



Board of Trustees Work Session

**Bryant Elementary
School Library
1520 Livingston Ave, Helena,
MT 59601
July 15, 2026 – 9:00 a.m.**

AGENDA

I. CALL TO ORDER/PLEDGE OF ALLEGIANCE/INTRODUCTIONS

II. REVIEW OF AGENDA

III. 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.*

IV. NEW BUSINESS

A. CONSENT ACTION ITEMS

1. Resolution to Dispose of Personal Property - CHS Equipment Surplus Items
 2. 2026 MTSBA Annual Meeting Electronic Ballot Action Items
 3. Personnel Actions
 4. Approval of FY 2026-27 Out-Of-District Attendance Agreements (Non-Resident Students Attending HPS)
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5. Acknowledge FY 2026-27 Out-Of-District Attendance Agreements (Helena Resident Students Attending Other School Districts)
6. Warrants
7. 5.26.26 Board of Trustees Work Session Part 1 Minutes
8. 5.26.26 Board of Trustees Work Session Part 2 Minutes
9. 6.2.26 Board of Trustees Special Board Meeting Minutes

B. ITEMS FOR ACTION

1. Approval of the Health Benefits Committee's Recommendation for the Plan Year 2026 – 2027 Premium Rates
2. Approval of the Transition to an Administrative Step Salary Matrix
3. Approval and Ratification of the HPS-International Brotherhood of Electrical Workers (IBEW) Local 233 Collective Bargaining Agreement for 2026-2028
4. Character Strong Curriculum Approval
5. Approval of Mount Ascension Elementary and Middle School Removal from Charter Status

C. ITEMS FOR INFORMATION

1. Mentorship Update
2. CAMPS School Funding Proposal
3. Board Advocacy
4. Board Training with Legal Counsel

Recess for Lunch

5. Educational Data and Curricular Training
6. Performance Indicators and Data Dashboard Implementation
7. Trustee Engagement and Operations
8. Wrap Up and Next Steps

V. BOARD/SUPERINTENDENT COMMENTS

VI. ADJOURNMENT

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item I.

X

Call To Order/Pledge of Allegiance/Introductions

Review of Agenda

General Public Comment

Consent Action Items

Items for Action

Items for Information

Board/Superintendent Comments

Adjournment

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

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Item II.

Meeting Date: 7/15/2026

☐ Call To Order/Pledge of Allegiance/Introductions

☒ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☐ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: **Review of Agenda**

**HELENA SCHOOL DISTRICT
Board of Trustees Meeting**

Meeting Date: 7/15/2026

Item III.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☒ General Public Comment

☐ Consent Action Items

☐ Items for Action

☐ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: General Public Comment

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.A.1. - A.9.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☒ Consent Action Items

☐ Items for Action

☐ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

- Item Title: Consent Action Items
- 1. Resolution to Dispose of Personal Property - CHS Equipment Surplus Items
 - 2. 2026 MTSBA Annual Meeting Electronic Ballot Action Items
 - 3. Personnel Actions
 - 4. Approval of FY 2026-27 Out-Of-District Attendance Agreements (Non-Resident Students Attending HPS)
 - 5. Acknowledge FY 2026-27 Out-Of-District Attendance Agreements (Helena Resident Students Attending Other School Districts)
 - 6. Warrants
 - 7. 5.26.26 Board of Trustees Work Session Part 1 Minutes
 - 8. 5.26.26 Board of Trustees Work Session Part 2 Minutes
 - 9. 6.2.26 Board of Trustees Special Board Meeting Minutes

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

HELENA SCHOOL DISTRICT NO., LEWIS AND CLARK COUNTY
RESOLUTION TO DISPOSE OF PERSONAL PROPERTY

WHEREAS, the trustees of any district have the power and the responsibility to hold in trust all real and personal property of the District for the benefit of the schools and children of the district, and;

WHEREAS, the trustees of any district have the authority to determine that certain personal property of the District is or is about to become abandoned, obsolete, undesirable, or unsuitable for the school purposes of the district pursuant to Mont. Code Ann. § 20-6-604, and;

WHEREAS, the District owns items of personal property consisting of Outdated CTE instructional materials (see attached list); and

WHEREAS, the Board of Trustees of Helena School District No. 1 desires to sell or dispose of such Instructional materials because they are abandoned, obsolete, undesirable or unsuitable for school purposes;

THEREFORE, BE IT RESOLVED, that the Board of Trustees of Helena School District No. 1, Lewis and Clark County, Montana, shall dispose of the CTE Instructional Materials (see attached list) by donation or dispose of in trash. The items may be viewed at the shop behind Capital High School, room T3, located at 100 Valley Drive between the hours of 2 and 5 PM on August 5th and 6th, 2026. Please call Cal Boyle, Principal, for more information.

This Resolution shall not become effective for 14 days. Upon expiration of the 14-day period, the Superintendent of the District shall effectuate the disposal of the above-described property.

Adopted this ____ day of _____ 2026.

By: _____

Chairperson, Board of Trustees

ATTEST:

By: _____

Samantha Holman, District Clerk

Helena School District No. 1

	Year (optional)	Make	Model/ Number	Quantity	Short Description
CARPENTRYSHOP					
		Powermatic	97661745		5 hp 3 phase Table saw W/ rolling stand works
		jet	JSG-6DC		Belt / disc combo sander/ needs switch
		powermatic	1792800		18" powermatic drill press / non working
		Dewalt	DW708/260867		sliding compound mitre saw/ parts
		Dewalt	DW708/21566		sliding compound miter saw/ not working
		Dewalt	DW708/87993		sliding compound miter saw/ motor noise
		Dewalt	Dw705		compound miter saw/ works
		Dewalt	dw718		sliding compound miter saw/ motor noise
		Delta	sa180		belt sander/ works
		Bostitch	cap 1560		Air compressor / non running
		Jet	afs1000		air filtration
		rebel	Unknown		aluminum bench top router table /no router
WELDING SHOP					
		square d	200819		power wire wheel
		millers	LE332588		110 SHORTCIRCUITWELDER
		millers	LE3325133		110 SHORTCIRCUITWELDER
		millers	MC070778N		110 SHORTCIRCUITWELDER

Please submit your District's 2026 MTSBA Annual Meeting electronic ballot by clicking on the link provided in the message below. Thank you.

2026 Ballot

Montana School Boards Association

To: MTSBA Member District Board Chairs
From: Lance Melton, Executive Director
Date: June 17, 2026
Re: 2026 MTSBA Membership Electronic Vote

Thank you for your continued membership and engagement in the Montana School Boards Association (MTSBA). Your participation and leadership are essential to advancing MTSBA's core purpose of developing the full potential of each child through school board leadership and mission of supporting Montana's public schools and the locally elected trustees who govern them. We sincerely appreciate your commitment to the Association and to public education across our state.

Please submit your District's **2026 MTSBA Annual Meeting Electronic Ballot** by clicking on the voting link provided below and following the instructions outlined in this communication.

Annual Meeting and Electronic Voting Process

The MTSBA Annual Meeting was held on June 10, 2026, at MTSBA Headquarters in Helena. The purpose of the meeting was to provide members with an opportunity to review and discuss the items presented in the **2026 Annual Meeting Booklet**. No formal action was taken during the meeting.

Pursuant to the MTSBA Bylaws, Association business may be conducted between membership meetings through an electronic ballot process authorized by the Board of Directors. Relevant bylaw provisions include:

Article III, Section 7 – Voting Between Meetings of Members, which authorizes voting by ballot distributed by the Executive Director; and

Article XII – Conducting Business Through Electronic Means, which authorizes the Association to conduct business through electronic methods, including electronic ballots and elections.

Items Requiring Membership Action

The following matters have been advanced by the MTSBA Board of Directors and are presented to the membership for consideration. Detailed information regarding each

item can be found in the **2026 Annual Meeting Booklet** at the page numbers indicated below:

- **Confirmation of MTSBA Principles & Guidelines** (beginning on page 7)
- **Confirmation of the Foundational Elements of MTSBA's DNA** (beginning on page 13)
- **FY28 Dues Revenue Estimate** (beginning on page 37)
Please note: Members are not voting on their district's FY28 dues assessment. Rather, members are voting on the FY28 Dues Revenue Estimate calculated pursuant to the MTSBA Bylaws.
- **Proposed MTSBA Bylaw Amendments** (beginning on page 40)
- **MTSBA Gap Analysis Resolution for the 2027 Interim and 2027 Legislative Session** (beginning on page 59)
- **Election of MTSBA Representative to the Montana High School Association (MHS) Board of Directors**, both jointly nominated by the MTSBA Board of Directors. NOTE: Your District will be voting for one (1) nominee (beginning on page 67):
 - Iris KillEagle, Dodson Public Schools Trustee
 - Tom Billteen, Butte Public Schools Trustee
- **Election of MTSBA President-Elect** (page 69)
Nominee:
 - Jennifer Hoffman, Billings Public Schools Trustee
- **Election of MTSBA Vice President** (page 69)
Nominee:
 - Stephanie Esch, Stevensville Public Schools Trustee and MTSBA Region 6 Director

Attached Documents

The following documents are attached for your review:

1. **2026 Annual Meeting Booklet** – provides background information and explanations regarding each item on the ballot.
2. **Electronic Ballot PDF** – a printable copy of the ballot for review and discussion prior to submission of your District's official vote.

Electronic Voting Link

Please use the following link to submit your District's official ballot:

https://www.surveymonkey.com/r/2026_MTSBA_Membership_Electronic_Vote

Instructions for Submitting Your District's Vote

Step 1 – Board Review and Action

Your Board of Trustees should place these matters on its July or August meeting agenda, discuss the issues presented, and take official action on each item.

Step 2 – Complete the Electronic Ballot

Following Board action, the Board Chair or District Clerk (acting on behalf of the Board Chair) should complete the electronic ballot by providing:

- The **name of your school district** (please do not use the district number);
- The **name of the individual submitting the ballot** on behalf of the district;
- The district's vote on each ballot item as directed by the Board;
- The **Board Chair's name**, which will serve as the Board Chair's electronic signature; and
- Submission of the completed ballot.

Step 3 – Submit by the Deadline

All electronic ballots must be submitted no later than:

5:00 p.m. (Mountain Time) on Friday, July 31, 2026

The electronic voting portal will close at that time.

Reporting of Results

MTSBA staff will tabulate all ballots received and will report the results to the membership through Connect2MTSBA following certification of the vote.

Thank you again for your membership, leadership, and participation in the Montana School Boards Association. We appreciate your time and thoughtful consideration of these important Association matters.

Debra Silk
Assoc Exec Dir & General Counsel
Montana School Boards Association

PERSONNEL ACTIONS

June 10, 2026 – July 15, 2026

CERTIFIED PERSONNEL

Appointments

<u>Location/Assignment</u>	<u>Name</u>	<u>Offered Salary</u>	<u>Accepted Salary</u>	<u>Start Date</u>
HHS/School Counselor	Birmingham, Cristin	\$53,043.75/year	\$53,043.75/year	08/24/2026
CRA/English	Brown, Katherine	\$54,152.21/year	\$54,152.21/year	08/24/2026
CRA/English	Clifford, Margaret	\$53,401.32/year	\$53,401.32/year	08/24/2026
Jim Darcy-Rossiter/School Nurse	Cox, Christine	\$62,752.94/year	\$62,752.94/year	08/24/2026
Broadwater/Kindergarten	Edwards, Theresa	\$62,752.94/year	\$62,752.94/year	08/24/2026
Smith/Kindergarten	Gaydos, Jasmine	\$52,275.00/year	\$52,275.00/year	08/24/2026
HHS/School Counselor	Howard-Murphy, Linden	\$60,110.89/year	\$60,110.89/year	08/24/2026
Lincoln/Dir. of Spec. Ed/Student Health Svcs.	Jarvis, Jenny	\$122,035.99/year	\$122,035.99/year	07/30/2026
Four Georgians/Grade 4	Lindstrom, Carly	\$52,275.00/year	\$52,275.00/year	08/24/2026
HHS/Spanish	Montoya, Iliana	\$53,776.76/year	\$53,776.76/year	08/24/2026
Broadwater/Title I Instructional Coach	Otteson, Laura	\$62,752.94/year	\$62,752.94/year	08/24/2026
Four Georgians/Elementary Principal	Rutter, Brittany	\$111,689.46/year	\$111,689.46/year	07/01/2026
Central/Special Education	Szczepaniak, Emily	\$54,152.21/year	\$54,152.21/year	08/24/2026

Terminations/Retirements

<u>Location/Assignment</u>	<u>Name</u>	<u>Reason</u>	<u>Effective</u>
Smith/Kindergarten	Hasselbach, Amy	Resignation	06/24/2026
Bryant/Special Education-Resource	Schimmoeller, Hannah	Resignation	06/25/2026
Four Georgians/Elementary Principal	Shinkle, Carrie	Resignation	06/30/2026

Leaves

<u>Location/Assignment</u>	<u>Name</u>	<u>Term</u>	<u>Type of Leave</u>
CHS/History	Mazurek-Pierce, Chelsea	2026-2027 SY	LOAWOP

CLASSIFIED PERSONNEL

Appointments

<u>Location/Assignment</u>	<u>Name</u>	<u>Offered Salary</u>	<u>Accepted Salary</u>	<u>Start Date</u>
Facilities/Centralized Maintenance	Boyd, Derek	\$19.57/hr.	\$19.57/hr.	06/16/2026
SSC/Level II Para Educator	Gustafson, Elspeth	\$20.33/hr.	\$20.33/hr.	08/24/2026
Jim Darcy/Para Educator	Helmick, Nancy	\$18.98/hr.	\$18.98/hr.	08/24/2026
Jim Darcy/Para Educator	Huckins, Kami	\$16.75/hr.	\$16.75/hr.	08/24/2026
HHS/Evening Custodian	Kirk, Richard	\$17.90/hr.	\$17.90/hr.	06/18/2026
Lincoln/Data Analyst & State Reporting	McTaggart, Shane	\$54,662.40/year	\$54,662.40/year	06/16/2026
Facilities/Centralized Maintenance Lead	Pilon, James	\$24.06/hr.	\$24.06/hr.	06/16/2026

Terminations/Retirements

<u>Location/Assignment</u>	<u>Name</u>	<u>Reason</u>	<u>Effective</u>
Central/Para Educator	Cole, Amy	Resignation	06/09/2026
Kessler/Para Educator	Gaydos, Jasmine	Resignation	07/06/2026
Lincoln/Payroll Coordinator	Ford, Angela	Resignation	07/31/2026
Bryant/Para Educator	Holm, Theresa	Resignation	06/09/2026
Four Georgians/Para Educator	Lindstrom, Carly	Resignation	06/16/2026
Transportation/Routing Safety Spec.	Stinson, Christine	Resignation	07/31/2026

Leaves

<u>Location/Assignment</u>	<u>Name</u>	<u>Term</u>	<u>Type of Leave</u>
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Running Total of FY 2026-27 Out-of-District Attendance Agreements
(Out-of-District Students Attending Helena School District)

Grade	Residence																												Total
	East Helena	Helena	Clancy	Montana City	Jefferson City	Bevin	Wolf Creek	Boulder	Elliston	Tinny	Wolf Point	Dillon	Billings	Chester-Opjohn-Ingardness	Missoula	Great Falls	Butte	Townsend	Superior	Winston	Ronan	Whitehall	Canyon Creek	Glendive	Lame Deer	Stevensville	Belgrade	Choteau	
Ksprouts	1	1							1																				3
K	4	1																											5
1	1																												1
2																													0
3										1																			1
4																													0
5	3	1																											4
6	2																												2
7	1																												1
8																													0
9	2				32																								34
10	6				19																								25
11	3				22																								25
12	3				20																								23
	26	0	3	0	93	0	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	124

