for:

- **Option A – Long-Term Lease**  
Include proposed lease term (minimum 5 years), annual rental rate, escalation terms, maintenance responsibilities, and intended use.
- **Option B – Purchase**  
Include proposed purchase price, earnest money deposit (if any), proof of financing, and intended use.

## RFP Timeline

	<u>Activity</u>	<u>Date</u>
1.	Advertisement	Nov. 15, 2025 – Jan. 3, 2026
2.	Property available for inspection Not including weekends and holidays	Nov. 24, 2025 – Dec. 19, 2025
3.	Deadline for Questions	Jan. 9, 2026
4.	Distributions of RFP Amendments (if needed)	Ongoing
5.	Deadline to Submit Proposals	Jan. 9, 2026 at 1:00 p.m.
6.	Proposal Opening	Jan. 12, 2026 at 1:00 p.m. Lincoln Center 1325 Poplar St
7.	Notice of Intent to Award	Jan. 20, 2026
8.	Board of Trustees Acceptance Subject to postponement if additional information needed.	Feb. 10, 2026

If the Board of Trustees accepts an offer to purchase the Hawthorne Elementary property, closing of the sale will occur with sufficient time following acceptance to permit completion of required processes by law.

## **Proposal Requirements**

Each proposal must include the following:

1. Cover Letter
2. Table of Contents
3. Entity Information (name, address, legal status, key personnel)
4. Experience and Qualifications
5. Proposal Option(s):
  - o Lease Terms, Lease History, Proposed Improvements or Modifications (if applicable)
  - o Purchase Offer (if applicable)
6. Intended Use Plan for Building
7. Proof of Financial Capacity
8. References (at least 3)
9. Any Contingencies or Conditions
10. Other

## **Format for Proposal**

Any term or condition stated in this RFP shall be considered accepted by the Proposer unless specifically objected to by the Proposer. HPS may accept or reject Proposer's alternative proposals to the terms of this RFP. A proposal may be rejected if it is incomplete or conditional. The following sections outline the required components of a Lease Proposal.

## **Multiple proposals**

A Proposer may submit more than one (1) proposal. To be considered, each proposal must be complete and comply with all stated instructions. However, additional proposals may be in an abbreviated form following the same format but providing only that information which differs in any way from that contained in the complete proposal.

## **Acceptance of Proposals**

HPS reserves the right in this award to consider the longevity, availability, and suitability of the Proposer, as well as usage of the Property. HPS further reserves the right to accept or reject any proposal, to waive any irregularities or informalities, and to make this award in the best interest of HPS. Neither HPS nor any agent thereof on behalf of HPS will be obligated in any way by any Proposer's response to the RFP.

## **Modification or Withdrawal of Proposals**

Any Proposer may withdraw its proposal at any time prior to the scheduled closing time for the receipt of proposals. Modifications or corrections of a previously submitted proposal, which are addressed in the same manner as the original proposal, will be considered by HPS if received prior to the scheduled closing time for receipt of proposals.

Oral or telephonic modifications or corrections will not be recognized or considered.

## **General Contractual Requirements**

It is the intent of HPS through this RFP and conditions contained herein, to establish to the greatest possible extent, complete clarity regarding the requirements of both parties to the lease agreement resulting from the RFP.

Before submitting a proposal, the Proposer shall be thoroughly familiar with all conditions referred to in this document, and any addenda issued before the proposal submission date. Such addenda shall form a part of the RFP and shall be made a part of the agreement. It shall be the Proposer's responsibility to ascertain that the proposal includes all addenda issued prior to the proposal submission date.

## **Lease Preparation and Modification of the Site**

For any lease, HPS will not provide any leasehold improvements to the Property. Proposers of a lease shall provide a description of the improvements, construction and work contemplated to be performed on the leased premises. HPS and Proposer shall agree on the interior and exterior design of the area as well as standards of construction, workmanship, materials to be used in construction and matters involving signage. A successful Proposer will make no changes without the prior written consent of HPS.

A successful Proposer of a lease acknowledges that Proposer shall meet with HPS and secure HPS's approval of Proposal's design, materials, and workmanship. The successful Proposer will build, only in accordance with such plans as are supplied to and approved by HPS.

It shall be agreed and understood that HPS shall not be obligated to make any expenditure of any nature whatsoever whether in providing funds, services or materials in connection with the work to be done by the Proposer. In addition, HPS shall not be required to expend funds, services or materials during the term of the lease agreement in connection with remodeling, upkeep or maintenance of the Property or improvements therein, other than as specifically identified in the lease agreement.

At the conclusion of the lease agreement, or any extension thereof, all improvements of every character of the leased premises shall be the property of HPS and shall not be removed by the tenant. All interests, rights and claims of the tenant in and thereto as well as all persons named by and under the tenant shall absolutely terminate upon the termination of the lease agreement

for any cause, all at no cost or expense to HPS except as hereinafter provided. Personal property of the tenant not permanently affixed to the walls, ceiling or floor of the leased area may be removed by tenant on the termination of the lease agreement or any extension thereof.

## **Proposal Deadline and Number of Copies**

To be considered for selection, proposals shall arrive at HPS by 1:00 p.m. on January 9, 2026. Five (5) hard copies and one (1) electronic copy of the Proposal shall be submitted in a sealed envelope clearly marked with the name of the Proposer and labeled “RFP – Lease of Hawthorne Elementary Property” or “RFP – Purchase of Hawthorne Elementary Property.” One (1) of the copies shall be marked “Master Copy” and will contain original signatures in all locations requiring a Proposer signature. The remaining copy does not require original signatures.

The mailing of proposals shall allow for normal mail delivery time to ensure timely receipt of the proposal by HPS. Proposals arriving after the deadline will not be considered. All proposals become the property of HPS.

The proposals must be addressed as follows:

RFP – Lease or Purchase of Hawthorne Elementary Property  
Helena Public Schools  
Attention: Todd Verrill  
1325 Poplar Street  
Helena, MT 59601

## **Proposal Opening / Oral Presentation**

Proposals will be opened at 1:00 p.m. on January 12, 2026, in the District Facilities Meeting room at 1201 Boulder Avenue, Helena, MT 59601. This is an open meeting and those submitting proposals may attend.

Proposers selected for final evaluation may be required to make an oral presentation of their proposal(s). Such presentations provide an opportunity for the Proposer to clarify their proposal to ensure mutual understanding. HPS will schedule the time and location for these presentations.

## **Evaluation Criteria**

Proposals will be evaluated on the following factors:

<b>Criterion</b>	<b>Weight</b>
Proposed Financial Terms	30%
Proposed Use and Community Benefit	25%
Experience and Qualifications	15%
Financial Capacity	15%

<b>Criterion</b>	<b>Weight</b>
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Completeness and Responsiveness of Proposal	15%
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All proposals will initially be classified as either “responsive” or “nonresponsive.” Proposals may be found nonresponsive at any time during the procurement process if any of the required information is not provided; the submitted price is found to be inadequate as measured by criteria stated in the RFP; the proposed use is incompatible or the references, experience, responsibility, reputation, financial standing of the Proposer, and the ability of the Proposer to meet the requirements of HPS. If a proposal is found to be nonresponsive, it will not be considered further.

HPS will also determine whether a Proposer has met the standards of responsibility. Such a determination may be made at any time during the procurement process if information materializes that would result in a determination of non-responsibility. If a Proposer is found non-responsible, the determination must be in writing, made a part of the procurement file and mailed to the affected Proposer.

## **Additional Information & Disclaimers**

- The property will be sold or leased **AS IS** AND IN ITS PRESENT CONDITION. HPS HAS NOT AND WILL NOT WARRANT THE PROPERTY AND WILL NOT MAKE ANY REPRESENTATION OR WARRANTY AS TO THE PRESENT OR FUTURE SUITABILITY OF THE PROPERTY FOR ANY PURCHASER’S/TENANT’S INTENDED USE AND DISCLAIMS ANY SUCH REPRESENTATIONS OR WARRANTIES TO THAT EFFECT. HPS DOES NOT MAKE ANY WARRANTY, EXPRESS OR IMPLIED, INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.
- Proposals must comply with all applicable Montana laws and regulations, including but not limited to Montana Code Annotated, Title 20, Chapter 6, Part 6 governing school property and Montana Code Annotated, Title 18 governing public contracts.
- The District may seek the advice of other professionals and consultants in evaluating proposals.

## **Questions and Clarifications**

All questions regarding this RFP must be submitted in writing by January 9, 2026, to:

Todd Verrill, Director of Facilities and Maintenance  
Helena Public Schools  
tverrill@helenaschools.org  
1325 Poplar Street  
Helena, MT 59601

All written questions or comments submitted via email or mail must include “Questions – Lease or Purchase of Hawthorne Elementary Property” in the subject line or clearly marked on the outside of the envelope.

Answers will be posted publicly at: [www.helenaschools.org](http://www.helenaschools.org).

## **Award**

HPS will review all proposals. HPS reserves the right to cancel the selection process or the negotiations of an agreement, at any time prior to entering into a formal written agreement with Proposer.

HPS intends to execute either a lease agreement or purchase and sale agreement with the Proposer submitting the proposal which HPS determines to best meet HPS’s requirements. The HPS Board of Trustees will have sole authority for the acceptance of any and all proposals.

In awarding the agreement, HPS may take into consideration the references, experience, responsibility, reputation, financial standing of the Proposer, and the ability of the Proposer to meet the requirements of HPS. The inability of any Proposer to meet these requirements may be cause for rejection of his/her proposal.

After selection, HPS will submit the recommendation to the Board of Trustees for approval and will initiate an agreement to be prepared for signatures by both parties. The agreement will be issued to the responsible Proposer whose proposal is the most advantageous to HPS.

If the Board accepts the offer to sell the property, pursuant to MCA § 20-6-604, no purchase and sale agreement may be executed until the required time has passed for the sale to be finalized.

## **News Releases**

News releases or advertising pertaining to this RFP will not be made without prior written approval of HPS and then only in coordination with HPS. A sale or lease agreement issued as a result of this RFP shall not entitle the purchaser or tenant to use the trademark, logo, seal or any copyrighted material of HPS.

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.B.2.**

- Call To Order/Pledge of Allegiance
- Review of Agenda
- Recognitions
- Superintendent's Report
- General Public Comment
- Consent Action Items
- Items For Action
- Item For Information
- Items For Information-Facilities Bond Projects Updates
- Reports
- Upcoming Meetings
- Board/Superintendent Comments
- Adjournment

**Item Title:**      **Item For Action**  
2. May Butler Center Property- Request for Proposal (RFP)

Board Action	1st Motion	Second	Aye	Nay	Other
Hathhorn					
McKee					
Satre					
Murnane Butcher					
Cleatus					
Walsh					
Armstrong					
Meyer					

# **Request for Proposal (RFP)**

**For Long-Term Lease or Purchase  
of the  
May Butler Center Property  
Located at 55 South Rodney St., Helena, MT 59601**

DEADLINE TO SUBMIT PROPOSALS: January 9, 2026 - 1:00 P.M. MDT

PROPOSALS MUST BE DELIVERED TO:

HELENA PUBLIC SCHOOLS  
ATTN: TODD VERRILL  
1325 POPLAR STREET  
HELENA, MT 59601

For information concerning the RFP process, required format, and the schedule of activities,  
please direct questions to:

Todd Verrill, Director of Facilities and Maintenance  
Helena Public Schools  
tverrill@helenaschools.org  
1325 Poplar Street  
Helena, MT 59601

Telephone: 406-324-1734

## Purpose and Background

The Helena Public School District, hereinafter referred to as “the District,” is soliciting proposals from qualified parties interested in either:

- **Entering into a long-term lease, or**
- **Purchasing**

**The May Butler building and associated property owned by the District and located at 55 South Rodney St., Helena, MT 59601.**

This RFP is issued in accordance with Montana Code Annotated (MCA) § 20-6-604 (sale or disposal of school property) and § 18-1-101 et seq. (public contracts). The intent is to ensure fair, transparent, and competitive consideration of proposals that meet both statutory requirements and the best interests of the District and the public.

HPS will **not** consider proposals for entities providing PreK-12 educational services, incarceration or detention center use, pre-release center services, drug rehabilitation services, gaming establishments, homeless shelter, any establishments serving alcohol or any retail sales of alcohol, tobacco or marijuana.

If the proposal is to lease the building, HPS will consider leasing the entire building only. The HPS Board of Trustees reserves the right to negotiate terms of the lease before any agreement is put into effect and reserves the right to refuse or reject any and all proposals.

If the proposal is to lease the building, HPS reserves the right to select tenants that best fit the overall objectives of HPS regarding compatible use, longevity and economic benefit.

Any proposal for the sale of the May Butler property is subject to the requirements of Montana law for the sale of school property. No sale can be completed until the process required for the sale of the property has completed.

## Property Description and Availability for Inspection

- **Property Name:** May Butler Center
- **Physical Address:** 55 South Rodney St., Helena, MT 59601
- **Legal Description:** HELENA TOWNSITE 1869, S31, T10 N, R03 W, BLOCK 29, Lot 12 - 17, W2 LT 18 COS #3047687
- **Total Square Feet:** 7,724 [facilities plan lists it as 9,800]

*Additional property documentation, including floor plans and condition reports, may be obtained upon request or during scheduled site visits.*

The Property will be available for inspection by appointment from November 24, 2025, through December 19, 2025, not including weekends and holidays.

An on-site inspection of the Property should be made by all Proposers prior to submitting a proposal. A HPS representative may accompany the Proposer on said inspection. Proposers shall verify dimensions of the Property. Failure of the Proposers to visit and evaluate any special conditions, or to verify measurements, shall not relieve the successful Proposer of the responsibility of fulfilling the sale or lease agreement in accordance with the award.

Upon request HPS will make available any reports or assessments related to the facility.

Site visits can be arranged with Wynter Banks at 406-324-1723 or [wbanks@helenaschools.org](mailto:wbanks@helenaschools.org).

## Scope of Proposal

Proposers may submit a response for:

- **Option A – Long-Term Lease**  
Include proposed lease term (minimum 5 years), annual rental rate, escalation terms, maintenance responsibilities, and intended use.
- **Option B – Purchase**  
Include proposed purchase price, earnest money deposit (if any), proof of financing, and intended use.

## RFP Timeline

	<u>Activity</u>	<u>Date</u>
1.	Advertisement	Nov. 15, 2025 – Jan. 3, 2026
2.	Property available for inspection Not including weekends and holidays	Nov. 24, 2025 – Dec. 19, 2025
3.	Deadline for Questions	Jan. 9, 2026
4.	Distributions of RFP Amendments (if needed)	Ongoing
5.	Deadline to Submit Proposals	Jan. 9, 2026 at 1:00 p.m.
6.	Proposal Opening	Jan. 12, 2026 at 1:00 p.m. Lincoln Center 1325 Poplar St
7.	Notice of Intent to Award	Jan. 20, 2026
8.	Board of Trustees Acceptance Subject to postponement if additional information needed.	Feb. 10, 2026

If the Board of Trustees accepts an offer to purchase the May Butler property, closing of the sale will occur with sufficient time following acceptance to permit completion of required processes by law.

## **Proposal Requirements**

Each proposal must include the following:

1. Cover Letter
2. Table of Contents
3. Entity Information (name, address, legal status, key personnel)
4. Experience and Qualifications
5. Proposal Option(s):
  - o Lease Terms, Lease History, Proposed Improvements or Modifications (if applicable)
  - o Purchase Offer (if applicable)
6. Intended Use Plan for Building
7. Proof of Financial Capacity
8. References (at least 3)
9. Any Contingencies or Conditions
10. Other

## **Format for Proposal**

Any term or condition stated in this RFP shall be considered accepted by the Proposer unless specifically objected to by the Proposer. HPS may accept or reject Proposer's alternative proposals to the terms of this RFP. A proposal may be rejected if it is incomplete or conditional. The following sections outline the required components of a Lease Proposal.

## **Multiple Proposals**

A Proposer may submit more than one (1) proposal. To be considered, each proposal must be complete and comply with all stated instructions. However, additional proposals may be in an abbreviated form following the same format but providing only that information which differs in any way from that contained in the complete proposal.

## **Acceptance of Proposals**

HPS reserves the right in this award to consider the longevity, availability, and suitability of the Proposer, as well as usage of the Property. HPS further reserves the right to accept or reject any proposal, to waive any irregularities or informalities, and to make this award in the best interest of HPS. Neither HPS nor any agent thereof on behalf of HPS will be obligated in any way by any Proposer's response to the RFP.

## **Modification or Withdrawal of Proposals**

Any Proposer may withdraw its proposal at any time prior to the scheduled closing time for the receipt of proposals. Modifications or corrections of a previously submitted proposal, which are addressed in the same manner as the original proposal, will be considered by HPS if received prior to the scheduled closing time for receipt of proposals.

Oral or telephonic modifications or corrections will not be recognized or considered.

## **General Contractual Requirements**

It is the intent of HPS through this RFP and conditions contained herein, to establish to the greatest possible extent, complete clarity regarding the requirements of both parties to the lease agreement resulting from the RFP.

Before submitting a proposal, the Proposer shall be thoroughly familiar with all conditions referred to in this document, and any addenda issued before the proposal submission date. Such addenda shall form a part of the RFP and shall be made a part of the agreement. It shall be the Proposer's responsibility to ascertain that the proposal includes all addenda issued prior to the proposal submission date.

## **Lease Preparation and Modification of the Site**

For any lease, HPS will not provide any leasehold improvements to the Property. Proposers of a lease shall provide a description of the improvements, construction and work, contemplated to be performed on the leased premises. HPS and Proposer shall agree on the interior and exterior design of the area as well as standards of construction, workmanship, materials to be used in construction and matters involving signage. A successful Proposer will make no changes without the prior written consent of HPS.

A successful Proposer of a lease acknowledges that Proposer shall meet with HPS and secure HPS's approval of Proposal's design, materials, and workmanship. The successful Proposer will build, only in accordance with such plans as are supplied to and approved by HPS.

It shall be agreed and understood that HPS shall not be obligated to make any expenditure of any nature whatsoever whether in providing funds, services or materials in connection with the work to be done by the Proposer. In addition, HPS shall not be required to expend funds, services or materials during the term of the lease agreement in connection with remodeling, upkeep or maintenance of the Property or improvements therein, other than as specifically identified in the lease agreement.

At the conclusion of the lease agreement, or any extension thereof, all improvements of every character of the leased premises, shall be the property of HPS and shall not be removed by the tenant. All interests, rights and claims of the tenant in and thereto as well as all persons named by and under the tenant shall absolutely terminate upon the termination of the lease agreement

for any cause, all at no cost or expense to HPS except as hereinafter provided. Personal property of the tenant not permanently affixed to the walls, ceiling, or floor of the leased area may be removed by tenant on the termination of the lease agreement, or any extension thereof.

## **Proposal Deadline and Number of Copies**

To be considered for selection, proposals shall arrive at HPS by 1:00 p.m. on January 9, 2026. Five (5) hard copies and one (1) electronic copy of the Proposal shall be submitted in a sealed envelope clearly marked with the name of the Proposer and labeled “RFP – Lease of May Butler Center Property” or “RFP – Purchase of May Butler Center Property.” One (1) of the copies shall be marked “Master Copy” and will contain original signatures in all locations requiring a Proposer signature. The remaining copy does not require original signatures.

The mailing of proposals shall allow for normal mail delivery time to ensure timely receipt of the proposal by HPS. Proposals arriving after the deadline will not be considered. All proposals become the property of HPS.

The proposals must be addressed as follows:

RFP – Lease or Purchase of May Butler Center Property  
Helena Public Schools  
Attention: Todd Verrill  
1325 Poplar Street  
Helena, MT 59601

## **Proposal Opening / Oral Presentation**

Proposals will be opened at 1:00 p.m. on January 12, 2026, in the District Facilities Meeting room at 1201 Boulder Avenue. This is an open meeting and those submitting proposals may attend.

Proposers selected for final evaluation may be required to make an oral presentation of their proposal(s). Such presentations provide an opportunity for the Proposer to clarify their proposal to ensure mutual understanding. HPS will schedule the time and location for these presentations.

## **Evaluation Criteria**

Proposals will be evaluated on the following factors:

<b>Criterion</b>	<b>Weight</b>
Proposed Financial Terms	30%
Proposed Use and Community Benefit	25%
Experience and Qualifications	15%
Financial Capacity	15%

<b>Criterion</b>	<b>Weight</b>
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Completeness and Responsiveness of Proposal	15%
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All proposals will initially be classified as either “responsive” or “nonresponsive.” Proposals may be found nonresponsive at any time during the procurement process if any of the required information is not provided; the submitted price is found to be inadequate as measured by criteria stated in the RFP; the proposed use is incompatible or the references, experience, responsibility, reputation, financial standing of the Proposer, and the ability of the Proposer to meet the requirements of HPS. If a proposal is found to be nonresponsive, it will not be considered further.