Last Updated: 7/10/2026 11:31

FY 2026-27 Out-of-District Attendance Agreements
(Out-of-District Students Attending Helena School District)

July 15, 2026

Discretionary Attendance Approvals:

Unique ID	Grade	District of Residence	Address	School of Attendance
12027001	5	Clancy Elementary School District	Townsend, MT 59644	Central
12027002	K	East Helena K-12	Clancy, MT 59634	Jim Darcy
12027003	6	East Helena K-12	Clancy, MT 59634	CRA
12027004	K	East Helena K-12	Montana City, MT 59634	Charter Montessori
12027005	PK	East Helena K-12	Helena, MT 59601	Smith
12027006	K	Clancy Elementary School District	Clancy, MT 59634	Smith
12027007	5	East Helena K-12	Clancy, MT 59634	Smith
12027008	PK	Clancy Elementary School District	Clancy, MT 59634	Warren
12027009	K	East Helena K-12	Clancy, MT 59634	Smith
12027010	K	East Helena K-12	Clancy, MT 59634	Smith
12027011	1	East Helena K-12	Clancy, MT 59634	Warren
12027012	3	Trinity School District	Clancy, MT 59634	Rossiter
12027013	PK	Trinity School District	Clancy, MT 59634	Rossiter
12027014	6	East Helena K-12	Clancy, MT 59634	HMS
12027015	5	East Helena K-12	Clancy, MT 59634	Smith
12027016	5	East Helena K-12	East Helena, MT 59635	Smith
12027017	7	East Helena K-12	Helena, MT 59602	Explore School
12027018	11	Jefferson High School District	East Helena, MT 59635	HHS
12027019	10	East Helena K-12	Helena, MT 59601	HHS
12027020	12	Jefferson High School District	Clancy, MT 59634-8528	HHS
12027021	10	Jefferson High School District	Clancy, MT 59634-9222	HHS
12027022	9	Jefferson High School District	Clancy, MT 59634	CHS
12027023	11	Jefferson High School District	Clancy, MT 59634-9217	HHS
12027024	9	Jefferson High School District	Clancy, MT 59634	HHS
12027025	9	Jefferson High School District	Basin, MT 59631	HHS
12027026	9	Jefferson High School District	Clancy, MT 59634	CHS
12027027	9	Jefferson High School District	Clancy, MT 59634	HHS
12027028	11	Jefferson High School District	Clancy, MT 59634	HHS
12027029	12	East Helena K-12	East Helena, MT 59635	CHS
12027030	11	Jefferson High School District	Montana City, MT 59634-9734	HHS
12027031	10	Jefferson High School District	Clancy, MT 59634-9216	HHS
12027032	9	Jefferson High School District	Clancy, MT 59634	HHS
12027033	11	East Helena K-12	Helena, MT 59601	HHS
12027034	11	Jefferson High School District	Clancy, MT 59634	HHS
12027035	9	Jefferson High School District	Clancy, MT 59634	HHS
12027036	11	Jefferson High School District	Clancy, MT 59634	HHS
12027037	9	Jefferson High School District	Clancy, MT 59634	HHS
12027038	12	Jefferson High School District	Clancy, MT 59634	HHS
12027039	9	Jefferson High School District	Montana City, MT 59634	HHS
12027040	12	Jefferson High School District	Montana City, MT 59634-9255	HHS
12027041	10	East Helena K-12	East Helena, MT 59635	CHS
12027042	11	Jefferson High School District	Clancy, MT 59634	HHS
12027043	10	East Helena K-12	East Helena, MT 59635-3434	HHS
12027044	10	Jefferson High School District	Clancy, MT 59634-9778	HHS
12027045	11	East Helena K-12	East Helena, MT 59635	HHS
12027046	10	Jefferson High School District	Clancy, MT 59634-9667	HHS

July 15, 2026

Discretionary Attendance Approvals:

Unique ID	Grade	District of Residence	Address	School of Attendance
12027047	12	Jefferson High School District	Clancy, MT 59634	HHS
12027048	9	Jefferson High School District	Clancy, MT 59634	HHS
12027049	9	Jefferson High School District	Clancy, MT 59634	HHS
12027050	9	Jefferson High School District	Clancy, MT 59634	HHS
12027051	10	Jefferson High School District	Clancy, MT 59634	HHS
12027052	12	Jefferson High School District	Clancy, MT 59634	HHS
12027053	9	Jefferson High School District	Clancy, MT 59634	HHS
12027054	10	East Helena K-12	Helena, MT 59601-6468	HHS
12027055	11	Jefferson High School District	Clancy, MT 59634	HHS
12027056	12	Jefferson High School District	Clancy, MT 59634-9823	HHS
12027057	10	Jefferson High School District	Clancy, MT 59634-9646	HHS
12027058	9	Jefferson High School District	Clancy, MT 59634	HHS
12027059	10	East Helena K-12	East Helena, MT 59635-1851	HHS
12027060	9	Jefferson High School District	Clancy, MT 59634	HHS
12027061	12	Jefferson High School District	Clancy, MT 59634-9785	HHS
12027062	10	Jefferson High School District	Clancy, MT 59634-9812	HHS
12027063	10	Jefferson High School District	Clancy, MT 59634-9724	HHS
12027064	12	Jefferson High School District	Clancy, MT 59634-9724	HHS
12027065	10	Jefferson High School District	Clancy, MT 59634-8535	HHS
12027066	9	Jefferson High School District	Clancy, MT 59634	HHS
12027067	10	Jefferson High School District	Clancy, MT 59634-9796	HHS
12027068	12	Jefferson High School District	Clancy, MT 59634	HHS
12027069	11	Jefferson High School District	Clancy, MT 59634	HHS
12027070	9	East Helena K-12	Helena, MT 59601	HHS
12027071	10	Jefferson High School District	Clancy, MT 59634-9824	HHS
12027072	11	Jefferson High School District	Clancy, MT 59634-9824	HHS
12027073	12	Jefferson High School District	Clancy, MT 59634-9553	HHS
12027074	11	Jefferson High School District	Clancy, MT 59634	HHS
12027075	12	Jefferson High School District	Clancy, MT 59634	HHS
12027076	9	Jefferson High School District	Clancy, MT 59634	HHS
12027077	11	Jefferson High School District	Montana City, MT 59634	HHS
12027078	9	Jefferson High School District	Montana City, MT 59634	HHS
12027079	9	Jefferson High School District	Clancy, MT 59634	HHS
12027080	9	Jefferson High School District	Clancy, MT 59634	HHS
12027081	12	Jefferson High School District	Montana City, MT 59634	HHS
12027082	12	Jefferson High School District	Clancy, MT 59634	HHS
12027083	10	Jefferson High School District	Clancy, MT 59634-8543	HHS
12027084	11	Jefferson High School District	Clancy, MT 59634	HHS
12027085	10	East Helena K-12	East Helena, MT 59635-8513	HHS
12027086	11	East Helena K-12	Helena, MT 59601	HHS
12027087	10	Jefferson High School District	Clancy, MT 59634-9612	HHS
12027088	10	Jefferson High School District	Clancy, MT 59634	HHS
12027089	9	Jefferson High School District	Clancy, MT 59634	HHS
12027090	11	Jefferson High School District	Montana City, MT 59634	HHS
12027091	11	Jefferson High School District	Clancy, MT 59634	HHS
12027092	9	Jefferson High School District	Clancy, MT 59634	HHS
12027093	10	Jefferson High School District	Clancy, MT 59634-9640	HHS
12027094	9	Jefferson High School District	Clancy, MT 59634	HHS
12027095	9	Jefferson High School District	Jefferson City, Mt 59638	HHS
12027096	9	Jefferson High School District	Clancy, MT 59634	HHS
12027097	9	Jefferson High School District	Clancy, MT 59634	HHS

July 15, 2026

Discretionary Attendance Approvals:

Unique ID	Grade	District of Residence	Address	School of Attendance
12027098	11	Jefferson High School District	Clancy, MT 59634	HHS
12027099	9	Jefferson High School District	Clancy, MT 59634	HHS
12027100	9	Jefferson High School District	Clancy, MT 59634	HHS
12027101	11	Jefferson High School District	Clancy, MT 59634	HHS
12027102	11	Jefferson High School District	Clancy, MT 59634-9523	HHS
12027103	10	Jefferson High School District	Clancy, MT 59634-8528	HHS
12027104	12	Jefferson High School District	Clancy, MT 59634-9626	HHS
12027105	9	Jefferson High School District	Clancy, MT 59634	HHS
12027106	12	East Helena K-12	Helena, MT 59602	HHS
12027107	9	Jefferson High School District	Clancy, MT 59634	HHS
12027108	10	Jefferson High School District	Clancy, MT 59634-9225	HHS
12027109	10	Jefferson High School District	Clancy, MT 59634	CHS
12027110	10	Jefferson High School District	Clancy, MT 59634-9806	HHS
12027111	12	Jefferson High School District	Clancy, MT 59634-9806	HHS
12027112	11	Jefferson High School District	Montana City, MT 59634	HHS
12027113	12	Jefferson High School District	Clancy, MT 59634-9673	HHS
12027114	9	Jefferson High School District	East Helena, MT 59635	HHS
12027115	11	Jefferson High School District	Clancy, MT 59634	HHS
12027116	11	Jefferson High School District	Clancy, MT 59634	HHS
12027117	11	Jefferson High School District	Clancy, MT 59634	HHS
12027118	12	East Helena K-12	Helena, MT 59601-6532	HHS
12027119	12	Jefferson High School District	Clancy, MT 59634-9698	HHS
12027120	12	Jefferson High School District	Clancy, MT 59634-9784	HHS
12027121	9	Jefferson High School District	Clancy, MT 59634	HHS
12027122	12	Jefferson High School District	Clancy, MT 59634-9784	HHS
12027123	9	East Helena K-12	Helena, MT 59601	HHS
12027124	12	Jefferson High School District	Clancy, MT 59634-9634	HHS

Running Total of Acknowledged 2026-27 Out-of-District Attendance Agreements
(Helena Resident Students Attending Other School Districts)

Grade	District of Attendance															Total
	East Helena K-12	Montana City Elementary	Clancy Elementary	Jefferson High School	Townsend K-12	Cascade High School	Trinity Elementary	Huntley Project K-12	Fairfield High School	Augusta High School	Anaconda High School	Great Falls Elementary	Augusta School District	Three Forks Public Schools	Missoula County Public Schools	
Pre-K	5	5	3													13
K	5	13														18
1	8	17														25
2	8	8														16
3	5	9														14
4	10	4														14
5	11	10														21
6	9	5														14
7	10	4														14
8	10	16														26
9	6					1										7
10	23					2										25
11	11		2													13
12	22		1		2			1	1				1			28
	143	91	3	3	0	5	0	0	1	1	0	0	0	0	0	248

Last Updated: 7/10/2026 11:31

FY 2026-27 Out-of-District Attendance Agreements
(Helena Resident Students Attending Other School Districts)

July 15, 2026

Discretionary Attendance Acknowledgements:

Unique ID	Grade	Address	District of Attendance
22027001	PK	Helena, MT 59602	Clancy Elementary School
22027002	PK	Helena, MT 59601	Clancy Elementary School
22027003	PK	Helena, MT 59601	Clancy Elementary School
22027004	12	Wolf Creek, MT 59648	Cascade Public Schools
22027005	9	Wolf Creek, MT 59648	Cascade Public Schools
22027006	10	Wolf Creek, MT 59648	Cascade Public Schools
22027007	10	Cascade, MT 59421	Cascade Public Schools
22027008	12	Cascade, MT 59421	Cascade Public Schools
22027009	12	Wolf Creek, MT 59648	Augusta School District
22027010	12	Wolf Creek, MT 59648	Fairfield Public Schools
22027011	12	Helena, MT 59602	Jefferson High School
22027012	11	Helena, MT 59602	Jefferson High School
22027013	11	Helena, MT 59601	Jefferson High School
22027014	1	Helena, MT 59601	Montana City School
22027015	8	Helena, MT 59602	Montana City School
22027016	5	Helena, MT 59602	Montana City School
22027017	1	Helena, MT 59602	Montana City School
22027018	8	Helena, MT 59601	Montana City School
22027019	1	Helena, MT 59602	Montana City School
22027020	K	Helena, MT 59601	Montana City School
22027021	8	Helena, MT 59601	Montana City School
22027022	8	Helena, MT 59602	Montana City School
22027023	K	Helena, MT 59602	Montana City School
22027024	8	Helena, MT 59601	Montana City School
22027025	1	Helena, MT 59602	Montana City School
22027026	8	Helena, MT 59602	Montana City School
22027027	2	Helena, MT 59602	Montana City School
22027028	7	Helena, MT 59602	Montana City School
22027029	8	Helena, MT 59602	Montana City School
22027030	5	Helena, MT 59602	Montana City School
22027031	PK	Helena, MT 59602	Montana City School
22027032	1	Helena, MT 59602	Montana City School
22027033	3	Helena, MT 59601	Montana City School
22027034	7	Helena, MT 59601	Montana City School
22027035	5	Helena, MT 59601	Montana City School
22027036	5	Helena, MT 59601	Montana City School
22027037	1	Helena, MT 59602	Montana City School

July 15, 2026

Discretionary Attendance Acknowledgements:

Unique ID	Grade	Address	District of Attendance
22027038	5	Helena, MT 59601	Montana City School
22027039	7	Helena, MT 59602	Montana City School
22027040	4	Helena, MT 59602	Montana City School
22027041	3	Helena, MT 59602	Montana City School
22027042	5	Helena, MT 59601	Montana City School
22027043	K	Helena, MT 59602	Montana City School
22027044	PK	Helena, MT 59602	Montana City School
22027045	K	Helena, MT 59601	Montana City School
22027046	2	Helena, MT 59602	Montana City School
22027047	K	Helena, MT 59602	Montana City School
22027048	2	Helena, MT 59602	Montana City School
22027049	K	Helena, MT 59602	Montana City School
22027050	3	Helena, MT 59601	Montana City School
22027051	8	Helena, MT 59602	Montana City School
22027052	K	Helena, MT 59601	Montana City School
22027053	2	Helena, MT 59601	Montana City School
22027054	6	Helena, MT 59602	Montana City School
22027055	PK	Helena, MT 59602	Montana City School
22027056	2	Helena, MT 59602	Montana City School
22027057	8	Helena, MT 59602	Montana City School
22027058	4	Helena, MT 59602	Montana City School
22027059	6	Helena, MT 59602	Montana City School
22027060	2	Helena, MT 59602	Montana City School
22027061	1	Helena, MT 59602	Montana City School
22027062	PK	Helena, MT 59602	Montana City School
22027063	2	Helena, MT 59602	Montana City School
22027064	4	Helena, MT 59601	Montana City School
22027065	K	Helena, MT 59602	Montana City School
22027066	K	Helena, MT 59602	Montana City School
22027067	1	Helena, MT 59602	Montana City School
22027068	6	Helena, MT 59602	Montana City School
22027069	1	Helena, MT 59602	Montana City School
22027070	8	Helena, MT 59601	Montana City School
22027071	5	Helena, MT 59601	Montana City School
22027072	7	Helena, MT 59601	Montana City School
22027073	8	Helena, MT 59602	Montana City School
22027074	5	Helena, MT 59601	Montana City School
22027075	5	Helena, MT 59601	Montana City School
22027076	K	Helena, MT 59601	Montana City School
22027077	1	Helena, MT 59601	Montana City School