HPS will also determine whether a Proposer has met the standards of responsibility. Such a determination may be made at any time during the procurement process if information materializes that would result in a determination of non-responsibility. If a Proposer is found non-responsible, the determination must be in writing, made a part of the procurement file and mailed to the affected Proposer.

## **Additional Information & Disclaimers**

- The property will be sold or leased **AS IS** AND IN ITS PRESENT CONDITION. HPS HAS NOT AND WILL NOT WARRANT THE PROPERTY AND WILL NOT MAKE ANY REPRESENTATION OR WARRANTY AS TO THE PRESENT OR FUTURE SUITABILITY OF THE PROPERTY FOR ANY PURCHASER’S/TENANT’S INTENDED USE AND DISCLAIMS ANY SUCH REPRESENTATIONS OR WARRANTIES TO THAT EFFECT. HPS DOES NOT MAKE ANY WARRANTY, EXPRESS OR IMPLIED, INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.
- Proposals must comply with all applicable Montana laws and regulations, including but not limited to Montana Code Annotated, Title 20, Chapter 6, Part 6 governing school property and Montana Code Annotated, Title 18 governing public contracts.
- The District may seek the advice of other professionals and consultants in evaluating proposals.

## **Questions and Clarifications**

All questions regarding this RFP must be submitted in writing by January 9, 2026, to:

Todd Verrill, Director of Facilities and Maintenance  
Helena Public Schools  
tverrill@helenaschools.org  
1325 Poplar Street  
Helena, MT 59601

All written questions or comments submitted via email or mail must include “Questions – Lease or Purchase of May Butler Property” in the subject line or clearly marked on the outside of the envelope.

Answers will be posted publicly at: [www.helenaschools.org](http://www.helenaschools.org).

## **Award**

HPS will review all proposals. HPS reserves the right to cancel the selection process or the negotiations of an agreement, at any time prior to entering into a formal written agreement with Proposer.

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## **News Releases**

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**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.C.1.**

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:      Item For Information**  
1. Enrollment Update

## Enrollment by Site: 10/6/2025

(NOT ANB count)	Fall 2025	Difference
Site	Site Totals	Fall 2025 minus FALL 2024

Broadwater (includes Montessori)	248	-19
Four Georgians	478	9
Jim Darcy	457	-11
Kessler	281	46
Rossiter	359	-8
Bryant	256	-26
Central (includes Montessori)	407	91
Jefferson	250	7
Smith (includes Montessori)	299	23
Warren	262	-12
Mount Ascension K-5	48	-1
pK-5 subtotal	3345	-82

CRA	932	-36
HMS	723	18
Mount Ascension 6-8	37	-16
6-8 subtotal	1692	-34

CHS	1363	56
HHS	970	-16
PAL Charter	62	4
Mount Ascension 9-12	105	40
9-12 subtotal	2500	84

Total Enrolled at Site (NOT ANB)	7537	-32
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Last years Fall Enrollment total = 7569  
 Last years pK-5 Fall Enrollment total = 3427  
 Last years 6-8 Fall Enrollment total = 1726  
 Last years 9-12 Fall Enrollment total = 2416



# Fall Student Count For ANB Summary By District

## October 6, 2025 Enrollment

County: 25 Lewis & Clark  
 District: 0487 Helena Elem

School Year: 2025-2026  
 Budget Unit: E1 E2 E3 M1  
 M2

### SCHOOLS IN THIS DISTRICT

0651	Jefferson School
0654	Central School
0655	Broadwater School
0657	Bryant School
0662	Kessler Elementary School
0663	Warren School
1461	Jim Darcy School
1477	Smith School
1478	Rossiter School
1582	Four Georgians School
1614	Helena Middle School
1615	C R Anderson Middle Schl
3022	Helena Montessori Charter Schl
3023	Mount Ascension Learning Ac EL
3024	Mount Ascension Learning Ac MS

### TOTAL STUDENT COUNT FOR ANB BY GRADE - DISTRICT

Grade	<u>Fall Students</u>
Early Targeted Intervention E1	141
Sped PK E1	11
Kindergarten E1	409
1st Grade E1	471
2nd Grade E1	483
3rd Grade E1	467
4th Grade E1	597
5th Grade E1	509
6th Grade E1	568
<b>E1 Total</b>	<b><u><u>3,656</u></u></b>

\* Used to calculate FY2026-2027 budget limits



# Fall Student Count For ANB Summary By District

## October 6, 2025 Enrollment

### TOTAL STUDENT COUNT FOR ANB BY GRADE - DISTRICT

Grade	Fall Students
1st Grade E2	11
2nd Grade E2	7
3rd Grade E2	10
4th Grade E2	9
5th Grade E2	11
6th Grade E2	14
<b>E2 Total</b>	<b>62</b>
Kindergarten E3	36
1st Grade E3	36
2nd Grade E3	36
3rd Grade E3	35
4th Grade E3	36
5th Grade E3	37
<b>E3 Total</b>	<b>216</b>
7th Grade M1	565
8th Grade M1	522
<b>M1 Total</b>	<b>1,087</b>
7th Grade M2	6
8th Grade M2	17
<b>M2 Total</b>	<b>23</b>
<b>District Total:</b>	<b>5,044</b>

### PART-TIME STUDENTS - DISTRICT

		Not Counted For ANB < 180 hrs/yr	Parttime Count 180-359 hrs/yr	Parttime Count 360-539 hrs/yr	Parttime Count 540-719 hrs/yr
1st - 6 Grades E1	Fall	2	4	3	0
Sped PK E1	Fall	0	11	0	0
1st - 6 Grades E2	Fall	1	58	2	1
7-8 Grade M1	Fall	1	0	2	0

\* Used to calculate FY2026-2027 budget limits



# Fall Student Count For ANB Summary By District

## October 6, 2025 Enrollment

### PART-TIME STUDENTS - DISTRICT

		Not Counted For ANB < 180 hrs/yr	Parttime Count 180-359 hrs/yr	Parttime Count 360-539 hrs/yr	Parttime Count 540-719 hrs/yr
7-8 Grade M2	Fall	0	14	3	0

Students who turned 19 on or before September 10, 2025 are not included in part-time students counted for ANB, unless the student meets the requirements for inclusion as stated in 20-9-311 (7)(c).

### OTHER STUDENT COUNTS FOR ANB - DISTRICT

Student Count Type	Fall	Winter	Spring
Ed Savings Account E2	1	0	0
Ed Savings Account M1	2	0	0

### Student Achievement Gap

American Indian Students Counted For The FY2027 American Indian Achievement Gap Payment 338

### STUDENTS COUNTED FOR ANB EXTRACURRICULAR PARTICIPATION

	6 week (1/16)		18+ week (1/8)
HELENA K-6 E1	1		0
HELENA 7-8 M1	2		0
	3		0

Note: This is a count of the extracurricular activities completed in the prior school year, not a count of students.

\* Used to calculate FY2026-2027 budget limits



# Fall Student Count For ANB Summary By District

## October 6, 2025 Enrollment

### JUMPSTART COUNTS FOR ANB - DISTRICT

The Jumpstart program takes place during summer break between the end of one year and the start of the next school year preceding a child's entry into kindergarten, 1st grade, 2nd grade, or 3rd grade. The program is at least 4 weeks in duration and provides at least 120 instructional hours. A pupil who participates in a Jumpstart program may be counted for ANB purposes.

A district shall add one-quarter enrollment for a student who participates in Jumpstart to the pupil's regular enrollment count in both the Fall and Spring enrollment counts following the pupil's participation in the Jumpstart program.

<b>Grade</b>	<b>Count</b>
Kindergarten	<u>28</u>
1st Grade	<u>24</u>
2nd Grade	<u>29</u>
3rd Grade	<u>22</u>

\* Used to calculate FY2026-2027 budget limits



# Fall Student Count For ANB Summary By District

## October 6, 2025 Enrollment

County: 25 Lewis & Clark  
 District: 0488 Helena H S

School Year: 2025-2026  
 Budget Unit: H1 H2 H3

### SCHOOLS IN THIS DISTRICT

0661	Helena High School
1547	Capital High School
3025	Mount Ascension Learning Ac HS
3026	Helena P.A.L.

### TOTAL STUDENT COUNT FOR ANB BY GRADE - DISTRICT

Grade	Fall Students
9th Grade H1	630
10th Grade H1	594
11th Grade H1	572
12th Grade H1	537
<b>H1 Total</b>	<b>2,333</b>
9th Grade H2	11
10th Grade H2	46
11th Grade H2	20
12th Grade H2	28
<b>H2 Total</b>	<b>105</b>
9th Grade H3	4
10th Grade H3	3
11th Grade H3	26
12th Grade H3	29
<b>H3 Total</b>	<b>62</b>
<b>District Total:</b>	<b>2,500</b>

### PART-TIME STUDENTS - DISTRICT

		Not Counted For ANB < 180 hrs/yr	Parttime Count 180-359 hrs/yr	Parttime Count 360-539 hrs/yr	Parttime Count 540-719 hrs/yr
9-12 Grade H1	Fall	0	1	39	38

\* Used to calculate FY2026-2027 budget limits



# Fall Student Count For ANB Summary By District

## October 6, 2025 Enrollment

### PART-TIME STUDENTS - DISTRICT

		Not Counted For ANB < 180 hrs/yr	Parttime Count 180-359 hrs/yr	Parttime Count 360-539 hrs/yr	Parttime Count 540-719 hrs/yr
9-12 Grade H2	Fall	0	34	28	0

Students who turned 19 on or before September 10, 2025 are not included in part-time students counted for ANB, unless the student meets the requirements for inclusion as stated in 20-9-311 (7)(c).

### OTHER STUDENT COUNTS FOR ANB - DISTRICT

Student Count Type	Fall	Winter	Spring
19 Year Olds H1	2	0	0
Ed Savings Account H1	1	0	0
MT Youth ChalleNGe H1	3	0	0
MT Youth ChalleNGe H3	1	0	0

### Student Achievement Gap

American Indian Students Counted For The FY2027 American Indian Achievement Gap Payment 129

### STUDENTS COUNTED FOR ANB EXTRACURRICULAR PARTICIPATION

	6 week (1/16)	18+ week (1/8)
HELENA HS 9-12 H1	11	9
	11	9

Note: This is a count of the extracurricular activities completed in the prior school year, not a count of students.