July 15, 2026

Discretionary Attendance Acknowledgements:

Unique ID	Grade	Address	District of Attendance
22027078	1	Helena, MT 59601	Montana City School
22027079	8	Helena, MT 59602	Montana City School
22027080	4	Helena, MT 59602	Montana City School
22027081	3	Helena, MT 59602	Montana City School
22027082	K	Helena, MT 59602	Montana City School
22027083	2	Helena, MT 59601	Montana City School
22027084	1	Helena, MT 59602	Montana City School
22027085	K	Helena, MT 59602	Montana City School
22027086	3	Helena, MT 59602	Montana City School
22027087	8	Helena, MT 59602	Montana City School
22027088	1	Helena, MT 59602	Montana City School
22027089	MM	Helena, MT 59602	Montana City School
22027090	1	Helena, MT 59602	Montana City School
22027091	3	Helena, MT 59601	Montana City School
22027092	6	Helena, MT 59602	Montana City School
22027093	1	Helena, MT 59601	Montana City School
22027094	3	Helena, MT 59601	Montana City School
22027095	K	Helena, MT 59601	Montana City School
22027096	6	Helena, MT 59602	Montana City School
22027097	1	Helena, MT 59601	Montana City School
22027098	3	Helena, MT 59602	Montana City School
22027099	8	Helena, MT 59602	Montana City School
22027100	1	Helena, MT 59602	Montana City School
22027101	8	Helena, MT 59602	Montana City School
22027102	8	Helena, MT 59601	Montana City School
22027103	5	Helena, MT 59602	Montana City School
22027104	3	Helena, MT 59602	Montana City School
22027105	6	Helena, MT 59602	East Helena K-12
22027106	4	Helena, MT 59602	East Helena K-12
22027107	2	Helena, MT 59602	East Helena K-12
22027108	5	Helena, MT 59602	East Helena K-12
22027109	10	Helena, MT 59602	East Helena K-12
22027110	7	Helena, MT 59602	East Helena K-12
22027111	5	Helena, MT 59602	East Helena K-12
22027112	12	Helena, MT 59602	East Helena K-12
22027113	6	Helena, MT 59602	East Helena K-12
22027114	3	Helena, MT 59602	East Helena K-12
22027115	2	Helena, MT 59602	East Helena K-12
22027116	7	Helena, MT 59602	East Helena K-12
22027117	12	Helena, MT 59601	East Helena K-12

July 15, 2026

Discretionary Attendance Acknowledgements:

Unique ID	Grade	Address	District of Attendance
22027118	3	Helena, MT 59602	East Helena K-12
22027119	1	Helena, MT 59602	East Helena K-12
22027120	K	Helena, MT 59602	East Helena K-12
22027121	10	Helena, MT 59602	East Helena K-12
22027122	8	Helena, MT 59602	East Helena K-12
22027123	10	Helena, MT 59602	East Helena K-12
22027124	1	Helena, MT 59602	East Helena K-12
22027125	4	Helena, MT 59602	East Helena K-12
22027126	6	Helena, MT 59602	East Helena K-12
22027127	10	Helena, MT 59602	East Helena K-12
22027128	K	Helena, MT 59602	East Helena K-12
22027129	10	Helena, MT 59601	East Helena K-12
22027130	10	Helena, MT 59602	East Helena K-12
22027131	12	Helena, MT 59602	East Helena K-12
22027132	12	Helena, MT 59602	East Helena K-12
22027133	5	Helena, MT 59602	East Helena K-12
22027134	5	Helena, MT 59602	East Helena K-12
22027135	3	Helena, MT 59602	East Helena K-12
22027136	11	Helena, MT 59602	East Helena K-12
22027137	5	Helena, MT 59602	East Helena K-12
22027138	6	Helena, MT 59602	East Helena K-12
22027139	6	Helena, MT 59602	East Helena K-12
22027140	8	Helena, MT 59602	East Helena K-12
22027141	1	Helena, MT 59602	East Helena K-12
22027142	10	Helena, MT 59602	East Helena K-12
22027143	12	Helena, MT 59601	East Helena K-12
22027144	5	Helena, MT 59602	East Helena K-12
22027145	12	Helena, MT 59602	East Helena K-12
22027146	K	Helena, MT 59602	East Helena K-12
22027147	10	Helena, MT 59602	East Helena K-12
22027148	5	Helena, MT 59602	East Helena K-12
22027149	9	Helena, MT 59602	East Helena K-12
22027150	12	Helena, MT 59602	East Helena K-12
22027151	11	Helena, MT 59602	East Helena K-12
22027152	8	Helena, MT 59602	East Helena K-12
22027153	8	Helena, MT 59602	East Helena K-12
22027154	11	Helena, MT 59602	East Helena K-12
22027155	7	Helena, MT 59602	East Helena K-12
22027156	3	Helena, MT 59602	East Helena K-12
22027157	12	Helena, MT 59602	East Helena K-12

July 15, 2026

Discretionary Attendance Acknowledgements:

Unique ID	Grade	Address	District of Attendance
22027158	10	Helena, MT 59602	East Helena K-12
22027159	7	Helena, MT 59602	East Helena K-12
22027160	4	Helena, MT 59602	East Helena K-12
22027161	11	Helena, MT 59602	East Helena K-12
22027162	12	Helena, MT 59602	East Helena K-12
22027163	5	Helena, MT 59602	East Helena K-12
22027164	7	Helena, MT 59602	East Helena K-12
22027165	3	Helena, MT 59602	East Helena K-12
22027166	1	Helena, MT 59602	East Helena K-12
22027167	PK	Helena, MT 59602	East Helena K-12
22027168	12	Helena, MT 59602	East Helena K-12
22027169	11	Helena, MT 59602	East Helena K-12
22027170	10	Helena, MT 59602	East Helena K-12
22027171	10	Helena, MT 59602	East Helena K-12
22027172	12	Helena, MT 59602	East Helena K-12
22027173	10	Helena, MT 59602	East Helena K-12
22027174	1	Helena, MT 59602	East Helena K-12
22027175	7	Helena, MT 59602	East Helena K-12
22027176	7	Helena, MT 59602	East Helena K-12
22027177	10	Helena, MT 59602	East Helena K-12
22027178	12	Helena, MT 59602	East Helena K-12
22027179	8	Helena, MT 59602	East Helena K-12
22027180	K	Helena, MT 59602	East Helena K-12
22027181	12	Helena, MT 59602	East Helena K-12
22027182	12	Helena, MT 59602	East Helena K-12
22027183	4	Helena, MT 59602	East Helena K-12
22027184	12	Helena, MT 59602	East Helena K-12
22027185	7	Helena, MT 59602	East Helena K-12
22027186	7	Helena, MT 59602	East Helena K-12
22027187	11	Helena, MT 59602	East Helena K-12
22027188	10	Helena, MT 59602	East Helena K-12
22027189	12	Helena, MT 59602	East Helena K-12
22027190	11	Helena, MT 59601	East Helena K-12
22027191	4	Helena, MT 59602	East Helena K-12
22027192	10	Helena, MT 59602	East Helena K-12
22027193	12	Helena, MT 59602	East Helena K-12
22027194	2	Helena, MT 59602	East Helena K-12
22027195	6	Helena, MT 59602	East Helena K-12
22027196	8	Helena, MT 59602	East Helena K-12
22027197	10	Helena, MT 59602	East Helena K-12

July 15, 2026

Discretionary Attendance Acknowledgements:

Unique ID	Grade	Address	District of Attendance
22027198	12	Helena, MT 59602	East Helena K-12
22027199	8	Helena, MT 59602	East Helena K-12
22027200	2	Helena, MT 59602	East Helena K-12
22027201	10	Helena, MT 59602	East Helena K-12
22027202	9	Helena, MT 59602	East Helena K-12
22027203	6	Helena, MT 59602	East Helena K-12
22027204	PK	Helena, MT 59602	East Helena K-12
22027205	11	Helena, MT 59602	East Helena K-12
22027206	10	Helena, MT 59602	East Helena K-12
22027207	8	Helena, MT 59602	East Helena K-12
22027208	9	Helena, MT 59602	East Helena K-12
22027209	10	Helena, MT 59602	East Helena K-12
22027210	10	Helena, MT 59602	East Helena K-12
22027211	9	Helena, MT 59602	East Helena K-12
22027212	11	Helena, MT 59602	East Helena K-12
22027213	10	Helena, MT 59602	East Helena K-12
22027214	9	Helena, MT 59602	East Helena K-12
22027215	5	Helena, MT 59602	East Helena K-12
22027216	10	Helena, MT 59602	East Helena K-12
22027217	6	Helena, MT 59602	East Helena K-12
22027218	2	Helena, MT 59602	East Helena K-12
22027219	2	Helena, MT 59602	East Helena K-12
22027220	K	Helena, MT 59601	East Helena K-12
22027221	1	Helena, MT 59601	East Helena K-12
22027222	PK	Helena, MT 59602	East Helena K-12
22027223	PK	Helena, MT 59602	East Helena K-12
22027224	PK	Helena, MT 59602	East Helena K-12
22027225	1	Helena, MT 59602	East Helena K-12
22027226	4	Helena, MT 59602	East Helena K-12
22027227	4	Helena, MT 59602	East Helena K-12
22027228	4	Helena, MT 59602	East Helena K-12
22027229	9	Helena, MT 59601	East Helena K-12
22027230	5	Helena, MT 59602	East Helena K-12
22027231	2	Helena, MT 59602	East Helena K-12
22027232	10	Helena, MT 59601	East Helena K-12
22027233	12	Helena, MT 59602	East Helena K-12
22027234	8	Helena, MT 59602	East Helena K-12
22027235	1	Helena, MT 59602	East Helena K-12
22027236	2	Helena, MT 59602	East Helena K-12
22027237	11	Helena, MT 59602	East Helena K-12

July 15, 2026

Discretionary Attendance Acknowledgements:

Unique ID	Grade	Address	District of Attendance
22027238	12	Helena, MT 59602	East Helena K-12
22027239	6	Helena, MT 59602	East Helena K-12
22027240	8	Helena, MT 59602	East Helena K-12
22027241	11	Helena, MT 59602	East Helena K-12
22027242	4	Helena, MT 59602	East Helena K-12
22027243	4	Helena, MT 59602	East Helena K-12
22027244	12	Helena, MT 59602	East Helena K-12
22027245	7	Helena, MT 59602	East Helena K-12
22027246	5	Helena, MT 59602	East Helena K-12
22027247	12	Helena, MT 59602	East Helena K-12
22027248	12	Helena, MT 59602	Three Forks Public Schools

Helena School District #1

Warrants June 1 to 30, 2026

Direct Deposits:	\$ 7,874,752.90
Payroll Warrants:	70132601-70132640
Payroll Deduction:	69309326-69309349
Non-Check Payroll Deductions:	\$ 14,832,281.91
Non-Check Accts Payable Deductions:	\$ 5,169,238.13
Non-Check Accts Payable Deductions- HHS Extracurricular: \$0	
Claim Warrants:	69309129-69309594
HMS Middle School Student Activity Checks:	8848-8852
CRA Middle School Student Activity Checks:	17526-17537
Capital High Student Activity Checks:	25381-25420
Helena High Student Activity Checks:	37412-37452
Cancelled Warrants:	\$ 18,594.58

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 _____



Board of Trustees Work Session Meeting Part 1

Tuesday, May 26, 2026

4:00 p.m.

Central Elementary School and Teams

MINUTES

ATTENDEES

<i>Trustees</i>	<i>Others</i>
Jennifer Walsh, Vice Chair	Rex Weltz, Superintendent
Janet Armstrong, Trustee	Sam Holman, Business Director
Kay Satre, Trustee	Gary Myers, Director of Educational Technology
Jenny Murnane Butcher, Trustee	Nick Radley, Central Elementary School Principal
Keith Meyer, Trustee	Candice Delvaux, Executive Assistant
Linda Cleatus, Trustee	Keri Mizell, Human Resources Director
Lisa Cordingley, Trustee-Elect	Josh McKay, Assistant Superintendent
Keller Higbee, Trustee-Elect	Taylor Lassiter, Communications Specialist
	Todd Verrill, Facilities Director
	Dr. Kaitlyn Hess, Data & Federal Programs Director
	Dr. Justine Alberts, Assistant Superintendent
	Rich Franco, Human Resources Benefits Manager
	Katrina Chaney, Lewis & Clark County Superintendent
	Jane Shawn, HEA President
	Guests of the Public

I. CALL TO ORDER/PLEDGE OF ALLEGIANCE

Board Vice Chair Jennifer Walsh called the meeting to order at 4:01 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

Principal Nick Radley, Central Elementary School

Mr. Nick Radley, Principal of Central Elementary School, provided a comprehensive overview of the school and reviewed the pamphlet included in the agenda.

Demographics

Grade (FTE)	Enrollment – 410
Kindergarten (2)	44
Kindergarten Montessori (1)	18
1 st Grade (2)	43
2 nd Grade (2)	43
3 rd Grade (2)	53
Lower Montessori (2)	36
4 th Grade (2)	55
5 th Grade (2)	60
Upper Montessori (1)	25
Functional Life Skills (1)	11
Trailhead 1 (1)	11
Trailhead 2 (1)	11

Special Education: Students on an IEP

Speech Only: 59
Resource (including related services) 39
Trailhead (1 & 2): 22
Functional Life Skills: 11

Principal Radley provided an overview of Central Elementary School's leadership teams, family engagement initiatives, academic performance data, and the school's action plan goals for continuous improvement. He also addressed questions from the Board of Trustees regarding the information presented.

V. NEW BUSINESS

A. Consent Action Items

1. 4/28/26 Board of Trustees Work Session Meeting Minutes
2. Personnel Actions
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. Resolution to Dispose of Personal Property – Outdated, Unsuitable and Obsolete Instructional Materials & Equipment

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

Motion: Trustee Keith Meyer moved to approve the *Consent Action Items* as presented. Trustee Kay Satre seconded the motion.

Public Comment: None.

Vote: 6-0; motion carries unanimously.

B. Items for Action

1. **Approval and Ratification of the HPS-Carpenters Collective Bargaining Agreement for 2026-2027**

Ms. Keri Mizell, Human Resources Director, presented action item one, *Approval and Ratification of the HPS-Carpenters Collective Bargaining Agreement for 2026-2027*.

Background:

Pursuant to MCA 39-31-306, an agreement reached by the public employer and the exclusive representative must be reduced to writing and must be executed by both parties.

The Helena School District and the Western States Regional Council of Carpenters reached a tentative agreement on May 22, 2026. The District negotiation team recommends ratification.

The agreement was open for wages for the period of July 1, 2026, through June 30, 2027. A summary of the conditions of the contract are noted below. Upon the Board’s approval, a final copy will be made available electronically.

- A two and a half percent (2.5%) increase of \$.69 per hour to the base wage from \$27.53 per hour to \$28.22 per hour for the 2026-2027 fiscal year.
- A retention bonus of \$1,000 to be paid in installments of \$500 on the paychecks in July and December 2026.
- The estimated salary cost of this settlement is \$5,457 for the 2026-2027 fiscal year.