\* Used to calculate FY2026-2027 budget limits



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark  
District: 0487 Helena Elem  
School: 0651 Jefferson School

School Year: 2025-2026  
Lowest Grade: PK  
Highest Grade: 5  
Budget Unit: E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

<u>Grade</u>	<u>Fall</u>
Early Targeted Intervention E1	18
Kindergarten E1	36
1st Grade E1	40
2nd Grade E1	39
3rd Grade E1	39
4th Grade E1	42
5th Grade E1	36
<b>School Total</b>	<b>250</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

**County:** 25 Lewis & Clark  
**District:** 0487 Helena Elem  
**School:** 0654 Central School

**School Year:** 2025-2026  
**Lowest Grade:** PK  
**Highest Grade:** 5  
**Budget Unit:** E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
Sped PK E1	2
Kindergarten E1	46
1st Grade E1	48
2nd Grade E1	51
3rd Grade E1	58
4th Grade E1	57
5th Grade E1	66
<b>School Total</b>	<b>328</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
Sped PK E1		0	2	0	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark  
District: 0487 Helena Elem  
School: 0655 Broadwater School

School Year: 2025-2026  
Lowest Grade: PK  
Highest Grade: 5  
Budget Unit: E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

<u>Grade</u>	<u>Fall</u>
Kindergarten E1	29
1st Grade E1	30
2nd Grade E1	31
3rd Grade E1	19
4th Grade E1	51
5th Grade E1	29
<b>School Total</b>	<b>189</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

**County:** 25 Lewis & Clark  
**District:** 0487 Helena Elem  
**School:** 0657 Bryant School

**School Year:** 2025-2026  
**Lowest Grade:** PK  
**Highest Grade:** 5  
**Budget Unit:** E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
Sped PK E1	2
Early Targeted Intervention E1	17
Kindergarten E1	24
1st Grade E1	35
2nd Grade E1	39
3rd Grade E1	37
4th Grade E1	58
5th Grade E1	44
<b>School Total</b>	<b>256</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
Sped PK E1		0	2	0	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark	School Year: 2025-2026
District: 0487 Helena Elem	Lowest Grade: PK
School: 0662 Kessler Elementary School	Highest Grade: 5
	Budget Unit: E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
Sped PK E1	1
Early Targeted Intervention E1	18
Kindergarten E1	34
1st Grade E1	43
2nd Grade E1	45
3rd Grade E1	40
4th Grade E1	53
5th Grade E1	49
<b>School Total</b>	<b>283</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
1st - 6 Grades E1		0	2	0	0
Sped PK E1		0	1	0	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark	School Year: 2025-2026
District: 0487 Helena Elem	Lowest Grade: PK
School: 0663 Warren School	Highest Grade: 5
	Budget Unit: E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
Sped PK E1	1
Early Targeted Intervention E1	18
Kindergarten E1	33
1st Grade E1	34
2nd Grade E1	39
3rd Grade E1	44
4th Grade E1	51
5th Grade E1	42
<b>School Total</b>	<b>262</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

		Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
	Fall	0	1	0	0
Sped PK E1		0	1	0	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark	School Year: 2025-2026
District: 0487 Helena Elem	Lowest Grade: PK
School: 1461 Jim Darcy School	Highest Grade: 5
	Budget Unit: E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
Sped PK E1	2
Kindergarten E1	63
1st Grade E1	75
2nd Grade E1	76
3rd Grade E1	76
4th Grade E1	85
5th Grade E1	83
<b>School Total</b>	<b>460</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
Sped PK E1		0	2	0	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

**County:** 25 Lewis & Clark  
**District:** 0487 Helena Elem  
**School:** 1477 Smith School

**School Year:** 2025-2026  
**Lowest Grade:** PK  
**Highest Grade:** 5  
**Budget Unit:** E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
Sped PK E1	1
Early Targeted Intervention E1	17
Kindergarten E1	28
1st Grade E1	41
2nd Grade E1	35
3rd Grade E1	34
4th Grade E1	38
5th Grade E1	28
<b>School Total</b>	<b>222</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
Sped PK E1		0	1	0	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark  
District: 0487 Helena Elem  
School: 1478 Rossiter School

School Year: 2025-2026  
Lowest Grade: PK  
Highest Grade: 5  
Budget Unit: E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

<u>Grade</u>	<u>Fall</u>
Early Targeted Intervention E1	36
Kindergarten E1	52
1st Grade E1	45
2nd Grade E1	51
3rd Grade E1	45
4th Grade E1	78
5th Grade E1	52
<b>School Total</b>	<b>359</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County:	25 Lewis & Clark	School Year:	2025-2026
District:	0487 Helena Elem	Lowest Grade:	PK
School:	1582 Four Georgians School	Highest Grade:	5
		Budget Unit:	E1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
Sped PK E1	2
Early Targeted Intervention E1	17
Kindergarten E1	64
1st Grade E1	80
2nd Grade E1	77
3rd Grade E1	75
4th Grade E1	84
5th Grade E1	80
<b>School Total</b>	<b>479</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
1st - 6 Grades E1		0	2	0	0
Sped PK E1		0	2	0	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County:	25 Lewis & Clark	School Year:	2025-2026
District:	0487 Helena Elem	Lowest Grade:	6
School:	1614 Helena Middle School	Highest Grade:	8
		Budget Unit:	E1, M1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
6th Grade E1	247
7th Grade M1	257
8th Grade M1	219
<b>School Total</b>	<b>723</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
7-8 Grade M1		0	0	1	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.

### STUDENTS COUNTED FOR ANB EXTRACURRICULAR PARTICIPATION

	6 week (1/16)	18+ week (1/8)
HELENA 7-8 M1	2	0
HELENA K-6 E1	1	0
	3	0

Note: This is a count of the extracurricular activities completed in the prior school year, not a count of students.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark	School Year: 2025-2026
District: 0487 Helena Elem	Lowest Grade: 6
School: 1615 C R Anderson Middle Schl	Highest Grade: 8
	Budget Unit: E1, M1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
6th Grade E1	321
7th Grade M1	308
8th Grade M1	303
<b>School Total</b>	<b>932</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
1st - 6 Grades E1		2	0	3	0
7-8 Grade M1		1	0	1	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.

### OTHER STUDENT COUNT FOR ANB-SCHOOL

Student Count Type	Fall
Ed Savings Account M1	2



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark      School Year: 2025-2026  
District: 0487 Helena Elem      Lowest Grade: K  
School: 3022 Helena Montessori Charter Schl      Highest Grade: 5  
Budget Unit: E3

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

<u>Grade</u>	<u>Fall</u>
Kindergarten E3	36
1st Grade E3	36
2nd Grade E3	36
3rd Grade E3	35
4th Grade E3	36
5th Grade E3	37
<b>School Total</b>	<u><u>216</u></u>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County:	25 Lewis & Clark	School Year:	2025-2026
District:	0487 Helena Elem	Lowest Grade:	K
School:	3023 Mount Ascension Learning Ac EL	Highest Grade:	5
		Budget Unit:	E2

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
1st Grade E2	11
2nd Grade E2	7
3rd Grade E2	10
4th Grade E2	9
5th Grade E2	11
<b>School Total</b>	<b>48</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
1st - 6 Grades E2	0	0	48	0	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County:	25 Lewis & Clark	School Year:	2025-2026
District:	0487 Helena Elem	Lowest Grade:	6
School:	3024 Mount Ascension Learning Ac MS	Highest Grade:	8
		Budget Unit:	E2, M2

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
6th Grade E2	14
7th Grade M2	6
8th Grade M2	17
<b>School Total</b>	<b>37</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
1st - 6 Grades E2		1	10	2	1
7-8 Grade M2		0	14	3	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.

### OTHER STUDENT COUNT FOR ANB-SCHOOL

Student Count Type	Fall
Ed Savings Account E2	1



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County: 25 Lewis & Clark	School Year: 2025-2026
District: 0488 Helena H S	Lowest Grade: 9
School: 0661 Helena High School	Highest Grade: 12
	Budget Unit: H1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
9th Grade H1	255
10th Grade H1	246
11th Grade H1	247
12th Grade H1	222
<b>School Total</b>	<b>970</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
9-12 Grade H1	0	0	17	2

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.

### OTHER STUDENT COUNT FOR ANB-SCHOOL

Student Count Type	Fall
19 Year Olds H1	1
MT Youth ChalleNGe H1	3

### STUDENTS COUNTED FOR ANB EXTRACURRICULAR PARTICIPATION

	6 week (1/16)	18+ week (1/8)
HELENA HS 9-12 H1	0	9
	0	9

Note: This is a count of the extracurricular activities completed in the prior school year, not a count of students.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County:	25 Lewis & Clark	School Year:	2025-2026
District:	0488 Helena H S	Lowest Grade:	9
School:	1547 Capital High School	Highest Grade:	12
		Budget Unit:	H1

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
9th Grade H1	375
10th Grade H1	348
11th Grade H1	325
12th Grade H1	315
<b>School Total</b>	<b>1,363</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

		Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
Fall		0	1	22	36
9-12 Grade H1		0	1	22	36

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.

### OTHER STUDENT COUNT FOR ANB-SCHOOL

Student Count Type	Fall
19 Year Olds H1	1
Ed Savings Account H1	1

### STUDENTS COUNTED FOR ANB EXTRACURRICULAR PARTICIPATION

	6 week (1/16)	18+ week (1/8)
HELENA HS 9-12 H1	11	0
	11	0

Note: This is a count of the extracurricular activities completed in the prior school year, not a count of students.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

County:	25 Lewis & Clark	School Year:	2025-2026
District:	0488 Helena H S	Lowest Grade:	9
School:	3025 Mount Ascension Learning Ac HS	Highest Grade:	12
		Budget Unit:	H2

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
9th Grade H2	11
10th Grade H2	46
11th Grade H2	20
12th Grade H2	28
<b>School Total</b>	<b>105</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### STUDENTS COUNTED FOR ANB WHO ATTEND PART-TIME -SCHOOL

	Fall	Not Counted For ANB <180	Part-time Count 180-359 hrs/yr	Part-time Count 360-539 hrs/yr	Part-time Count 540-719 hrs/yr
9-12 Grade H2	Fall	0	34	28	0

Students who turned 19 on or before September 10, 2025 are not included in part-time student count for ANB.



# Fall Student Count For ANB Summary By School

## October 06, 2025 Enrollment

**County:** 25 Lewis & Clark  
**District:** 0488 Helena H S  
**School:** 3026 Helena P.A.L.

**School Year:** 2025-2026  
**Lowest Grade:** 9  
**Highest Grade:** 12  
**Budget Unit:** H3

### TOTAL STUDENT COUNT FOR ANB BY GRADE - SCHOOL

Grade	Fall
9th Grade H3	4
10th Grade H3	3
11th Grade H3	26
12th Grade H3	29
<b>School Total</b>	<b>62</b>

Students who turned 19 on or before September 10, 2025 are included in the total student count for ANB by grade.

### OTHER STUDENT COUNT FOR ANB-SCHOOL

Student Count Type	Fall
MT Youth ChalleNGe H3	1

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item VI.D.1.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:       Item For Information- Facilities Bond Projects Updates**  
1. Moody's Bond Rating Update

# Helena Elementary and High School Districts

## General Obligation School Building Bonds, Series 2025

### ➤ PRELIMINARY FINANCING TIME SCHEDULE ◀

SEPTEMBER 2025						
SU	M	T	W	TH	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

OCTOBER 2025						
SU	M	T	W	TH	F	S
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

NOVEMBER 2025						
SU	M	T	W	TH	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

DECEMBER 2025						
SU	M	T	W	TH	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

<i>DATE</i>	<i>ACTION</i>	<i>PARTY</i>
September 9	• <b>Bond Elections Pass!</b> The 60-day window before we lock rates will end on <b>November 8</b>	Districts
September 24	• <b>BOARD MEETING</b> – The Board adopts Resolutions Authorizing Issuance of the Bonds as prepared by Dorsey & Whitney as Bond Counsel (DW) that names the Bond Finance Committee	All
October 1	• Send first Draft Preliminary Official Statement (POS) to the Districts and Dorsey for Review (Comments back by October 8)	DAD
October 9	• Send second Draft POS for Review • Review Moody’s Rating/Insurance Power Point Presentation, POS, Bond Resolution and Due Diligence Checklist ( <b>Bond Finance Committee</b> ) (1:00-2:30)	DAD DAD/District
October 10	• Distribute Insurance and Rating Information (Draft POS, Audit Reports and Budget) to Moody’s and Insurers to commence insurance and rating process	DAD
October 14	• <b>BOARD MEETING</b> – Bond Update	All
October 27	• Hold Moody’s Rating Meeting from (1:00-2:30) ( <b>Bond Finance Committee</b> ) and analysts from the Moody’s)	Districts/DAD
November 3	• Receive Moody’s Bond Ratings and Insurance Quotes	Districts/DAD
November 4	• <b>Bond Finance Committee</b> – Bond Issue Update and Review of Municipal Bond Insurance quotes (7:30-8:00 am)	Districts/DAD
November 5	• Print and Distribute POS/Marketing Materials to prospective investors • Send Tombstone Bond Advertisement announcing the Bond purchase opportunity to <i>The Independent Record</i> and other publications	DAD/Districts DAD/Districts
<b>November 10</b>	• Bond Issue Preliminary Pricing Meeting to discuss Bond Market and Bond information with <b>Bond Finance Committee</b> (1:00-2:30)	DAD/Districts
<b>November 11</b>	• <b>BOARD MEETING</b> – Bond Update	All
November 19	• Update Meeting of Bond Issue Pricing to discuss Bond Market and Bond information with <b>Bond Finance Committee</b> (1:00-2:00)	DAD/Districts
<b>November 20</b>	• <b>OFFER Bonds to Individual Investors, Banks, and Other Purchasers</b> • <b>Bond Finance Committee</b> Finalizes Bond Rates/Terms with DAD (1:00) • <b>Execute Bond Purchase Agreement (BPA) (1:00)</b> • <b>Distribute Final Financing Schedules to all Parties</b>	DAD DAD/Districts DAD/Districts DAD
December 2	• Distribute Closing Documents • Distribute Closing Instructions • Coordinate Investment of Proceeds	DW DAD Districts
<b>December 9</b>	• <b>BOARD MEETING</b> - Board adopts final Bond Resolutions	All
December 18	• Closing/Delivery of Bond Proceeds	All

**CREDIT OPINION**

4 November 2025



Send Your Feedback

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# Helena School District 1, MT

## Update to credit analysis

**Summary**

[Helena School District 1, MT's](#) (A1 issuer and GOULT) credit profile incorporates the district's stable local economy, with strong property wealth and average resident income. Districtwide enrollment, including both the elementary and high school districts, is projected to remain flat due to lower birth rates. The district's finances are expected to remain stable but slightly below nationally rated peers. Leverage and fixed costs are expected to remain elevated as the district still has unissued authorized debt for both its elementary and high school districts that it plans to issue in the next few years.

**Credit strengths**

- » Growing tax base with strong full value per capita
- » Stable financial profile, additional flexibility with funds outside the general fund
- » Solid community support

**Credit challenges**

- » Elevated leverage compared to medians inclusive of authorized and unissued debt
- » Moderate taxpayer concentration

**Rating outlook**

We do not assign outlooks to local government with this amount of debt outstanding.

**Factors that could lead to an upgrade**

- » Sustained reduction in leverage to materially below 400% of revenues
- » Ability to maintain current reserve and liquidity levels on a sustained basis

**Factors that could lead to a downgrade**

- » Significant increases in leverage and fixed costs beyond current expectations
- » Accelerated enrollment declines absent commensurate expenditure reductions
- » Material weakening of the district's financial position

## Key indicators

Exhibit 1

### Helena School District 1, MT

	2021	2022	2023	2024	A Medians
<b>Economy</b>					
Resident income	106.9%	108.1%	106.6%	N/A	95.7%
Full value (\$000)	N/A	\$7,678,730	\$7,803,996	\$10,754,528	\$1,315,322
Population	58,593	59,619	60,771	N/A	14,266
Full value per capita	N/A	\$128,797	\$128,416	N/A	\$95,408
Enrollment	7,773	7,683	7,801	7,607	1,838
Enrollment trend	N/A	N/A	-1.0%	-0.7%	-1.4%
<b>Financial performance</b>					
Operating revenue (\$000)	\$63,371	\$63,491	\$63,949	\$65,910	\$31,151
Available fund balance (\$000)	\$13,093	\$14,687	\$12,946	\$13,304	\$7,998
Net cash (\$000)	\$13,049	\$14,157	\$12,884	\$13,314	\$8,915
Available fund balance ratio	20.7%	23.1%	20.2%	20.2%	26.4%
Net cash ratio	20.6%	22.3%	20.1%	20.2%	32.5%
<b>Leverage</b>					
Debt (\$000)	\$62,284	\$59,569	\$56,546	\$53,164	\$23,604
ANPL (\$000)	\$242,359	\$214,097	\$173,363	\$155,708	\$48,858
OPEB (\$000)	\$3,489	\$3,567	\$4,055	\$4,075	\$3,281
Long-term liabilities ratio	486.2%	436.7%	365.9%	323.1%	316.8%
Implied debt service (\$000)	\$4,651	\$4,369	\$4,160	\$3,928	\$1,599
Pension tread water (\$000)	\$6,103	\$4,691	\$5,884	\$5,790	\$883
OPEB contributions (\$000)	\$271	\$1,392	\$262	\$303	\$148
Fixed-costs ratio	17.4%	16.5%	16.1%	15.2%	10.6%

For definitions of the metrics in the table above please refer to the [US K-12 Public School Districts Methodology](#) or see the Glossary in the Appendix below. Metrics represented as N/A indicate the data were not available at the time of publication. The medians come from our most recently published [K12 Median Report](#).

Sources: US Census Bureau, Helena School District 1, MT's financial statements and Moody's Ratings. The table reflects the HSD tax base as the ESD tax base overlaps the HSD's tax base and combined enrollment.

## Profile

Located in Lewis and Clark County, Helena School District 1 includes School District No 1 and High School District No 1, and encompasses the City of Helena and portions of the surrounding area. As of 2025, the elementary and high school districts have estimated enrollments of 5,279 students and 2,461 students, respectively. They are separate legal and financial entities, but have combined financial reporting and share a common administration and board (with one additional member for the high school district).

## Detailed credit considerations

The district benefits from its location in the City of Helena, the state capital, that will continue to stabilize the district's local economy. Tourism is also a growing contributor to the local economy given the wide range of recreational opportunities. Property wealth is strong at \$218,125 per capita, and resident incomes are average at approximately 106.6%. While enrollment declined during the pandemic, it has since stabilized and is projected to remain flat. Districts in Montana benefit from a funding formula that effectively holds them harmless from single-year declines in enrollment.

While the tax bases are not equal, the ESD's tax base is nonetheless large, and makes up about 93% of the HSD's tax base size. The tax bases of the district are somewhat concentrated with top 10 taxpayers making up 19.4% for the High school district tax base and top 10 taxpayers comprising about 17.9% of the Elementary tax base. The single largest taxpayer, Northwestern Energy, a utility company, makes up about 11.6% for the HSD tax base and about 10.3% of the ESD tax base.

Finances are expected to remain sound over the near term and close to current levels supported by the stable state funding environment, the hold harmless enrollment provision in state funding and prudent budget management. Under Montana State statutes, districts are funded at the greater of the prior three-year average number belonging (ANB) or the current year ANB.

This publication does not announce a credit rating action. For any credit ratings referenced in this publication, please see the issuer/deal page on <https://ratings.moody.com> for the most updated credit rating action information and rating history.

Additionally, the stability in state funding provides for a good framework to maintain relatively stable finances despite a rather low statewide cap of 10% general fund balance.