Considerations:

- HPS and the Carpenters have a collaborative relationship and productive negotiations history.
- This agreement continues to bring parity to the bargaining units within HSD that work together on facility projects.
- This agreement supports the directive of the Board to support our staff members and address issues relative to the district budget.

Superintendent recommendation:

Approve and ratify the collective bargaining agreement as agreed upon between HPS and Carpenters.

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

Board Vice Chair Jennifer Walsh entertained a motion to approve action item one: *Approval and Ratification of the HPS-Carpenters Collective Bargaining Agreement for 2026-2027.*

Motion: Trustee Linda Cleatus moved to approve action item one: *Approval and Ratification of the HPS-Carpenters Collective Bargaining Agreement for 2026-2027.* Trustee Jenny Murnane Butcher seconded the motion.

Public Comment: None.

Vote: 6-0; motion carries unanimously.

2. **Smith Elementary School Photovoltaic System Project Award**

Mr. Todd Verrill, Facilities Director, presented action item two, *Smith Elementary School Photovoltaic System Project Award*. The Board reviewed the recommendation to award the Smith Elementary School Photovoltaic System Project to Bozeman Green Build. The project includes the installation of a 57.75 kW solar photovoltaic system on the gymnasium roof. Mr. Verrill reported that Bozeman Green Build submitted the lowest responsive bid of \$83,686 and is a qualified contractor capable of completing the project before the start of the 2026–2027 school year. Mr. Verrill addressed questions from the Board of Trustees regarding the information presented.

Board Vice Chair Jennifer Walsh entertained a motion to approve action item two: *Smith Elementary School Photovoltaic System Project Award*.

Motion: Trustee Kay Satre moved to award the Smith Elementary School Photovoltaic System Project to Bozeman Green Build as presented. Trustee Janet Armstrong seconded the motion.

Public Comment: None.

Vote: 5-0; motion carries unanimously. (*Please note that Trustee 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*).

3. Canvass of Election Results and Issue Certificates of Election
a. Canvass Election Results and Issue Certificates of Election (Elementary)
b. Canvass Election Results and Issue Certificates of Election (High School)

Ms. Sam Holman, Business Director, presented action items 3a and 3b: *Canvass of Election Results and Issue Certificates of Election, a. Canvass Election Results and Issue Certificates of Election (Elementary), b. Canvass Election Results and Issue Certificates of Election (High School) to the Board of Trustees.*

Background:

The annual regular school election was held on Tuesday, May 5, 2026. 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 a trustee election, the certificate must be issued to the elected trustee and the county superintendent, designating the term of the trustee position. 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 report on May 13, 2026.
 - Highlights:
 - Total registered voters in the elementary school were 40,496. Total ballots issued were 35,059. Total ballots tabulated were 16,100 with a total voter turnout of 39.76%.
 - Total registered voters in the high school were 42,784. Total ballots issued were 37,088. Total ballots tabulated were 17,042 with a total voter turnout of 39.83%.
- The election results were also provided by the county elections office on May 13, 2026.
 - Highlights:
 - The elementary general fund levy proposition failed by a margin of 57.27% (6,858 FOR, 9,192 AGAINST).
 - The elementary technology levy proposition failed by a margin of 60.23% (6,390 FOR, 9,677 AGAINST).
 - The high school technology levy proposition failed by a margin of 59.83% (6,832 FOR, 10,177 AGAINST).
- Katrina Chaney, County Superintendent of Schools will administer the oath of office to elected trustees.

Superintendent recommendation:

Canvass the election results, issue the certificates of election, and administer the oath of office to elected trustees.

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

Board Vice Chair Jennifer Walsh entertained a motion to approve action item 3a: *Canvass Election Results and Issue Certificates of Election (Elementary)*.

Motion: Trustee Jenny Murnane Butcher moved to canvass the election results for the elementary district. The motion was amended to include issuing certificates of election. The amended motion was to canvass the election results and issue certificates of election for the elementary district. Trustee Keith Meyer seconded the motion.

Public Comment: None.

Vote: 5-0; motion carries unanimously. *(Please note that Trustee 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).*

Board Vice Chair Jennifer Walsh entertained a motion to approve action item 3b: *Canvass Election Results and Issue Certificates of Election (High School)*.

Motion: Trustee Kay Satre moved to canvass the election results and issue certificates of election for the high school district. Trustee Janet Armstrong seconded the motion.

Public Comment: None.

Vote: 6-0; motion carries unanimously.

C. Oath of Office for Elected Trustees and District Clerk

Ms. Jennifer Walsh, Mr. Keith Meyer, Ms. Lisa Cordingley, and Mr. Keller Higbee recited the Oath of Office and were officially sworn in as Trustees by Ms. Katrina Chaney, Lewis & Clark County Superintendent of Schools. Ms. Sam Holman recited the Oath of Office and was officially sworn in as District Clerk by Ms. Chaney.

VI. BOARD OR SUPERINTENDENT COMMENTS

There were no final Board or Superintendent comments.

VII. ADJOURNMENT

Board Vice Chair Jennifer Walsh adjourned the meeting at 4:33 p.m.

Candice Delvaux, Recording Secretary



Board of Trustees Work Session Meeting Part 2

Tuesday, May 26, 2026

Central Elementary School and Teams

*Part 1 of the Work Session began at 4:00 p.m. Part 2 of the Work Session commenced immediately following Part 1.

MINUTES

ATTENDEES

<i>Trustees</i>	<i>Others</i>
Jennifer Walsh, Vice Chair	Rex Weltz, Superintendent
Janet Armstrong, Trustee	Sam Holman, Business Director
Kay Satre, Trustee	Gary Myers, Director of Educational Technology
Jenny Murnane Butcher, Trustee	Nick Radley, Central Elementary School Principal
Keith Meyer, Trustee	Candice Delvaux, Executive Assistant
Lisa Cordingley, Trustee	Keri Mizell, Human Resources Director
Keller Higbee, Trustee	Josh McKay, Assistant Superintendent
	Taylor Lassiter, Communications Specialist
	Todd Verrill, Facilities Director
	Dr. Kaitlyn Hess, Data & Federal Programs Director
	Dr. Justine Alberts, Assistant Superintendent
	Rich Franco, Human Resources Benefits Manager
	Katrina Chaney, Lewis & Clark County Superintendent of Schools
	Jane Shawn, HEA President
	Guests of the Public

I. CALL TO ORDER

Board Vice Chair Jennifer Walsh called part two of the meeting to order at 4:39 p.m.

II. REVIEW OF AGENDA

Board Vice Chair Jennifer Walsh reviewed part two of 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.

Superintendent Weltz recognized Ms. Katrina Chaney, Lewis & Clark County Superintendent of Schools, noting that this would be her final swearing-in prior to her retirement in December after 12 years of service. He expressed appreciation for her contributions and highlighted the strong collaborative relationship between the county and the school district, emphasizing their shared commitment to serving students. Superintendent Weltz also thanked her for her service and dedication.

IV. NEW BUSINESS

A. Items for Action

1. Organization of the Board of Trustees, Election of Officers, and Appointment of Clerk

- a. Appointment of Board Chair**
- b. Appointment of Board Vice Chair**
- c. Appointment of District Clerk**

1a. Motion: Trustee Janet Armstrong moved to appoint Trustee Jennifer Walsh as Board Chair. Trustee Keith Meyer seconded the motion.

Public Comment: None.

Vote: 7-0; motion carries unanimously.

1b. Motion: Trustee Jenny Murnane Butcher moved to appoint Trustee Kay Satre as Board Vice Chair. Trustee Keith Meyer seconded the motion.

Public Comment: None.

Vote: 7-0; motion carries unanimously.

1c. Motion: Trustee Kay Satre moved to appoint Ms. Sam Holman as District Clerk. Trustee Janet Armstrong seconded the motion.

Public Comment: None.

Vote: 7-0; motion carries unanimously.

B. Item for Information

1. Plan Year 2026-2027 Premium Rates

The presentation of the proposed 2026–2027 Health Benefits Plan Premium Rates

was postponed due to technical difficulties that prevented the presenter from participating effectively via Microsoft Teams. The Board agreed to defer the presentation and discussion to a future meeting.

V. BOARD OR SUPERINTENDENT COMMENTS

Superintendent Weltz welcomed the newly elected Trustees and thanked Ms. Katrina Chaney for her service. He noted that as the newly elected Trustees begin their terms, staff will provide additional background and context on agenda items to support their understanding of ongoing work. He also shared that a Board orientation will be scheduled to introduce district departments and staff and provide an overview of district operations.

VI. ADJOURNMENT

Board Chair Jennifer Walsh adjourned the meeting at 5:00 p.m.

Candice Delvaux, Recording Secretary



Superintendent

Rex Wertz
324-2001

Business Director

Sam Holman
324-2040

Board of Trustees Special Board Meeting

Lincoln Center
1325 Poplar St., Helena, MT 59601
and via Microsoft Teams

Tuesday, June 2, 2026
12:00 p.m.

MINUTES

ATTENDANCE – Present unless otherwise noted.

Jennifer Walsh, Chair
Jenny Murnane Butcher,
Trustee
Kay Satre, Vice Chair
Lisa Cordingley, Trustee
Janet Armstrong, Trustee
Keith Meyer, Trustee
Keller Higbee, Trustee
Siobhan Hathhorn, Trustee
Rex Wertz, Superintendent
Josh McKay, Assistant Superintendent
Gary Myers, Director of Educational
Technology
Keri Mizell, Human Resources Director
Jane Shawn, HEA President
Dr. Justine Alberts, Assistant Superintendent
Rich Franco, Human Resources Benefits Manager
Shane Swandal, Hulteng CCM, Inc.
Alec Pinero, Hulteng CCM, Inc.
Several HPS Staff Members

I. CALL TO ORDER/PLEDGE OF ALLEGIANCE

Board Chair Jennifer Walsh called the meeting to order at 12:00 p.m., and the Board participated in the Pledge of Allegiance.

II. REVIEW OF AGENDA

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

The Board of Trustees moved on to hear general public comment.

III. GENERAL PUBLIC COMMENT

There was no general public comment.

IV. NEW BUSINESS

A. Consent Action Item

1. Personnel Actions

Board Chair Jennifer Walsh entertained a motion for the approval of the consent action item.

Motion: Trustee Siobhan Hathhorn moved to approve the consent action item. Trustee Janet Armstrong seconded the motion.

Public Comment: None.

Vote: 8-0; motion carries unanimously.

B. Items for Action

- 1. Asbestos Abatement Award – Capital High School**
- 2. Asbestos Abatement Award – Helena High School**

The Board reviewed recommendations for the Summer 2026 asbestos abatement projects at Capital High School and Helena High School. Mr. Alec Pinero with Hulteng, CCM, Inc. reported that the work will prepare designated areas at both schools for upcoming bond construction activities. Following a competitive bidding process, Environmental Contractors submitted the lowest responsible bid for the Capital High School project in the amount of \$205,000, and Safetech submitted the lowest responsible bid for the Helena High School project in the amount of \$102,200. Mr. Pinero addressed questions from the Board of Trustees regarding the information presented.

Board Chair Jennifer Walsh entertained a motion for item for action 1: *Asbestos Abatement Award – Capital High School*.

B.1. Motion: Trustee Kay Satre moved to approve the Asbestos Abatement Award for Capital High School to Environmental Contractors. Trustee Keith Meyer seconded the

motion.

Public Comment: None.

Vote: 8-0; motion carries unanimously.

Board Chair Jennifer Walsh entertained a motion for item for action 2: *Asbestos Abatement Award – Helena High School*.

B.2. Motion: Trustee Siobhan Hathhorn moved to approve the Asbestos Abatement Award for Helena High School to Safetech. Trustee Janet Armstrong seconded the motion.

Public Comment: None.

Vote: 8-0; motion carries unanimously.

That concluded the Items for Action, and the Board of Trustees moved on to review the Items for Information.

C. Items for Information

1. Plan Year 2026-2027 Premium Rates

Mr. Rich Franco, Human Resources Benefits Manager, reviewed the proposed 2026–2027 employee health benefit premium rates with the Board of Trustees. He explained the actuarial methodology used to develop the premium projections, including claims experience, credibility weighting, industry trend assumptions, and administrative and stop-loss costs. Mr. Franco reviewed several premium increase scenarios considered by the Health Benefits Committee, noting that the committee evaluated blended medical and pharmacy trend assumptions before recommending a 15.5% premium increase for the 2026–2027 plan year.

Mr. Franco also reviewed the funding projections for the dental and vision plans, noting that current funding levels provide flexibility to help offset a portion of the medical premium increase. He reported that the Health Benefits Committee approved the 15.5% premium recommendation by a 6–4 vote after careful consideration of the long-term financial sustainability of the health plan. He further noted that participation in the Bridged Health Alliance Trust is expected to generate significant savings, reducing what otherwise could have been substantially higher premium increases.

Trustees asked clarifying questions regarding administrative and consulting fees, and Mr. Franco explained that those costs have remained stable due to longstanding vendor partnerships. The Board and administration also discussed the importance of ongoing communication with employees regarding the premium recommendation, including potential informational meetings in the fall. The proposed premium rates will be presented to the Board for consideration and approval at a future Board meeting.

2. Owner's Construction Representative Projects Update

Mr. Shane Swandal, Owner's Representative with Hulteng, CCM, Inc., provided an update on the District's bond construction projects and procurement activities. He reviewed the public

bidding process for upcoming project components, explaining that while General Contractor/Construction Manager (GCCM) teams have been selected through a competitive qualifications process, all individual project scopes of work will continue to be publicly procured in accordance with District requirements. Mr. Swandal also reviewed opportunities for contractors to participate in upcoming bid packages through the District's website and the Builders Exchange, noting that bid opportunities and contract awards will remain publicly available. Trustees discussed the importance of providing accessible information to community members regarding bond expenditures and project progress. Throughout the presentation, Mr. Swandal addressed Trustee questions related to the procurement process, public access to bid information, and project communications. Trustees also inquired about the Capital High School kitchen project. Administration confirmed that the existing kitchen will remain fully operational until the new facility is completed, with the new kitchen anticipated to open by August 2027. Administration also noted recent progress with required City approvals and discussed the importance of communicating the construction timeline to the public to address community questions.

V. BOARD/SUPERINTENDENT COMMENTS

During Board and Superintendent Comments, Superintendent Wertz discussed the District's continued efforts to strengthen data and assessment practices to support student learning and achievement while also meeting increasing state reporting requirements. He noted that additional information regarding the District's teaching and learning priorities and student achievement goals for the 2026–2027 school year will be presented during the July Board meeting as part of Trustee onboarding and strategic planning. Trustees discussed the importance of the newly approved Data and Assessment Administrator position in supporting both state compliance and instructional improvement. Board members also noted that the District's administrative staffing levels remain lean and comparable to similarly sized districts.

VI. ADJOURNMENT

Board Chair Jennifer Walsh adjourned the meeting at 12:59 p.m.

Candice Delvaux, Recording Secretary

Date

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.B.1.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☒ Items for Action

☐ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: Item for Action
1. Approval of the Health Benefits Committee’s Recommendation for the Plan Year 2026 – 2027 Premium Rates

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

Board of Trustees

Approval of the Health Benefits Committee's Recommendation for Plan Year 2026–2027 Premium Rates



IV. NEW BUSINESS

B. Item for Action

1. Approval of the Health Benefits Committee's Recommendation for Plan Year 2026–2027 Premium Rates

Background:

The Health Benefits Committee has met multiple times with representatives from Bridged Health Alliance and Alliant to provide a recommendation that provides long-term sustainability of the District's self-funded health plan and the financial impact on members.