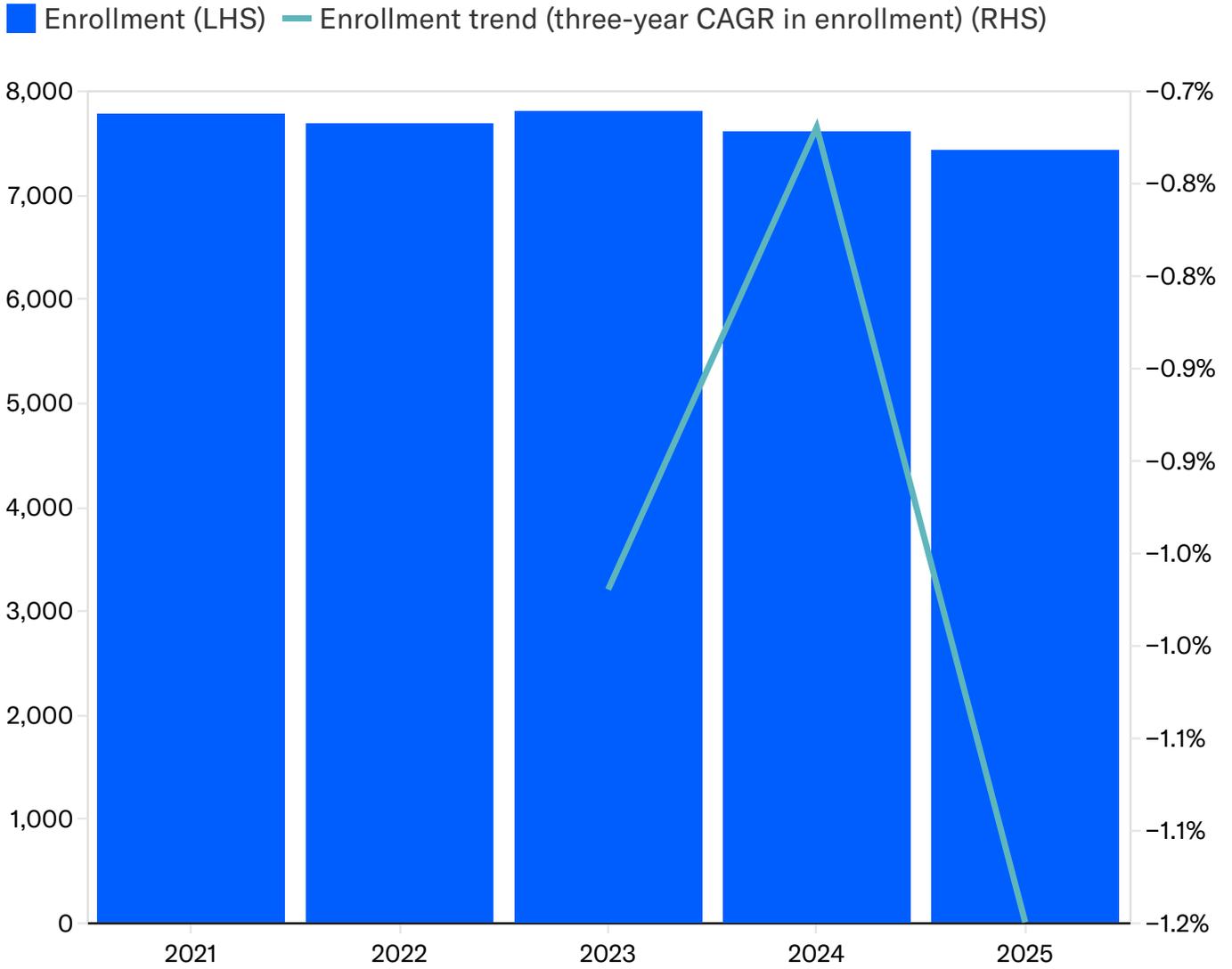
The district ended fiscal 2024 with an available general fund balance of approximately \$13.3 million, representing 20.2% of revenues, with reserves expected to remain stable and in line with current levels in fiscal 2025. A large source of financial flexibility for the district is the interlocal fund (included in the general fund) which is shared between the Elementary (ESD) and the High school district (HSD) through a Multidistrict Agreement. The current agreement is in effect from fiscal years 2025 through fiscal 2027. The use of the funds must be agreed upon by both the ESD and HSD as established in the Multidistrict Agreement and the district's budget.

Additional operational flexibility is provided by internally designated balances. The district's revenues are also supplemented by two voter-approved levies: a perpetual technology levy (\$520,500 for elementary, \$559,500 for high school) and a 10-year building reserve levy (\$3 million annually for the elementary district and \$1,500,000 annually for the high school district, including the 2023 increases, for a total of \$4.5 million per year). These levies provide financial flexibility and reflect solid community support.

The district's leverage, including combined debt and new issuances, adjusted net pension and OPEB liabilities, is elevated at 563.9% of revenue, exceeding the national median for the rating category. Leverage is likely to remain high due to authorized but unissued debt for both the Elementary and High School Districts in the amount of \$11.5 million (ESD) and \$110 million (HSD) respectively, that will be issued in the next few years. Fixed costs are above average at 15.2% of fiscal 2024. The district participates in Montana's Teachers' and Public Employees' Retirement Systems. The district's Moody's adjusted net pension liability is \$155.7 million (2.3x revenue) in 2024 with a moderate OPEB liability of about \$4 million, reflecting retiree-paid health insurance coverage.

Exhibit 2

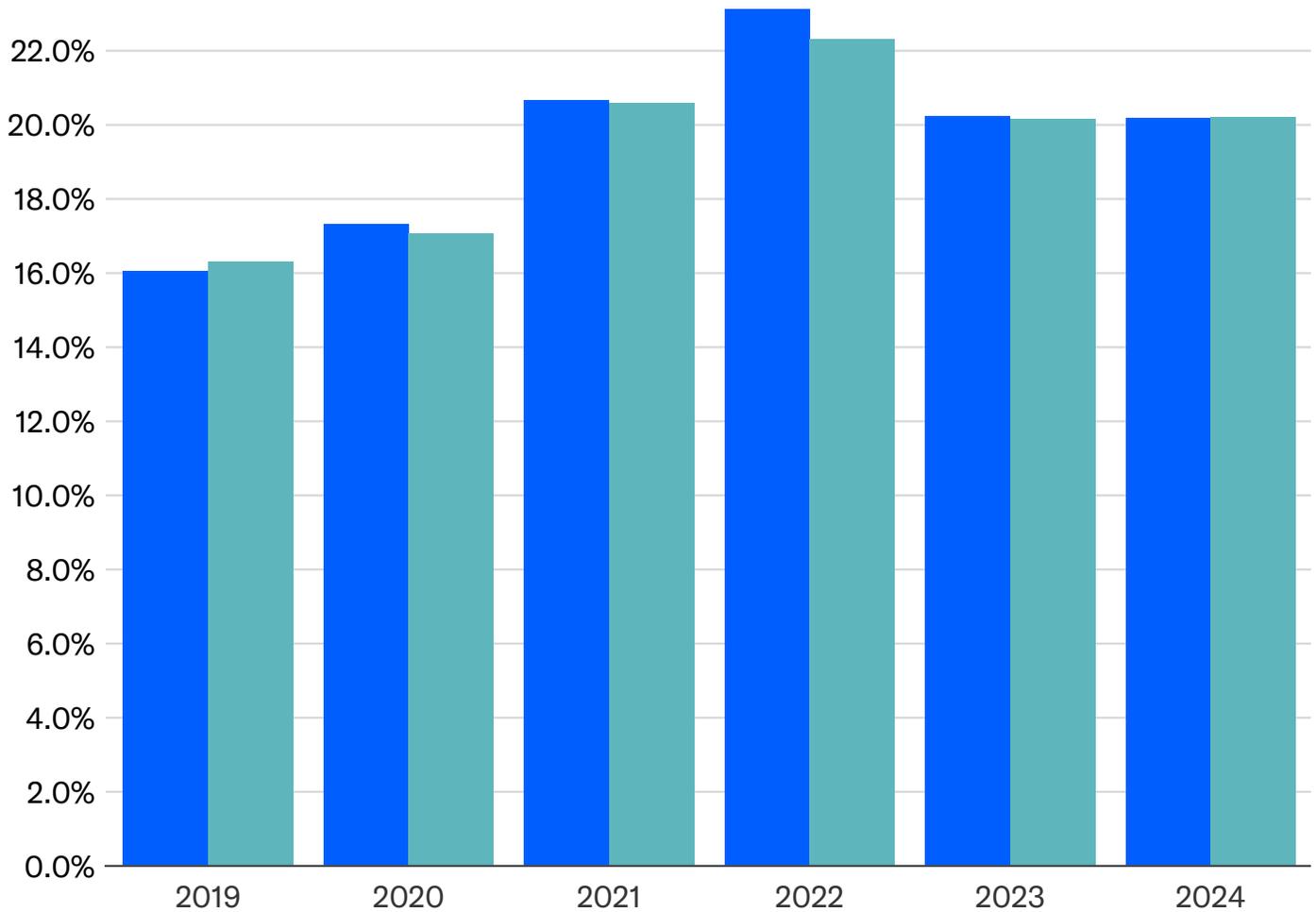
Enrollment is projected to remain flat over the near term



Source: Moody's Ratings, GEMS OPI, MT (combined enrollment data)

Exhibit 3  
**Financial Trends — Reserves are projected to remain stable over the near term**

■ Fund Balance as a % of Revenues ■ Cash Balance as a % of Revenues



Source: Moody's Ratings

**ESG considerations**

**Environmental**

Environmental considerations for the district reflect its exposure to physical climate risks, notably its high risk for wildfires and water stress by virtue of its location.

**Social**

Social considerations for the district reflect ongoing population growth over the past decade, including during the pandemic period, which has contributed to increased housing demand. This trend may result in future housing pressures should home prices continue to rise rapidly.

### Governance

The Governance consideration is a key credit driver including its prudent financial management with management closely monitoring and adjusting its budget as needed. The district also has a fund balance policy to maintain committed funds between 5% to 10% of expenditures.

Montana school districts have an Institutional Framework score <sup>1</sup> of A. The bulk of revenue is controlled by state funding formulas and while funding has generally increased, the state sometimes reduces funding or holds revenue flat. Districts can provide meaningful additional local revenue in the form of board-controlled and voter-approved local levies.

## Rating methodology and scorecard factors

The US K-12 Public School Districts Methodology includes a scorecard, a tool providing a composite score of a school district's credit profile based on the weighted factors we consider most important, universal and measurable, as well as possible notching factors dependent on individual credit strengths and weaknesses. Its purpose is not to determine the final rating, but rather to provide a standard platform from which to analyze and compare school district credits.

Exhibit 4

### Helena School District 1, MT

	Measure	Weight	Score
<b>Economy</b>			
Resident Income (MHI Adjusted for RPP / US MHI)	106.6%	10.0%	Aa
Full value per capita (full valuation of the tax base / population)	218,125	10.0%	Aaa
Enrollment trend (three-year CAGR in enrollment)	-1.2%	10.0%	A
<b>Financial performance</b>			
Available fund balance ratio (available fund balance / operating revenue)	20.2%	20.0%	Aa
Net cash ratio (net cash / operating revenue)	20.2%	10.0%	Aa
<b>Institutional framework</b>			
Institutional Framework	A	10.0%	A
<b>Leverage</b>			
Long-term liabilities ratio ((debt + ANPL + adjusted net OPEB) / operating revenue)	563.9%	20.0%	Ba
Fixed-costs ratio (adjusted fixed costs / operating revenue)	15.2%	10.0%	Aa
<b>Notching factors</b>			
<b>No notchings applied</b>			
Scorecard-Indicated Outcome			A1
<b>Assigned Rating</b>			
			<b>A1</b>

The complete list of outstanding ratings assigned to the Helena School District 1, MT is available on their [issuer page](#). Details on the current ESG scores assigned to the Helena School District 1, MT are available on their [ESGView page](#).