Based on a significant plan liability funded through a different account (one-time funding) and additional clarity of the Bridget Health Alliance's statewide provider network contracts, the Health Benefits Committee recommends an increase of 8.5% to the 26-27 plan year premiums.

Superintendent recommendation:

Approve the Health Benefits Committee recommendation of an 8.5% increase to health insurance premiums for the 26-27 plan year (October 1, 2026 – September 30, 2027).

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Item IV.B.2.

Meeting Date: 7/15/2026

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☒ Items for Action

☐ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: Item for Action
 2. Approval of the Transition to an Administrative Step Salary Matrix

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

Board of Trustees

Approval of the Transition to an Administrative Step Salary Matrix



IV. NEW BUSINESS

B. Item for Action

2. Approval of the Transition to an Administrative Step Salary Matrix Effective July 1, 2026

Background:

The District's current compensation structure for administrators—including assistant principals, principals, directors, and assistant superintendents—is based on a traditional single-cell salary schedule.

As part of the comprehensive compensation study completed by Communication and Management Services (CMS), LLC, a transition to a step-based salary matrix was recommended. A step salary matrix is a market aligned compensation system that improves recruitment, retention, and long-term budgeting and supports the District's compensation philosophy.

Current administrators will be placed on the matrix at the step that is closest to their current salary, not below. No employee will lose pay as part of this transition.

The anticipated fiscal note is \$33,000 for implementation for the 26-27 fiscal year.

Superintendent recommendation:

Approve the transition to an administrative step salary matrix effective July 1, 2026.

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Item IV.B.3.

Meeting Date: 7/15/2026

- ☐
- Call To Order/Pledge of Allegiance/Introductions

☐☐☐☒☐☐☐

Item Title: Item for Action
3. Approval and Ratification of the HPS-International Brotherhood of Electrical Workers (IBEW) Local 233 Collective Bargaining Agreement for 2026-2028

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

Board of Trustees

Approval of HPS – Electrician Collective Bargaining Agreement



IV. NEW BUSINESS

B. Items for Action

3. Approval and Ratification of the HPS-International Brotherhood of Electrical Workers (IBEW) Local 233 Collective Bargaining Agreement for 2026-2028

Background:

Pursuant to MCA 39-31-306, an agreement reached by the public employer and the exclusive representative must be reduced to writing and must be executed by both parties.

The Helena School District and IBEW reached a tentative agreement on June 11, 2026. The District negotiation team recommends ratification.

The two (2) year agreement was open for language and wages for July 1, 2026, through June 30, 2028. A summary of the conditions of the contract are noted below. Upon the Board's approval, a final copy will be made available electronically.

- A two and a half percent (2.5%) increase of \$0.91 per hour to the base wage from \$36.36 per hour to \$37.27 per hour for the 2026-2027 fiscal year.
- A retention bonus of \$1,000 to be paid in installments of \$500 on the paychecks in July and December 2026.
- The estimated salary cost of this settlement is \$2,955 for the 2026-2027 fiscal year.

Considerations:

- HPS and IBEW have a collaborative relationship and productive negotiations history.
- This agreement continues to bring parity to the bargaining units within HSD that work together on facility projects.
- This agreement supports the directive of the Board to support our staff members and address issues relative to the District budget.

Superintendent recommendation:

Approve and ratify the collective bargaining agreement as agreed upon between HPS and IBEW.

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.B.4.

- ☐
- Call To Order/Pledge of Allegiance/Introductions

☐☐☐☒☐☐☐

Item Title: Item for Action
4. Character Strong Curriculum Approval

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



CharacterStrong, LLC
150 Rouse Blvd, Suite 210
Philadelphia, PA 19112
billing@characterstrong.com
characterstrong.com

Estimate # EST4255

Date: 7/1/2026

Expiration Date: 12/31/2026

Bill To

Helena Public Schools
1325 Poplar St
Helena MT 59601-0939
United States

Ship To

Helena Public Schools
1325 Poplar St
Helena MT 59601-0939
United States

TOTAL

\$204,049.00

Item	Quantity	Service Start - End	Gross Amount	Discount	Net Amount
Tier 1 Curriculum PFP License School-wide License for the Elementary Curriculum, PurposeFull People Pre-K through 5th - A Social, Emotional, and Character Development Curriculum	10	10/1/2026 - 9/30/2031	\$199,950.00	\$87,150.00	\$112,800.00
Tier 2 Curriculum MS License School-wide Tier 2 License for CharacterStrong Character Development lessons for Secondary Grades - 6-8	2	10/1/2026 - 9/30/2031	\$19,990.00	\$5,990.00	\$14,000.00
Tier 2 Curriculum Elem License School-wide Tier 2 License for CharacterStrong Character Development lessons for Elementary	10	10/1/2026 - 9/30/2031	\$99,950.00	\$29,950.00	\$70,000.00
In Person 3 Hour PD - Elem Foundation CS40030 In Person 3 Hour PD - Elem Foundation	1	10/1/2026 - 9/30/2027	\$5,250.00	\$0.00	\$5,250.00
Custom Virtual PD Custom Virtual PD	1	10/1/2026 - 9/30/2027	\$1,999.00	\$0.00	\$1,999.00

Pay Online or Send Remittance to:
CharacterStrong
PO Box 12415
Newark, NJ 07101-3515

Subtotal	\$204,049.00
Sales Tax	\$0.00
Total	\$204,049.00

If payment requires board approval or you have other unique circumstances that might prevent you from processing payment before the due date, please reach out to billing@characterstrong.com and we'd be happy to discuss options.

Contracts, purchase orders, and payments can be mailed to CharacterStrong, LLC at the address above, or emailed to billing@characterstrong.com.

EIN: 81-4174372 UBI: 604-043-554

CharacterStrong's Cancellation Policies can be found at:
<https://characterstrong.com/resources/cancellation-policies>

Helena Public Schools | License Pricing Proposal (2026)

Product	Qty	List Price	Adjusted Rate (5yr)	Annual Total (5yr)	5yr Total
CURRICULUM LICENSES					
CharacterStrong Tier 1 Elementary	10	\$3,999.00	\$2,256.00	\$22,560.00	\$112,800.00
CharacterStrong Tier 2 Elementary ❖ Renewal	10	\$1,999.00	\$1,400.00	\$14,000.00	\$70,000.00
CharacterStrong Tier 2 Middle School ❖ Renewal	2	\$1,999.00	\$1,400.00	\$2,800.00	\$14,000.00
PROFESSIONAL DEVELOPMENT — One-Time Investment					
In-Person 3-Hour Tier 1 Foundation Training	1	\$5,250.00	One-Time	\$5,250.00	\$5,250.00
Virtual 2-Hour Tier 2 Training	1	\$1,999.00	One-Time	\$1,999.00	\$1,999.00
Total Investment				\$46,609.00	\$204,049.00
❖ Tier 2 reflects a renewal of Helena's existing contract at a bundled rate of \$1,400/license.					

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Item IV.B.5.

Meeting Date:	7/15/2026
☐	Call To Order/Pledge of Allegiance/Introductions
☐	Review of Agenda
☐	General Public Comment
☐	Consent Action Items
☒	Items for Action
☐	Items for Information
☐	Board/Superintendent Comments
☐	Adjournment

Item Title: Item for Action
5. Approval of Mount Ascension Elementary and Middle School Removal from Charter Status

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



Helena Public Schools

A great place to learn

Josh McKay
Assistant Superintendent
jmckay@helenaschools.org
Phone (406) 324-2004

Lincoln Center
1325 Poplar St.
Helena, Montana 59601
Fax (406) 324-2022

Date: 07/10/2026

Dear Helena School District Board of Trustees,

Topic: Charter School Goals and Adjustments

This presentation, conversation, and action item will contain 3 parts. Part 1 is the explanation of the documents and process with our charter school annual performance reports. Part 2 is dedicated to explaining the change in process for the board with charter schools in the coming year. Part 3 is the goal adjustments and recommendation for your consideration for action.

Part 1

Background Information for the Presentation and Discussion:

The attachments after this cover page are the source documents for the presentation and discussion. These pages are also found on the Board of Education Website via the link below.

<https://bpe.mt.gov/2025-26-Compiled-Performance-Report.pdf>

Pages 106 through 115 of the Public Charter School Compiled Performance Report

Part 2

Explanation of changes to local Board of Trustees process in board meeting regarding Charter Schools:
Trustees will see regular Charter School reports as “consent action items” in the coming year in board packets.

Part 3

Goal Adjustments

PAL Charter Goal Adjustment:

New PAL Goal 1:

At least 90% of new students (yearly) will succeed in graduating through the orientation phase of learning at PAL and presenting to their adult/or parent their success by the end of the school year.

Former Goal 1: Student Graduation (edited by BPE staff, Fall 2025)

PAL aims for at least 24 new students to successfully complete the program and graduate by the end of the school year, including demonstrating their learning and progress through a final presentation to a parent or adult.

Original Goal 1 of Charter Contract:

At least 24 new students will succeed in graduating through the orientation phase of learning at PAL and presenting to their adult/or parent their success by the end of the school year.

Mount Ascension High School Goal Adjustment:

New Mount Ascension High School Goal 2: Postsecondary Readiness

Mount Ascension High School aims for at least 90% of graduating students to complete a post-graduation action plan which describes their connection to workforce, career, or post-secondary study.

Former Goal 2: Accelerated Credit Attainment

Mount Ascension aims for at least 20 students to earn credits at an accelerated rate compared to their prior academic progress by the end of the school year.

Action Item

Mount Ascension Elementary and Middle School Recommendation for Action:

Withdraw the Mount Ascension Learning Academy Grades 1 to 8 from Charter status, reserve the right to reinstate should conditions change.

Continue Explore School programming but not in Charter School status. Online Middle School students will be served through Montana Digital Academy, but not in Charter Status. Both programs would be collecting ANB funding for the partial enrollments/full time enrollments. Basic Entitlement dollars have not been received due to enrollment being lower than the threshold. Students/ and Families also choose to not participate in state testing which causes low rankings from the state on these charters. The enrollment / state- testing/ science focused instruction (not ELA/Math) has been causing low rankings. Reserving the right to reinstate to charter contract should conditions change, for example: more community desire to participate, more expansion opportunities, less state testing requirements. Etc.

Sincerely,



Josh McKay
Assistant Superintendent
Grades 6-12 and Adult Education
Helena Public Schools
(406) 324-2004



Montana Board of Public Education

Montessori Charter School 2026 Annual Performance Report

INTRODUCTION

As outlined in 20-6-809, MCA, the Board of Public Education must annually publish a performance report for each public charter school under its purview aligned with the Public Charter School Performance Framework. The report summarizes the school's academic performance, financial reporting, and organizational performance utilizing the most recent data available for the year in review. The Annual Performance Report also provides a summary of the mission of the charter school and enrollment demographics.

The Board of Public Education is committed to serving and strengthening Montana's system of free quality public elementary and secondary schools, including public charter schools. This Annual Performance Report is produced in order to:

1. Provide timely information to the charter school on its performance relative to the standards and expectations established by applicable federal and state law and the charter contract.
2. Identify the school's strengths and any areas needing improvement.
3. Provide information that enables the community and the public to understand the school's performance.

SCHOOL OVERVIEW

School Name	Montessori Charter School
School Location	Helena, MT
Grades Served	K-5
School Mission	Educate, engage, and empower each student to maximize their individual potential with knowledge, skills, and character essential to being a responsible citizen and life-long learner. This mission will be supported through the wise use of resources to meet students' needs, regardless of interests and talents. Students, families, educators, and the community are committed to sharing the responsibility for creating a student-centered educational community that acknowledges learning a life-long process.
School and Mission Specific Goals	Helena Montessori Charter School has established goals focused on student promotion and development of self-directed learning skills aligned to the Montessori model. Goal 1: Student Promotion Helena Montessori aims for at least 180 students to participate in the Montessori program and earn promotion to the next grade level by the end of the school year. Goal 2: Self-Directed Learning: Helena Montessori aims for at least 144 students to demonstrate proficiency in self-correction and self-assessment, as measured through teacher-developed classroom assessments.
Elementary School Enrollment	215
Total Enrollment in 2026	215

2026 PERFORMANCE FRAMEWORK OVERVIEW

For each measure in this report, the school receives one of the ratings described below:

RATING	DESCRIPTION
Exceeds Standard	This rating is reserved for performance that far exceeds expectations, demonstrating exceptional performance on a particular measure. This rating may be used in the academic framework, but it is not typically used in the financial or organizational framework.
Meets Standard	The target for this rating category sets the expectation for charter school performance in all measures in all frameworks—academic, financial, and organizational. Schools earning this rating on a particular measure are performing well in that area.
Approaches Standard	Schools with this rating are approaching but have not fully met expectations for performance on a given measure. While these schools have achieved some of the minimum expectations on the measure in question, these schools may be subject to further analysis and potentially closer monitoring. This rating may be used for academic measures and qualitative measures in the organizational and financial frameworks.
Does Not Meet Standard	Schools with this rating on a measure are performing below the authorizer's expectations, and the school is subject to further analysis, closer monitoring, and possibly intervention. This rating is used on all measures in all frameworks.

This section provides an overview of the school's performance across the reporting years reviewed on a variety of academic, financial, and organizational measures the school is accountable for achieving, as established by applicable federal and state law and the charter contract.

Academic Performance	2024-2025	2025-2026
Mission or School-Specific Goal(s)	Meets Standard	Meets Standard
Overall Math Proficiency and Growth	Meets Standard	Meets Standard
Overall ELA Proficiency and Growth	Meets Standard	Meets Standard
Subgroup Math Proficiency and Growth	Approaches Standard	Meets Standard
Subgroup ELA Proficiency and Growth	Approaches Standard	Meets Standard
Attendance	Applicable next year	Meets Standard
Student Engagement	Meets Standard	Exceeds Standard
Support for Transitions	Meets Standard	Meets Standard
Post-Secondary Readiness	High School only	High School only
Financial Performance		
Financial Performance and Stability	Meets Standard	Meets Standard
Recurrent Enrollment	Applicable next year	Meets Standard
Organizational Performance		
Charter Governing Board Performance and Stewardship	Meets Standard	Meets Standard

*Adapted from the NACSA Annual Report Toolkit and Guidance

SUMMARY OF OPEN-ENDED QUESTIONS

As part of the Public Charter School Performance Framework, schools were asked to report on five open-ended questions to provide the Board of Public Education with additional context.

How has the public charter school prioritized innovation different from a program that the school district could operate or currently operates without the public charter designation?
Montessori is an innovative method of education that is based on self-directed activity, hands-on learning, and collaborative peer coaching. It is an educational approach which offers age-appropriate activities to guide children's learning while allowing them to make creative choices. The Montessori method focuses on independence and rigorous, self-motivated growth for children in all areas of their development.