Sources: US Census Bureau, Helena School District 1, MT's financial statements and Moody's Ratings

## Appendix

Exhibit 5

### Key Indicators Glossary

	Definition	Typical Source*
<b>Economy</b>		
Resident income	Median Household Income (MHI), adjusted for Regional Price Parity (RPP), as a % of the US	MHI: American Community Survey (US Census Bureau) RPP: US Bureau of Economic Analysis
Full value (\$000)	Estimated market value of taxable property accessible to the district	State repositories, district's audited financial reports, offering documents or continuing disclosure
Population	Population of school district	American Community Survey (US Census Bureau)
Full value per capita	Full value / population of school district	
Enrollment	Student enrollment of school district	State data publications
Enrollment trend	3-year Compound Annual Growth Rate (CAGR) of Enrollment	State data publications; Moody's Ratings
<b>Financial performance</b>		
Operating revenue (\$000)	Total annual operating revenue in what we consider to be the district's operating funds	Audited financial statements
Available fund balance (\$000)	Committed, assigned and unassigned fund balances in what we consider to be the district's operating funds	Audited financial statements
Net cash (\$000)	Net cash (cash and liquid investments minus short-term debt) in what we consider to be the district's operating funds	Audited financial statements
Available fund balance ratio	Available fund balance / Operating Revenue	Audited financial statements
Net cash ratio	Net Cash / Operating Revenue	Audited financial statements
<b>Leverage</b>		
Debt (\$000)	District's direct gross debt outstanding	Audited financial statements; official statements
ANPL (\$000)	District's pension liabilities adjusted by Moody's to standardize the discount rate used to compute the present value of accrued benefits	Audited financial statements; Moody's Ratings
OPEB (\$000)	District's net other post-employment benefit (OPEB) liabilities adjusted by Moody's to standardize the discount rate used to compute the present value of accrued benefits	Audited financial statements; Moody's Ratings
Long-term liabilities ratio	Debt, ANPL and OPEB liabilities as % of operating revenue	Audited financial statements, official statements; Moody's Ratings
Implied debt service (\$000)	Annual cost to amortize district's long-term debt over 20 years with level payments	Audited financial statements; official statements; Moody's Ratings
Pension tread water (\$000)	Pension contribution necessary to prevent reported unfunded pension liabilities from growing, year over year, in nominal dollars, if all actuarial assumptions are met	Audited financial statements; Moody's Ratings
OPEB contributions (\$000s)	District's actual contribution in a given period, typically the fiscal year	Audited financial statements; official statements
Fixed-costs ratio	Implied debt service, pension tread water and OPEB contributions as % of operating revenue	Audited financial statements, official statements, pension system financial statements

\*Note: If typical data source is not available then alternative sources or proxy data may be considered. For more detailed definitions of the metrics listed above please refer to the [US K-12 Public School Districts Methodology](#).

Source: Moody's Ratings

## Endnotes

- The institutional framework score categorically assesses whether a district has the legal ability to raise the bulk of its operating revenue at the local level or if the state determines the bulk of its operating revenue. Beyond the local versus state categorization, the strength of the institutional framework score is a measure of the district's flexibility in raising additional locally determined operating revenue. See [US K-12 Public School Districts Methodology](#) for more details.

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REPORT NUMBER 1465326

CLIENT SERVICES

Americas	1-212-553-1653
Asia Pacific	852-3551-3077
Japan	81-3-5408-4100
EMEA	44-20-7772-5454

# MUNICIPAL BONDS

On or about Thursday, November 20, 2025 D.A. Davidson & Co. expects to offer:

## ELEMENTARY

### \$31,500,000\*

School District No. 1 (Helena)  
Lewis and Clark County, Montana

General Obligation School  
Building Bonds, Series 2025

Maturities\*: July 1, 2028-2046

Insurance: Build America Mutual Assurance Company

Ratings: S&P Insured: "AA"  
Moody's Underlying: "A1"

## HIGH SCHOOL

### \$130,000,000\*

High School District No. 1 (Helena)  
Lewis and Clark County, Montana

General Obligation School  
Building Bonds, Series 2025

Maturities\*: July 1, 2028-2056

Insurance: Build America Mutual Assurance Company

Ratings: S&P Insured: "AA"  
Moody's Underlying: "A1"

**NOT Bank Qualified · New Issue · Book-Entry Only**

**Tax-Exempt:** In the opinion of Dorsey & Whitney LLP, Bond Counsel, based on existing law and assuming the accuracy of certain representations and compliance with certain covenants, interest on the Bonds (i) is excludable from gross income for federal income tax purposes under Section 103 of the Internal Revenue Code of 1986, as amended (the "Code"), (ii) is not an item of tax preference for purposes of the federal alternative minimum tax imposed on noncorporate taxpayers by Section 55 of the Code, and (iii) is excludable from taxable income for Montana individual income tax purposes. Interest on the Bonds may, however, be taken into account in determining adjusted financial statement income for purposes of the federal alternative minimum tax imposed on applicable corporations (as defined in Section 59(k) of the Code), and is includable in income for purposes of the Montana corporate income tax and the Montana alternative corporate income tax. The Bonds are not "qualified tax-exempt obligations" within the meaning of Section 265(b)(3) of the Code.

**Security:** The Bonds are general obligations of the Districts payable from the proceeds of an ad valorem tax that each District will covenant to levy annually on all taxable property within the respective District, without limitation as to rate or amount.

**Elementary Purpose:** The proceeds of the Elementary District Bonds, together with other legally available funds, if any, will be used for the purpose of providing funds to (i) pay all or a portion of the costs designing, constructing,

furnishing, and equipping a new Kessler School building in replacement of the existing Kessler School building; related improvements and costs; and (ii) pay costs associated with the sale and issuance of the Elementary District Bonds.

**High School Purpose:** The proceeds of the High School District Bonds, together with other legally available funds, if any, will be used for the purpose of providing funds to (i) pay the costs of designing, constructing, furnishing, and equipping (a) a new Helena High School building in replacement of the existing Helena High School building, along with associated improvements; and (b) improvements to portions of the Capital High School building and campus; and related improvements and costs; and (ii) pay costs associated with the sale and issuance of the High School District Bonds.

**Redemption\*:** The Bonds maturing on or after July 1, 2036\* are subject to redemption at the option of the respective District on January 1, 2036\* and on any date thereafter at a price equal to the principal amount being redeemed plus interest accrued to the date of redemption, without premium.

**Maturities/Interest Rates\*:** The Elementary District Bonds will mature on July 1 of each year, with maturities in 2028 through 2046. The High School District Bonds will mature on July 1 of each year, with maturities in 2028 through 2056. Interest rates on the Bonds are expected to be established on or about Thursday, November 20, 2025\*.

\*Preliminary: subject to change.

**Please contact D.A. Davidson & Co. in advance for expected yield information.**

The Bonds are subject to availability and to the acceptance of an offer to purchase. This is neither an offer to sell nor a solicitation of an offer to buy any of these securities. The offering of these securities is made only by the Official Statement, copies of which are available from D.A. Davidson & Co.



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NEW ISSUE  
BOOK-ENTRY ONLY  
NOT BANK QUALIFIED

INSURANCE: Build America Mutual Assurance Company  
RATINGS: S&P Global Ratings: Insured "AA"  
Moody's Investors Service: Underlying: "A1"  
(See "BOND INSURANCE" and "RATINGS" herein.)

In the opinion of Dorsey & Whitney LLP, Bond Counsel, based on existing law and assuming the accuracy of certain representations and compliance with certain covenants, interest on the Bonds (i) is excludable from gross income for federal income tax purposes under Section 103 of the Internal Revenue Code of 1986, as amended (the "Code"), (ii) is not an item of tax preference for purposes of the federal alternative minimum tax imposed on noncorporate taxpayers by Section 55 of the Code, and (iii) is excludable from taxable income for Montana individual income tax purposes. Interest on the Bonds may, however, be taken into account in determining adjusted financial statement income for purposes of the federal alternative minimum tax imposed on applicable corporations (as defined in Section 59(k) of the Code), and is includable in the computation of income for purposes of the Montana corporate income tax and the Montana alternative corporate income tax. The Bonds are not "qualified tax-exempt obligations" within the meaning of Section 265(b)(3) of the Code. (See "BONDS NOT QUALIFIED TAX-EXEMPT OBLIGATIONS" and "TAX CONSIDERATIONS" herein.)

\$31,500,000\*  
School District No. 1 (Helena)  
Lewis and Clark County, Montana  
General Obligation School Building Bonds, Series 2025

\$130,000,000\*  
High School District No. 1 (Helena)  
Lewis and Clark County, Montana  
General Obligation School Building Bonds, Series 2025

ELEMENTARY DISTRICT BONDS DUE: July 1, as shown on the inside cover  
HIGH SCHOOL DISTRICT BONDS DUE: July 1, as shown on the inside cover DATED: Date of Delivery (expected to be December 18, 2025)  
School District No. 1 (Helena), Lewis and Clark County, Montana (the "Elementary District") and High School District No. 1 (Helena), Lewis and Clark County, Montana (the "High School District") (collectively, the "Districts") provide this Preliminary Official Statement in connection with the issuance by the Elementary District of the Elementary District's General Obligation School Building Bonds, Series 2025 (the "Elementary District Bonds") and by the High School District of the High School District's General Obligation School Building Bonds, Series 2025 (the "High School District Bonds") (collectively, the "Bonds"). The Bonds mature annually on July 1 in each of the years and amounts set forth on the inside cover hereof and will bear interest from their Date of Delivery to their respective maturities, or date of prior redemption, at the rates as shown on the inside cover herein.

The Bonds will be issued as fully registered bonds and will be registered in the name of Cede & Co., as registered owner and nominee for The Depository Trust Company ("DTC"), New York, New York. DTC will act as securities depository for the Bonds. Individual purchases and sales of the Bonds may be made in book-entry form only, in the principal amount of \$5,000 within a single maturity and in integral multiples thereof. Purchasers of the Bonds (the "Beneficial Owners") will not receive physical bond certificates. Interest on the Bonds will be payable semi-annually on each January 1 and July 1, commencing January 1, 2027. The Districts have appointed U.S. Bank Trust Company, National Association to serve as registrar and paying agent (the "Registrar") for the Bonds. The principal of and interest on the Bonds will be payable by the Registrar to DTC, which will in turn remit such principal and interest to DTC Participants for subsequent disbursement to the Beneficial Owners of the Bonds. (See "THE BONDS – Book-Entry Form" herein.)

The Bonds are general obligations of the Districts payable from the proceeds of an ad valorem tax that each District will covenant to levy annually on all taxable property within the respective District, without limitation as to rate or amount. The Bonds are being issued in accordance with the provisions of Title 20, Chapter 9, Montana Code Annotated.