- Each child is valued as a unique individual. Montessori education recognizes that children learn in different ways and accommodates all learning styles. Students are free to learn at their own pace, advancing as they are ready, guided by the teacher and an individualized learning plan.
- Beginning at an early age, Montessori nurtures order, concentration, and independence. Intentional classroom design, materials, and daily routines support the student's emerging "self-regulation" (the ability to educate oneself, and to think about what one is learning) in toddlers through adolescents.
- Students are part of a close, caring community. The multi-age classroom – typically spanning 3 years – re-creates a family structure. Older students enjoy stature as mentors and role models and reinforce their own learning by teaching concepts they have already mastered; younger children feel supported and gain confidence about the challenges ahead through observation. Teachers model respect, loving kindness, and peaceful conflict resolution.
- Montessori students enjoy freedom within limits. Working within parameters set by their teachers and the classroom community, students are active participants in deciding what their focus of learning will be.
- Students are supported in becoming active seekers of knowledge. Teachers provide environments in which students have the freedom and the tools to pursue answers to their own questions. Internal satisfaction drives the child's curiosity and interest and results in joyous learning that is sustainable over a lifetime.
- Self-correction and self-assessment are an integral part of the Montessori classroom approach. As they mature, students learn to look critically at their work and become adept at recognizing, correcting, and learning from their errors.

Student achievement will be assessed on an ongoing basis. It will consider the subject matter, the grade level, and the students' individual needs. The assessment practices will align with learning objectives and state standards, ensuring that students are achieving the intended outcomes, and the assessments will inform instructional decisions and support student growth.

Montessori Charter is innovating through the Montessori method of individualized learning and individualized pacing all through a personalized student work plan

Why is the public charter school innovating? What are the student needs in the community that are trying to be met?

Montessori is an innovative method of education that is based on self-directed activity, hands-on learning, and collaborative peer coaching. It is an educational approach which offers age-appropriate activities to guide children's learning while allowing them to make creative choices. The Montessori method focuses on independence and rigorous, self-motivated growth for children in all areas of their development. Each child is valued as a unique individual. Montessori education recognizes that children learn in different ways and accommodates all learning styles. Students are free to learn at their own pace, advancing as they are ready, guided by the teacher and an individualized learning plan. Beginning at an early age, Montessori nurtures order, concentration, and independence. Intentional classroom design, materials, and daily routines support the student's emerging "self-regulation" (the ability to educate oneself, and to think about what one is learning) in toddlers through adolescents. Students are part of a close, caring community. The multi-age classroom – typically spanning 3 years – re-creates a family structure. Older students enjoy stature as mentors and role models and reinforce their own learning by teaching concepts they have already mastered; younger children feel supported and gain confidence about the challenges ahead through observation. Teachers model respect, loving kindness, and peaceful conflict resolution.

Montessori students enjoy freedom within limits. Working within parameters set by their teachers and the classroom community, students are active participants in deciding what their focus of learning will be.

Students are supported in becoming active seekers of knowledge. Teachers provide environments in which students have the freedom and the tools to pursue answers to their own questions. Internal

satisfaction drives the child's curiosity and interest and results in joyous learning that is sustainable over a lifetime.

Self-correction and self-assessment are an integral part of the Montessori classroom approach. As they mature, students learn to look critically at their work and become adept at recognizing, correcting, and learning from their errors.

Student achievement will be assessed on an ongoing basis. It will consider the subject matter, the grade level, and the students' individual needs. The assessment practices will align with learning objectives and state standards, ensuring that students are achieving the intended outcomes, and the assessments will inform instructional decisions and support student growth.

How is the public charter school flexible and nimble in response to the needs of students?

Student instruction and learning is flexible and nimble in the constructs of the Montessori Charter. Students learn at high rates of proficiency in math and ELA in the charter. Meeting students' needs are the core of the instructional model with individuality as the central determining factor.

What roadblocks or challenges is the public charter school encountering in efforts to innovate in the public charter school?

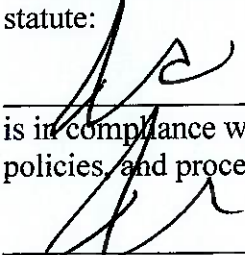
Expansion of the charter is limited by funding challenges. The basic entitlement for the elementary is too small for facility and start-up costs. Even though the parent demand is high. Instructionally, the Montessori Charter utilizes unique teaching practices, philosophy, and curriculum.

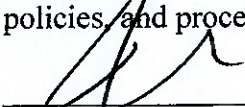
What have you learned, and what goals do you want to set moving forward?

We have learned that this charter school produces very high level of learners. We want to continue the high level of learning outcomes with this school. As a goal we will continue to strategize for expansion, but realize funding is a severe limitation to future growth.

STATEMENT OF ASSURANCES:

As outlined in 7.1.3 and 7.1.4 of the Charter Contract, the Charter Governing Board must annually submit to the Board of Public Education a statement of assurances relating to compliance with the Charter Contract and applicable law. The chair of the Charter Governing Board shall initial the following statements of assurance that the public charter school is in compliance with requirements outlined in the Charter Contract and applicable statute:

 Helena School District Montessori Charter School
is in compliance with the provisions in Title 20 of Montana Code Annotated and local rules, regulations, policies, and procedures relating to noncharter public schools within the located school district.

 Helena School District Montessori Charter School
is in compliance with the requirements outlined in the Charter Contract.

CHARTER SCHOOL CHANGES:

As outlined in 7.1.4 of the Charter Contract, public charter schools must annually submit to the Board of Public Education a statement outlining changes to the school's educational program, mission, and governing and organizational structures during the previous year. Please also include any substantive changes expected for the upcoming school year.

Changes to Educational Program:

NONE

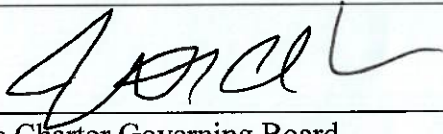
Changes to Public Charter School Mission and Vision:

NONE

Changes to Governing and Organizational Structures:

NONE

Signature



Chair of the Charter Governing Board

5/12/2024

Date

Please submit the Annual Performance Report to bpe@mt.gov



Montana Board of Public Education

Project for Alternative Learning Charter School

2026 Annual Performance Report

INTRODUCTION

As outlined in [20-6-809, MCA](#), the Board of Public Education must annually publish a performance report for each public charter school under its purview aligned with the Public Charter School Performance Framework. The report summarizes the school's academic performance, financial reporting, and organizational performance utilizing the most recent data available for the year in review. The Annual Performance Report also provides a summary of the mission of the charter school and enrollment demographics.

The Board of Public Education is committed to serving and strengthening Montana's system of free quality public elementary and secondary schools, including public charter schools. This Annual Performance Report is produced in order to:

1. Provide timely information to the charter school on its performance relative to the standards and expectations established by applicable federal and state law and the charter contract.
2. Identify the school's strengths and any areas needing improvement.
3. Provide information that enables the community and the public to understand the school's performance.

SCHOOL OVERVIEW

School Name	Project for Alternative Learning Charter School
School Location	Helena, MT
Grades Served	10-12
School Mission	Provide a transformative and personalized education experience that empowers students to thrive academically, socially, and personally. We are committed to fostering a supportive and inclusive learning community which promotes each student reaching their academic potential, having mastered the skills and knowledge to support future aspirations to become responsible global citizens.
School and Mission Specific Goals	Helena Project for Alternative Learning (PAL) has established goals focused on student graduation and postsecondary readiness. Goal 1: Student Graduation PAL aims for at least 24 new students to successfully complete the program and graduate by the end of the school year, including demonstrating their learning and progress through a final presentation to a parent or adult. Goal 2: Postsecondary Readiness PAL aims for at least 90% of graduating students to demonstrate postsecondary readiness by achieving one or more of the following: completion of dual enrollment coursework, current employment, a planned internship, or enrollment in a postsecondary program.
High School Enrollment	85
Total Enrollment in 2026	85

2026 PERFORMANCE FRAMEWORK OVERVIEW

For each measure in this report, the school receives one of the ratings described below:

RATING	DESCRIPTION
Exceeds Standard	This rating is reserved for performance that far exceeds expectations, demonstrating exceptional performance on a particular measure. This rating may be used in the academic framework, but it is not typically used in the financial or organizational framework.
Meets Standard	The target for this rating category sets the expectation for charter school performance in all measures in all frameworks—academic, financial, and organizational. Schools earning this rating on a particular measure are performing well in that area.
Approaches Standard	Schools with this rating are approaching but have not fully met expectations for performance on a given measure. While these schools have achieved some of the minimum expectations on the measure in question, these schools may be subject to further analysis and potentially closer monitoring. This rating may be used for academic measures and qualitative measures in the organizational and financial frameworks.
Does Not Meet Standard	Schools with this rating on a measure are performing below the authorizer's expectations, and the school is subject to further analysis, closer monitoring, and possibly intervention. This rating is used on all measures in all frameworks.

This section provides an overview of the school's performance across the reporting years reviewed on a variety of academic, financial, and organizational measures the school is accountable for achieving, as established by applicable federal and state law and the charter contract.

Academic Performance	2024-2025	2025-2026
Mission or School-Specific Goal(s)	Meets Standard	Meets Standard
Overall Math Proficiency and Growth	Elementary and Middle School only	Approaches Standard
Overall ELA Proficiency and Growth	Elementary and Middle School only	Approaches Standard
Subgroup Math Proficiency and Growth	Elementary and Middle School only	Meets Standard
Subgroup ELA Proficiency and Growth	Elementary and Middle School only	Meets Standard
Attendance	Applicable next year	Does Not Meet Standard
Student Engagement	Meets Standard	Exceeds Standard
Support for Transitions	Elementary and Middle School only	Elementary and Middle School only
Post-Secondary Readiness	Meets Standard	Approaches Standard
Financial Performance		
Financial Performance and Stability	Meets Standard	Meets Standard
Recurrent Enrollment	Applicable next year	Does Not Meet Standard
Organizational Performance		
Charter Governing Board Performance and Stewardship	Meets Standard	Meets Standard

*Adapted from the NACSA Annual Report Toolkit and Guidance

PERFORMANCE MONITORING SUMMARY

If given a rating of "Approaches Standard" or "Does Not Meet Standard" on any Public Charter School Performance Framework measures, please briefly provide any context and plans to address these concerns.

The Project for Alternative Learning Charter was ranked as Approaches Standard in the areas of Math and ELA Proficiency and Growth. The mission and vision of this Charter is to be an inclusive space where marginalized populations and those who previously have been unsuccessful in traditional schools begin to connect positively to learning and to develop a path to life after high school and be connected to a career opportunity. Even though the school meets the goal of connecting students to a positive future post high school, these students often struggle with traditional academics. The Charter will work to improve on this ranking.

The Project for Alternative Learning Charter was ranked as Approaches Standard for Post-Secondary Readiness. The Charter will need to clarify with the ranking committee what it expects to see as evidence to meet the standards of this category and will work to improve this ranking.

The Project for Alternative Learning Charter was ranked as Does Not Meet Standards for Attendance. The Charter is working to clarify this ranking with the OPI. The Charter thinks this ranking results from challenges loading the instructional program and attendance into the OPI software. The Charter will work to improve on this ranking.

The Project for Alternative Learning Charter was ranked as Does Not Meet Standards for Recurrent Enrollment. The enrollment with PAL is stable. It will not be able to grow without expanding the facility and the staffing. The facility will be improved for the fall of 2028, as voted by the Helena Community. The Charter will work to improve on this ranking.

SUMMARY OF OPEN-ENDED QUESTIONS

As part of the Public Charter School Performance Framework, schools were asked to report on five open-ended questions to provide the Board of Public Education with additional context.

How has the public charter school prioritized innovation different from a program that the school district could operate or currently operates without the public charter designation?

PAL wouldn't exist on the regular public-school dollar. It also wouldn't be able to expand to meet the needs of the community if it weren't a charter school. It is very innovative in that it's a very small school, very intentionally relational in its structure, organization and pacing of student learning. Students choose and apply for this charter school.

Why is the public charter school innovating? What are the student needs in the community that are trying to be met?

The students need peer connection and a close knit school community for success. They want to be in a smaller, more relational place rather than the large high school concept. PAL is innovative to serve the needs of at-risk students to build the foundation for them to graduate and connect them to a career.

How is the public charter school flexible and nimble in response to the needs of students?

PAL Charter allows students to pick their next course in a 3-week fashion. The PAL model is highly focused on creating a positive school community. It utilizes small groups and frequent check-ins with students to ensure they are growing in learning and connected in the school setting. The small group check ins and daily adjustments to school and rotation of courses makes PAL flexible, nimble and supportive for students.

What roadblocks or challenges is the public charter school encountering in efforts to innovate in the public charter school?

The 3 week course schedule and the OPI course structure input struggle to coexist. The data share and upload is counter intuitive to serving students in this flexible/nimble and personalized model.

The structural concept of PAL is to have a flexible master schedule of courses in 3 week time frames so students can choose their next course. The state expects all these courses to be uploaded in advance through the 3 times per year with teacher class. Uploading in advance stifles student opportunity. They pick their course when the time comes, not like traditional schools.

This data dilemma is causing the rankings of this school to be lesser than it deserves.

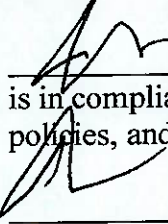
Enrollment expansion is limited by facilities, staffing, and funding. The student to staff ratio is low in a school like this. Growing enrollment doesn't work for the culture of the school. Growth is capped by facilities, staffing and funding. This model proves great success but is expensive.

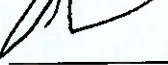
What have you learned, and what goals do you want to set moving forward?

This is a great school for students to be able to connect to career and gain academic success. Though their test scores are not as strong as the stronger comprehensive high school programs. Their school experience is heightened to a new level which in turn causes them to have a positive approach to their next steps in life.

STATEMENT OF ASSURANCES:

As outlined in 7.1.3 and 7.1.4 of the Charter Contract, the Charter Governing Board must annually submit to the Board of Public Education a statement of assurances relating to compliance with the Charter Contract and applicable law. The chair of the Charter Governing Board shall initial the following statements of assurance that the public charter school is in compliance with requirements outlined in the Charter Contract and applicable statute:

 Helena School Districts' Project for Alternative Learning Charter School is in compliance with the provisions in Title 20 of Montana Code Annotated and local rules, regulations, policies, and procedures relating to noncharter public schools within the located school district.

 Helena School Districts' Project for Alternative Learning Charter School is in compliance with the requirements outlined in the Charter Contract.

CHARTER SCHOOL CHANGES:

As outlined in 7.1.4 of the Charter Contract, public charter schools must annually submit to the Board of Public Education a statement outlining changes to the school's educational program, mission, and governing and organizational structures during the previous year. Please also include any substantive changes expected for the upcoming school year.

Changes to Educational Program:

The school will continue to add 9 graders as it began in 2025-2026. Goal 1, separately, needs some adjusting. It needs to be a percentage of those that begin school vs. a concrete number. The concrete number would depend on how many students are in a certain grade level. The original intention of the original Goal 1 was to describe the effectiveness of the school module of orientation. This was the original Goal 1 of our contract: "At least 24 new students will succeed in graduating through the orientation phase of learning at PAL and presenting to their adult/or parent their success by the end of the school year." We need to write a better more reflective goal.

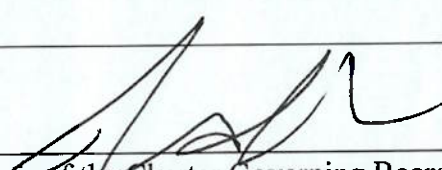
Changes to Public Charter School Mission and Vision:

NONE

Changes to Governing and Organizational Structures:

NONE

Signature


Chair of the Charter Governing Board


Date

Please submit the Annual Performance Report to bpe@mt.gov



Montana Board of Public Education

Mount Ascension Learning Academy 2026 Annual Performance Report

INTRODUCTION

As outlined in [20-6-809, MCA](#), the Board of Public Education must annually publish a performance report for each public charter school under its purview aligned with the Public Charter School Performance Framework. The report summarizes the school's academic performance, financial reporting, and organizational performance utilizing the most recent data available for the year in review. The Annual Performance Report also provides a summary of the mission of the charter school and enrollment demographics.