The proceeds of the Elementary District Bonds, together with other legally available funds, if any, will be used for the purpose of providing funds to (i) pay all or a portion of the costs designing, constructing, furnishing, and equipping a new Kessler School building in replacement of the existing Kessler School building; related improvements and costs; and (ii) pay costs associated with the sale and issuance of the Elementary District Bonds. The Elementary District has determined to proceed with the issuance of the Elementary District Bonds in the principal amount of \$31,500,000\* as the first series of bonds, and expects to issue up to \$11,500,000\* in principal amount of the remaining Elementary District Bond Authorization (defined herein) in calendar year 2027 (the "Projected Elementary Bonds"). The proceeds of the High School District Bonds, together with other legally available funds, if any, will be used for the purpose of providing funds to (i) pay the costs of designing, constructing, furnishing, and equipping (a) a new Helena High School building in replacement of the existing Helena High School building, along with associated improvements; and (b) improvements to portions of the Capital High School building and campus; and related improvements and costs; and (ii) pay costs associated with the sale and issuance of the High School District Bonds. The High School District has determined to proceed with the issuance of the High School District Bonds in the principal amount of \$130,000,000\* as the first series of bonds, and expects to issue up to \$110,000,000\* in principal amount of the remaining High School District Bond Authorization (defined herein) in calendar years 2027 and 2028 (the "Projected High School Bonds"). (See "THE BONDS – Authorization," "– Security," and "– Purpose and Sources and Application of Funds" herein.)

The Elementary District Bonds maturing on or after July 1, 2036\* are subject to redemption at the option of the Elementary District on January 1, 2036\* and on any date thereafter at a price equal to the principal amount being redeemed plus interest accrued to the date of redemption, without premium. The High School District Bonds maturing on or after July 1, 2036\* are subject to redemption at the option of the High School District on January 1, 2036\* and on any date thereafter at a price equal to the principal amount being redeemed plus interest accrued to the date of redemption, without premium. Term Bonds, if any, will be subject to mandatory sinking fund redemption. (See "THE BONDS – Redemption" herein.)

The scheduled payment of principal of and interest on the Bonds when due will be guaranteed under a municipal bond insurance policy to be issued concurrently with the delivery of the Bonds by **BUILD AMERICA MUTUAL ASSURANCE COMPANY.**



The Bonds are offered when, as and if issued by the Districts, subject to prior sale, to withdrawal or modification of the offer without notice, and to the opinions as to validity and tax exemption of the interest on the Bonds by Dorsey & Whitney LLP, Missoula, Montana and Minneapolis, Minnesota, Bond Counsel. It is expected that the Bonds in definitive form will be available for book-entry delivery through the facilities of DTC on or about December 18, 2025 (the "Date of Delivery" or "Closing").

This cover page contains certain information for quick reference only. It is not a summary of this issue. Investors must read the entire official statement to obtain information essential to making an informed investment decision.

\* Preliminary; subject to change.

This Preliminary Official Statement and the information contained herein are subject to completion or amendment without notice. The securities may not be sold nor may offers to buy be accepted prior to the time the Official Statement is delivered in final form. Under no circumstances shall this Preliminary Official Statement constitute an offer to sell or the solicitation of an offer to buy nor shall there be any sale of the securities in any jurisdiction in which such offer, solicitation or sale would be unlawful prior to registration or qualification under the securities laws of such jurisdiction.



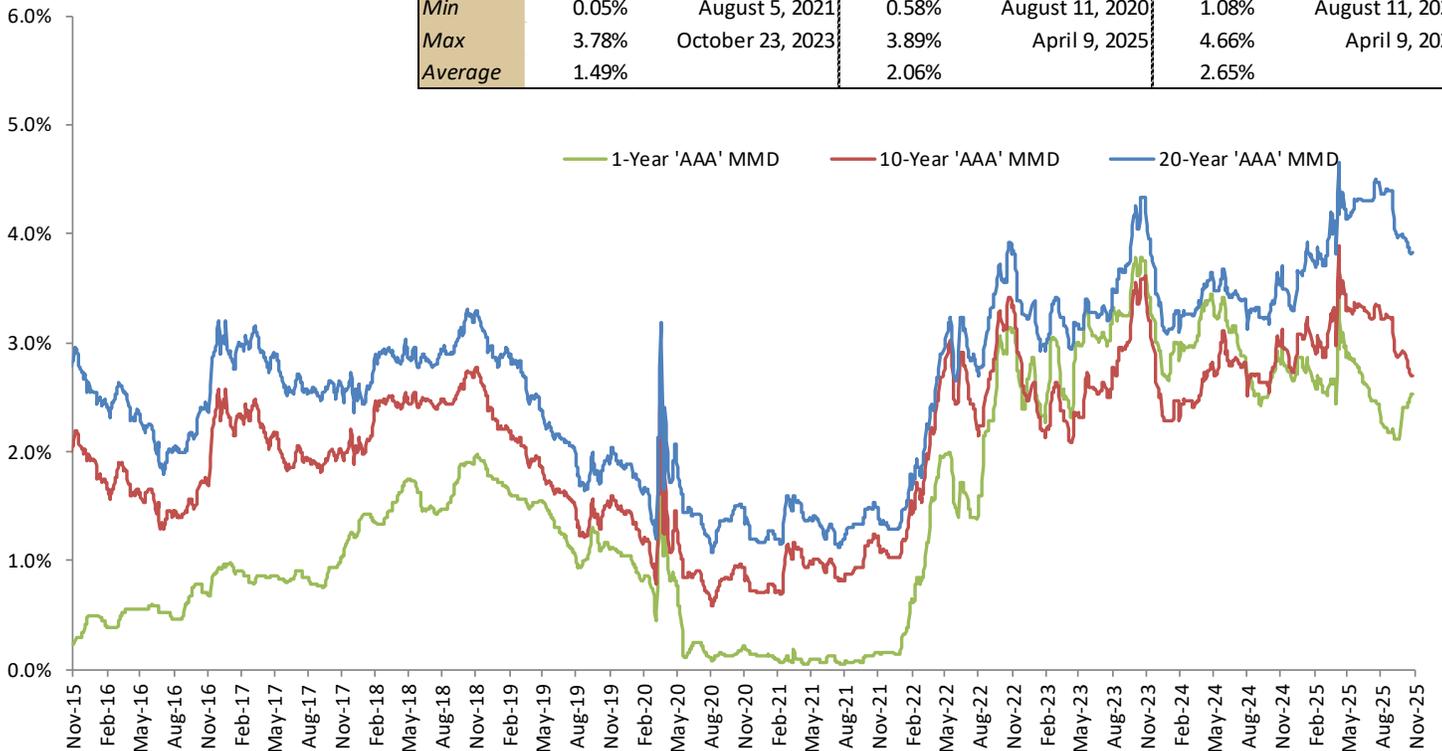
# MUNICIPAL BOND MARKET UPDATE

November 3, 2025

## “AAA” MUNICIPAL MARKET DATA INDEX (MMD)

1-YEAR, 10-YEAR & 20-YEAR MATURITIES: 11/03/2015 - 11/03/2025

	1-Year 'AAA' MMD		10-Year 'AAA' MMD		20-Year 'AAA' MMD	
<i>Latest</i>	2.56%	November 3, 2025	2.73%	November 3, 2025	3.86%	November 3, 2025
<i>Min</i>	0.05%	August 5, 2021	0.58%	August 11, 2020	1.08%	August 11, 2020
<i>Max</i>	3.78%	October 23, 2023	3.89%	April 9, 2025	4.66%	April 9, 2025
<i>Average</i>	1.49%		2.06%		2.65%	



**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.D.2.a.-d.**

- Call To Order/Pledge of Allegiance
- Review of Agenda
- Recognitions
- Superintendent's Report
- General Public Comment
- Consent Action Items
- Items For Action
- Item For Information
- Items For Information-Facilities Bond Projects Updates
- Reports
- Upcoming Meetings
- Board/Superintendent Comments
- Adjournment

**Item Title:       Item For Information- Facilities Bond Projects Updates**  
2. Helena High Campus Update  
    a. Helena High School  
    b. Project For Alternative Learning (PAL)  
    c. District Kitchen  
    d. Competition Stadium

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.D.3.**

- Call To Order/Pledge of Allegiance
- Review of Agenda
- Recognitions
- Superintendent's Report
- General Public Comment
- Consent Action Items
- Items For Action
- Item For Information
- Items For Information-Facilities Bond Projects Updates
- Reports
- Upcoming Meetings
- Board/Superintendent Comments
- Adjournment

**Item Title:**      **Item For Information- Facilities Bond Projects Updates**  
3. Capital High School Architect Selection and Planning Update

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.D.4.**

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:**      **Item For Information- Facilities Bond Projects Updates**  
4. Kessler Elementary School-Architect RFQ Timeline

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.D.5.a.-.c.**

- Call To Order/Pledge of Allegiance
- Review of Agenda
- Recognitions
- Superintendent's Report
- General Public Comment
- Consent Action Items
- Items For Action
- Item For Information
- Items For Information-Facilities Bond Projects Updates
- Reports
- Upcoming Meetings
- Board/Superintendent Comments
- Adjournment

**Item Title:**      **Item For Information- Facilities Bond Projects Updates**  
5.GCCM RFQ/RFP Timeline  
a. Helena High School  
b. Capital High School  
c. Kessler Elementary School

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Meeting Date:** 11/11/2025

**Item VI.E.1. - 10.**

- Call To Order/Pledge of Allegiance
- Review of Agenda
- Recognitions
- Superintendent's Report
- General Public Comment
- Consent Action Items
- Items For Action
- Item For Information
- Items For Information-Facilities Bond Projects Updates
- Reports
- Upcoming Meetings
- Board/Superintendent Comments
- Adjournment

**Item Title:**

**Reports**

1. Student Representatives Report
2. Helena Education Association Report
3. Facilities & Technology Committee Report
4. Budget & Finance Committee Report
5. Teaching & Learning Committee Report
6. Policy Committee Report
7. Health Benefits Committee Report
8. Wellness Committee Report
9. Montana School Boards Association Report
10. Parent Council Visit Report

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item VII.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:      Upcoming Meetings**

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item VIII.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:        Board/Superintendent Comments**

**HELENA SCHOOL DISTRICT  
Board of Trustees Meeting**

**Item IX.**

**Meeting Date:** 11/11/2025

Call To Order/Pledge of Allegiance

Review of Agenda

Recognitions

Superintendent's Report

General Public Comment

Consent Action Items

Items For Action

Item For Information

Items For Information-Facilities Bond Projects Updates

Reports

Upcoming Meetings

Board/Superintendent Comments

Adjournment

**Item Title:      Adjournment**