The Board of Public Education is committed to serving and strengthening Montana's system of free quality public elementary and secondary schools, including public charter schools. This Annual Performance Report is produced in order to:

1. Provide timely information to the charter school on its performance relative to the standards and expectations established by applicable federal and state law and the charter contract.
2. Identify the school's strengths and any areas needing improvement.
3. Provide information that enables the community and the public to understand the school's performance.

SCHOOL OVERVIEW

School Name	Mount Ascension Learning Academy
School Location	Helena, MT
Grades Served	1-12
School Mission	Provide a transformative and personalized education experience that empowers students to thrive academically, socially, and personally. We are committed to fostering a supportive and inclusive learning community which promotes each student reaching their academic potential by mastering the skills and knowledge to support future aspirations to become responsible global citizens.
School and Mission Specific Goals	Mount Ascension Learning Academy has established goals focused on personalized learning and accelerated credit attainment. Goal 1: Personalized Learning Plans Mount Ascension aims for at least 85% of students to participate in the development of a personalized learning plan by the end of the school year. Goal 2: Accelerated Credit Attainment Mount Ascension aims for at least 20 students to earn credits at an accelerated rate compared to their prior academic progress by the end of the school year.
Elementary School Enrollment	48
Middle School Enrollment	40
High School Enrollment	103
Total Enrollment in 2026	191

2026 PERFORMANCE FRAMEWORK OVERVIEW

For each measure in this report, the school receives one of the ratings described below:

RATING	DESCRIPTION
Exceeds Standard	This rating is reserved for performance that far exceeds expectations, demonstrating exceptional performance on a particular measure. This rating may be used in the academic framework, but it is not typically used in the financial or organizational framework.
Meets Standard	The target for this rating category sets the expectation for charter school performance in all measures in all frameworks—academic, financial, and organizational. Schools earning this rating on a particular measure are performing well in that area.
Approaches Standard	Schools with this rating are approaching but have not fully met expectations for performance on a given measure. While these schools have achieved some of the minimum expectations on the measure in question, these schools may be subject to further analysis and potentially closer monitoring. This rating may be used for academic measures and qualitative measures in the organizational and financial frameworks.
Does Not Meet Standard	Schools with this rating on a measure are performing below the authorizer's expectations, and the school is subject to further analysis, closer monitoring, and possibly intervention. This rating is used on all measures in all frameworks.

This section provides an overview of the school's performance across the reporting years reviewed on a variety of academic, financial, and organizational measures the school is accountable for achieving, as established by applicable federal and state law and the charter contract.

Academic Performance: Elementary School	2024-2025	2025-2026
Mission or School-Specific Goal(s)	Meets Standard	Does Not Meet Standard
Overall Math Proficiency and Growth	Approaches Standard	Approaches Standard
Overall ELA Proficiency and Growth	Approaches Standard	Approaches Standard
Subgroup Math Proficiency and Growth	Approaches Standard	Meets Standard
Subgroup ELA Proficiency and Growth	Approaches Standard	Meets Standard
Attendance	Applicable next year	Approaches Standard
Student Engagement	Meets Standard	Meets Standard
Support for Transitions	Meets Standard	Meets Standard
Post-Secondary Readiness	High School only	High School only
Financial Performance		
Financial Performance and Stability	Meets Standard	Meets Standard
Recurrent Enrollment	Applicable next year	Does Not Meet Standard
Organizational Performance		
Charter Governing Board Performance and Stewardship	Meets Standard	Meets Standard

*Adapted from the NACSA Annual Report Toolkit and Guidance

PERFORMANCE MONITORING SUMMARY

If given a rating of "Approaches Standard" or "Does Not Meet Standard" on any Public Charter School Performance Framework measures, please briefly provide any context and plans to address these concerns.

The Mount Ascension Learning Academy Elementary Charter School was ranked as Approaches Standard or Does Not Meet Standard in the following areas:

Mission or School Specific Goals-ranked Does Not Meet Standard. It is difficult to discern why we received this ranking from the committee. Our plan is to communicate with the ranking committee to hear feedback and to resolve and adjust in attempt to improve the ranking. The Charter will work to improve on this ranking.

Overall Math Proficiency and Growth-ranked Approaches Standard. Students in this school enroll 1 day per week. Math proficiency is difficult to achieve with learning one day per week. Combined with facility, physical space and instructor availability, expansion is not on the horizon. Students and families are also averse to the state instructional testing requirements. The Charter will work to improve on this ranking, by integrating more Math into Science.

Overall ELA Proficiency and Growth-ranked Approaches Standard. Students in this school enroll 1 day per week. Math proficiency is difficult to achieve with learning one day per week. Combined with facility, physical space and instructor availability, expansion is not on the horizon. Students and families are also averse to the state instructional testing requirements. The Charter will work to improve on this ranking, by integrating more ELA into Science.

Attendance-ranked Approaches Standard. The Charter will work to improve this ranking, by communicating the importance of attendance.

Recurrent Enrollment-ranked Does Not meet Standard. The Charter will work to improve this ranking. But this will be difficult because of dilemmas with facilities which stifle growth at this location. Parents also prefer this physical location for instruction to occur.

Academic Performance: Middle School	2024-2025	2025-2026
Mission or School-Specific Goal(s)	Meets Standard	Approaches Standard
Overall Math Proficiency and Growth	Approaches Standard	Approaches Standard
Overall ELA Proficiency and Growth	Approaches Standard	Meets Standard
Subgroup Math Proficiency and Growth	Approaches Standard	Meets Standard
Subgroup ELA Proficiency and Growth	Approaches Standard	Approaches Standard
Attendance	Applicable next year	Exceeds Standard
Student Engagement	Meets Standard	Exceeds Standard
Support for Transitions	Meets Standard	Meets Standard
Post-Secondary Readiness	High School only	High School only
Financial Performance		
Financial Performance and Stability	Meets Standard	Meets Standard
Recurrent Enrollment	Applicable next year	Meets Standard
Organizational Performance		
Charter Governing Board Performance and Stewardship	Meets Standard	Meets Standard

*Adapted from the NACSA Annual Report Toolkit and Guidance

PERFORMANCE MONITORING SUMMARY

If given a rating of "Approaches Standard" or "Does Not Meet Standard" on any Public Charter School Performance Framework measures, please briefly provide any context and plans to address these concerns.

The Mount Ascension Learning Academy Middle Charter School was ranked as Approaches Standard in the following areas:

Mission or School Specific Goals-ranked Approaches Standard. The Charter will work to improve this ranking, by submitting more pieces of evidence.

Overall Math Proficiency and Growth-ranked Approaches Standard. Students in this school enroll 1 day per week. Math proficiency is difficult to achieve with learning one day per week. Combined with facility, physical space and instructor availability, expansion is not on the horizon. Students and families are also

averse to the state instructional testing requirements. Students also have the option of taking courses online, but this has been a limited choice made by parents. The Charter will work to improve on this ranking, by integrating more Math into Science.

Subgroup ELA Proficiency and Growth-ranked Approaches Standard. Students in this school enroll 1 day per week. Math proficiency is difficult to achieve with learning one day per week. Combined with facility, physical space and instructor availability, expansion is not on the horizon. Students and families are also averse to the state instructional testing requirements. The Charter will work to improve on this ranking, by integrating more ELA into Science.

Academic Performance: High School	2024-2025	2025-2026
Mission or School-Specific Goal(s)	Meets Standard	Meets Standard
Overall Math Proficiency and Growth	Elementary and Middle School only	Approaches Standard
Overall ELA Proficiency and Growth	Elementary and Middle School only	Approaches Standard
Subgroup Math Proficiency and Growth	Elementary and Middle School only	Meets Standard
Subgroup ELA Proficiency and Growth	Elementary and Middle School only	Meets Standard
Attendance	Applicable next year	Exceeds Standard
Student Engagement	Meets Standard	Exceeds Standard
Support for Transitions	Elementary and Middle School only	Elementary and Middle School only
Post-Secondary Readiness	Meets Standard	Approaches Standard
Financial Performance		
Financial Performance and Stability	Meets Standard	Meets Standard
Recurrent Enrollment	Applicable next year	Does Not Meet Standard
Organizational Performance		
Charter Governing Board Performance and Stewardship	Meets Standard	Meets Standard

*Adapted from the NACSA Annual Report Toolkit and Guidance

PERFORMANCE MONITORING SUMMARY

If given a rating of “Approaches Standard” or “Does Not Meet Standard” on any Public Charter School Performance Framework measures, please briefly provide any context and plans to address these concerns.

The Mount Ascension Learning Academy High School Charter was ranked as Approaches Standard or Does Not Meet Standard in the following areas:

Overall Math Proficiency and Growth-ranked Approaches Standard. The Charter will work to improve this ranking by submitting more pieces of evidence.

Overall ELA Proficiency and Growth-ranked Approaches Standard. The Charter will work to improve this ranking by submitting more pieces of evidence.

Post-Secondary Readiness-ranked Approaches Standard. The Charter will work to improve this ranking by submitting more pieces of evidence.

Recurrent Enrollment-ranked Does Not meet Standard. The Charter will work to improve this ranking. This factor is controlled by the desire of students to enroll in the Charter. The effort of the Charter will be to more broadly communicate the opportunities for students.

SUMMARY OF OPEN-ENDED QUESTIONS

As part of the Public Charter School Performance Framework, schools were asked to report on five open-ended questions to provide the Board of Public Education with additional context.

How has the public charter school prioritized innovation different from a program that the school district could operate or currently operates without the public charter designation?

Mount Ascension encourages students and families to chart their own path of courses and the timeline for taking the courses, through a personalized learning plan. Without the Charter basic entitlement, this school would not exist for the public. The costs for the curriculum, technology, certified staff.

Why is the public charter school innovating? What are the student needs in the community that are trying to be met?

Many students need both the classic school experience and this personalized one. It is innovative to be able to offer both options. Their need is exemplified by the enrollment in the charter.

How is the public charter school flexible and nimble in response to the needs of students?

Flexible and nimble is the foundation of Mount Ascension through the personalized learning plan of each individual student. Students and Parents can adjust their plans as needed with the assistance of school staff. Timelines, courses, pacing, all flexible with options for in-person, remote, and hybrid.

What roadblocks or challenges is the public charter school encountering in efforts to innovate in the public charter school?

Roadblocks or Challenges:

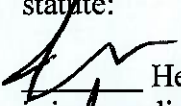
State assessment tools and the data reporting requirements are a substantial challenge especially when parents and students don't share the same philosophy regarding importance of these systems. Then the expected data share, time spent, traditional data collection method, all force the instruction to be more standardized than innovative. We also struggle with facility space. Often students accessing the charter want services and spaces separate and different from a traditional school building. The physical space limitations and locations prevent further expansion and stifle participation.

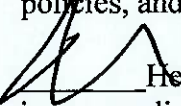
What have you learned, and what goals do you want to set moving forward?

The cost / value analysis of the grades 1 to 8 program is not proving to be fiscally responsible. With not attaining a basic entitlement combined with smaller and partial enrollments, the grades 1 to 8 portion of this charter are not fiscally viable. We have learned the high school version is very engaging and desired by students. We will be able to continue to expand to the needs of the learner. The high school experience provides the students the agency they desire in learning modalities and courses and settings. The high school credit attainment goal needs to be adjusted. It is not a goal that can be measured accurately. We are finding out that students chose to participate in the high school for a variety of reasons, primarily their need is to customize their educational opportunity through the personalized learning plan, which is the first goal.

STATEMENT OF ASSURANCES:

As outlined in 7.1.3 and 7.1.4 of the Charter Contract, the Charter Governing Board must annually submit to the Board of Public Education a statement of assurances relating to compliance with the Charter Contract and applicable law. The chair of the Charter Governing Board shall initial the following statements of assurance that the public charter school is in compliance with requirements outlined in the Charter Contract and applicable statute:

 Helena School District's Mount Ascension Learning Academy Charter School is in compliance with the provisions in Title 20 of Montana Code Annotated and local rules, regulations, policies, and procedures relating to noncharter public schools within the located school district.

 Helena School District's Mount Ascension Learning Academy Charter School is in compliance with the requirements outlined in the Charter Contract.

CHARTER SCHOOL CHANGES:

As outlined in 7.1.4 of the Charter Contract, public charter schools must annually submit to the Board of Public Education a statement outlining changes to the school's educational program, mission, and governing and organizational structures during the previous year. Please also include any substantive changes expected for the upcoming school year.

Changes to Educational Program:

This charter is in the planning process to not offer services to grades 1 to 8 starting in the Fall of 2026. Instruction will still be offered by the local school district to grades 1 to 8, but likely not through the charter. Mount Ascension Learning Academy High School will continue with the grades 9-12. We will make an adjustment to Goal 2, this adjustment aligns better to the mission and vision of the school.

Goal 2: Postsecondary Readiness

Mount Ascension High School aims for at least 90% of graduating students to complete a post-graduation action plan which describes their connection to workforce, career, or post-secondary study.

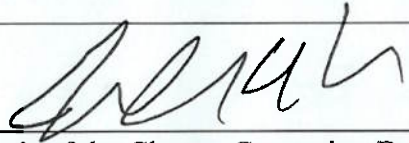
Changes to Public Charter School Mission and Vision:

NONE

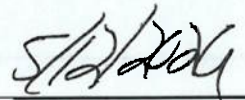
Changes to Governing and Organizational Structures:

NONE (see above if organizational structure and grade level is associated)

Signature



Chair of the Charter Governing Board



Date

Please submit the Annual Performance Report to bpe@mt.gov

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.C.1.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☒ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: **Item for Information**
 1. Mentorship Update

HELENA SCHOOL DISTRICT

Board of Trustees Meeting

Item IV.C.2.

Meeting Date:	7/15/2026
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Call To Order/Pledge of Allegiance/Introductions

Review of Agenda

General Public Comment

Consent Action Items

Items for Action

X

Items for Information

Board/Superintendent Comments

Adjournment

Item Title:

Item for Information

2. CAMPS School Funding Proposal

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.C.3.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☒ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: **Item for Information**
 3. Board Advocacy

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.C.4.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☒ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: **Item for Information**
4. Board Training with Legal Counsel

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.C.5.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☒ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: **Item for Information**
5. Educational Data and Curricular Training



EDUCATIONAL DATA THAT DRIVES BETTER DECISIONS

Context. Perspective. Progress.

Using data wisely to support every student, every day.

1 HOW DOES MONTANA COMPARE?

Montana students perform above the national average on the Nation's Report Card (NAEP).

2024 NAEP AVERAGE SCALE SCORES

(Higher scores indicate stronger performance)

SUBJECT & GRADE	MONTANA AVERAGE SCORE	U.S. PUBLIC SCHOOLS AVERAGE SCORE	MONTANA vs. U.S. AVERAGE
4 TH GRADE READING	218	214	↑ Above
4 TH GRADE MATH	223	215	↑ Above
8 TH GRADE READING	262	258	↑ Above
8 TH GRADE MATH	271	265	↑ Above



Montana scores above the national average in both reading and math at grades 4 and 8.



Ahead of most neighboring western states on NAEP.



Graduation rates remain relatively stable around 86%.



Like nearly every state, Montana experienced learning declines following COVID.

HOW MONTANA COMPARES TO OTHER STATES (2024 NAEP)

4TH GRADE READING (Scale Score)

1. Massachusetts	239
2. New Hampshire	231
3. Vermont	230
...	

11. Montana	218
U.S. Public Schools	214

*International benchmarking partner

4TH GRADE MATH (Scale Score)

1. Massachusetts	240
2. Singapore*	237
3. New Jersey	234
...	

12. Montana	223
U.S. Public Schools	215

2 HELENA PUBLIC SCHOOLS SNAPSHOT

Helena students perform above the state average in key areas.

STATE ACT RESULTS (Class of 2024) Helena High Schools (All) vs. Montana Average

ACT COMPOSITE AND SUBJECT AVERAGES	HELENA PUBLIC SCHOOLS	MONTANA AVERAGE
ACT COMPOSITE	21.3	19.5
ENGLISH	21.1	18.6
MATH	20.9	19.0
READING	22.1	20.4
SCIENCE	20.5	19.3

Source: ACT College Readiness Benchmarks – Class of 2024

COLLEGE & CAREER READINESS

- ✓ Helena juniors have consistently exceeded the Montana average on all four ACT College Readiness Benchmarks (English, Reading, Math, and Science) over the past five years.
- ✓ Helena graduates require remedial coursework at one of the lowest rates in the state when entering the Montana University System.



3 HOW TO INTERPRET STUDENT DATA

WHAT SHOULD WE EXPECT TO SEE?



Gradual improvement over time



Increasing student growth



More students moving from Basic to Proficient



Achievement gaps narrowing



Interventions working



Strong graduation & postsecondary outcomes

WHY 60% PROFICIENCY CAN REPRESENT STRONG PERFORMANCE



- Proficiency means a student has demonstrated the knowledge and skills expected at or above grade level.
- Students scoring **BASIC** have many grade-level skills but have not yet demonstrated consistent mastery across the full range of standards.
- A student just below the proficiency cut score is not failing—they may be only a few points away from meeting the standard.
- Because of differences in starting points, learning needs, mobility, and assessment rigor, even the highest-performing states do not reach 100% proficiency.
- In many states, proficiency rates around 60% are above the state average and indicate strong performance.

MYTH

- ✗ 60% proficient means 40% failed.
- ✗ One year's scores tell us everything.
- ✗ Every district should reach 100% proficiency.
- ✗ Test scores alone define school quality.

REALITY

- ✓ Many students below proficiency are close to the benchmark and continue to make academic growth.
- ✓ Trends over three to five years provide a much more reliable picture of district performance.
- ✓ No state or district reaches 100% because proficiency represents a rigorous standard and student populations are diverse.
- ✓ School quality also includes growth, graduation, college readiness, attendance, career readiness, school climate, and student engagement.

4 WHAT IS STUDENT ACHIEVEMENT DATA TELLING US?

ACHIEVEMENT LEVELS EXPLAINED



ADVANCED

Students exceed grade-level standards.



PROFICIENT

Students meet grade-level standards.



BASIC

Students demonstrate some grade-level skills but are not yet consistently proficient.



BELOW BASIC

Students demonstrate limited grade-level skills.

WHAT SHOULD WE EXPECT?



Students start the year at different academic levels.



Students receiving special education services have individualized learning goals.



English learners are developing language and academic skills simultaneously.



Students move into and out of districts throughout the year.



State assessments set a rigorous benchmark representing full grade-level mastery—not just passing.

A BETTER QUESTION FOR BOARDS

Instead of asking...



"Why aren't all students proficient?"

Ask instead...

- ✓ Are more students reaching proficiency than last year?
- ✓ Are students making expected growth?
- ✓ Are achievement gaps narrowing?
- ✓ Are interventions helping students move from Basic to Proficient?

5 THE BIG PICTURE



Educational data should inform decisions—not define schools.

Strong governance examines multiple measures, long-term trends, and student growth to understand the full story and improve outcomes for EVERY student.

THINK LONG TERM



One-Year Data Snapshot



Five-Year Data Trend



Weather



Climate



Single Test



Student Journey



Question



Evidence



GOOD DECISIONS. STRONG SCHOOLS. BRIGHTER FUTURES.

When we use data with context and perspective, we can create strong schools and strong communities.

SOURCES

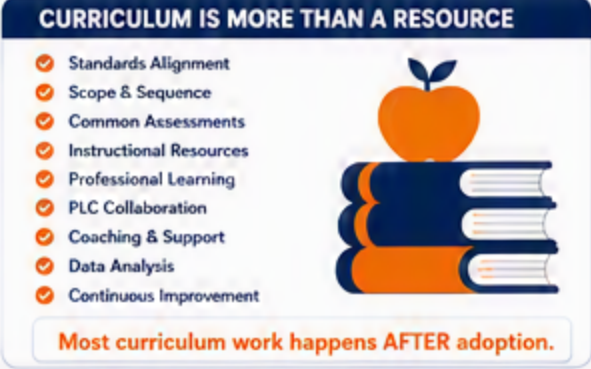
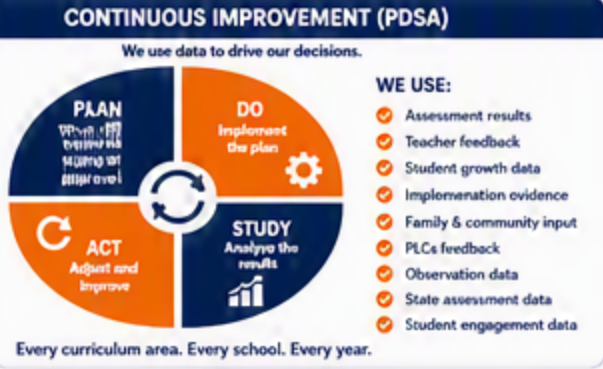
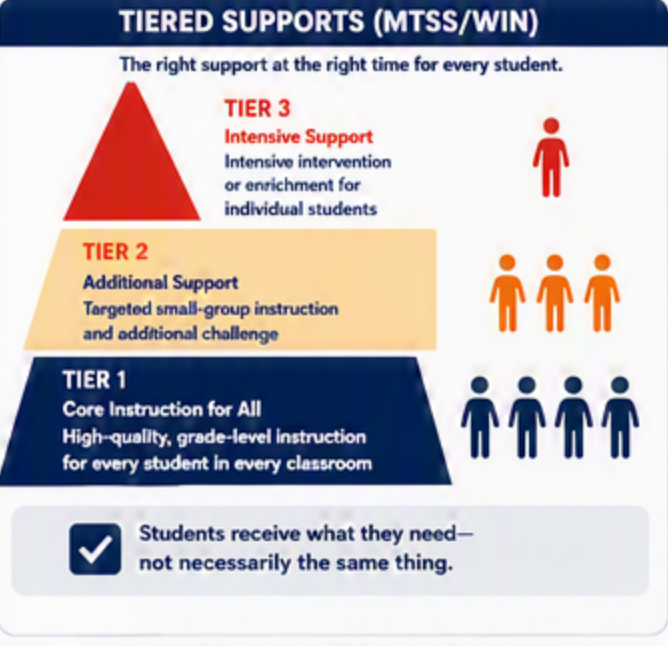
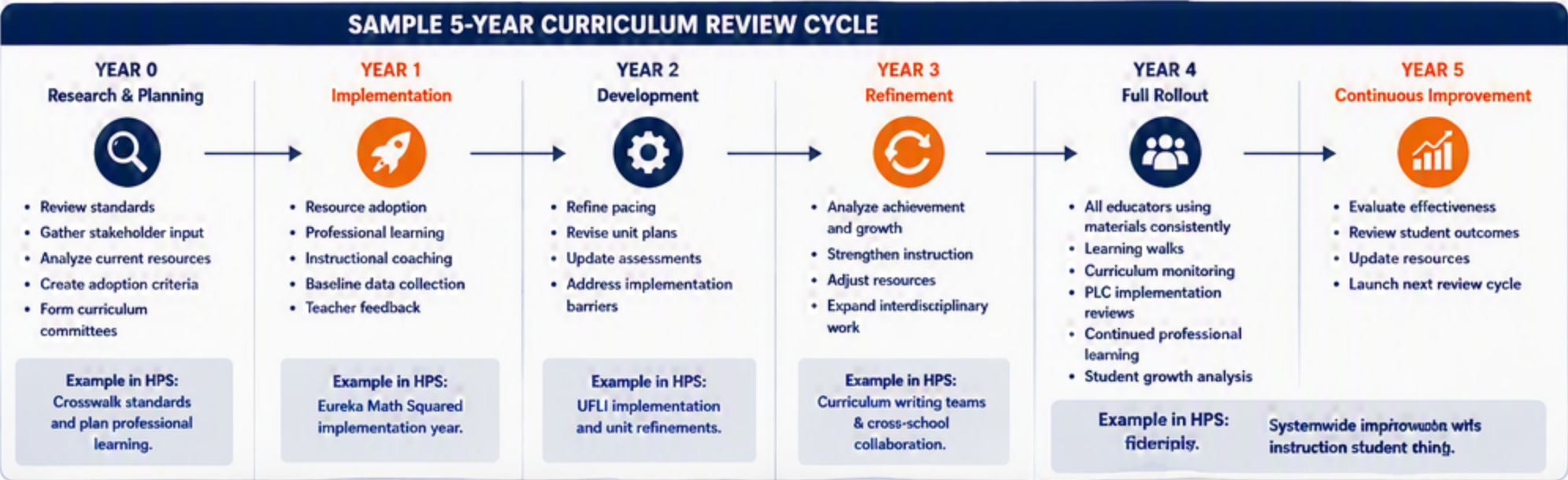
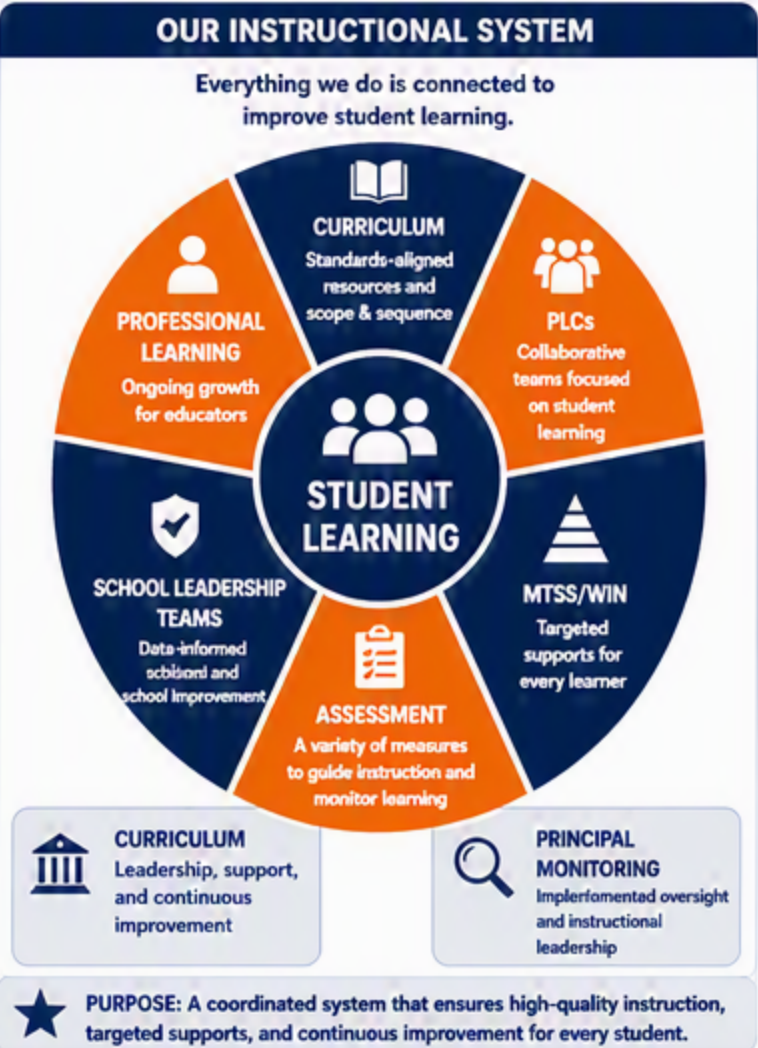
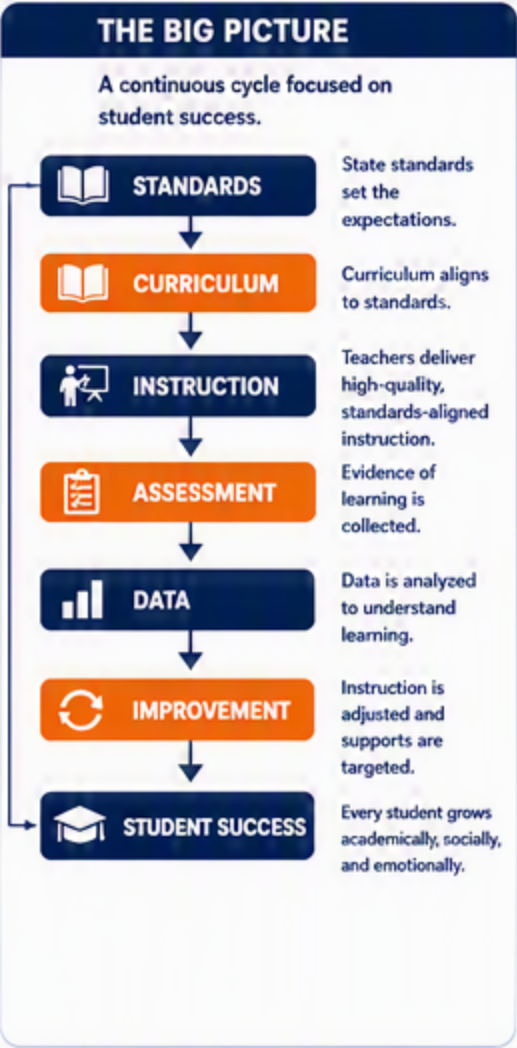
- National Center for Education Statistics (NCES) – 2024 NAEP (nationsreportcard.gov)
- Montana Office of Public Instruction (OPI) – 2024 Montana State Assessment Results; Graduation Rates (opi.mt.gov)
- Helena Public Schools – District Data and Reports (helenaschools.org)
- ACT, Inc. – ACT College Readiness Benchmarks (act.org)



BETTER TOGETHER.
STRONG SCHOOLS,
STRONG COMMUNITIES.

HOW HELENA PUBLIC SCHOOLS IMPROVES STUDENT LEARNING

A System of Curriculum, Instruction, Assessment, and Continuous Improvement



HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.C.6.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☒ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: **Item for Information**
6. Performance Indicators and Data Dashboard Implementation

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.C.7.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☒ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: **Item for Information**
 7. Trustee Engagement and Operations

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item IV.C.8.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☒ Items for Information

☐ Board/Superintendent Comments

☐ Adjournment

Item Title: **Item for Information**
8. Wrap Up and Next Steps

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item V.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☐ Items for Information

☒ Board/Superintendent Comments

☐ Adjournment

Item Title: **Board/Superintendent Comments**

HELENA SCHOOL DISTRICT
Board of Trustees Meeting

Meeting Date: 7/15/2026

Item VI.

☐ Call To Order/Pledge of Allegiance/Introductions

☐ Review of Agenda

☐ General Public Comment

☐ Consent Action Items

☐ Items for Action

☐ Items for Information

☐ Board/Superintendent Comments

☒ Adjournment

Item Title: **Adjournment**