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OFFICE OF PUBLIC INSTRUCTION  
STATE OF MONTANA



Putting Montana Students First **A<sup>+</sup>**

# Montana Office of Public Instruction

## INVITATION TO APPLY

### TRANSFORMATIONAL LEARNING GRANT OPPORTUNITY

#### ISSUED BY

Montana Office of Public Instruction  
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**Application Period: October 1–November 1, 2019**

**Application Deadline: 5:00 p.m. November 1, 2019**

Questions regarding this application should be directed to:

Montana Office of Public Instruction  
1227 11th Avenue, 2<sup>nd</sup> Floor  
Box 202501  
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Jule Walker, Deputy Superintendent of Operations

[jule.walker@mt.gov](mailto:jule.walker@mt.gov)

406-444-7325

Sharyl Allen, Transformational and Personalized Learning Manager

[sharyl.allen@mt.gov](mailto:sharyl.allen@mt.gov)

## OVERVIEW

House Bill 351, sponsored by Representative Wendy McKamey, was signed into law on May 9, 2019. HB 351 amends section [20-9-116, MCA](#), and revises education laws to support transformational learning.

Transformational learning is defined as a flexible system of pupil-centered learning that is designed to develop the full educational potential of each person.

### Transformational Learning provides:

- A system that is customized to address each pupil's strengths, needs and interests.
- A system that includes continued focus on each pupil's proficiency over content.
- A system that actively engages each pupil in determining what, how, when and where each pupil learns.

### Specific requirements for the district of the application:

- Identify the number of full-time equivalent educators that are meeting the criteria of [20-9-327 \(3\), MCA](#) who will participate in the district's transformational learning program.
- Include the district's definition of proficiency within the meaning of that term as used in [20-9-311 \(4\) \(d\), MCA](#). Seat time cannot be required as a condition or other element of determining proficiency. The definitions must be incorporated into the district's policies and must be used for the purposes of determining content and course mastery and any other progress for pupils enrolled in the district's transformational program.
- Include a strategic plan, with appropriate planning horizons for implementation - such as the eligibility plan, measurable objectives to ensure accountability, and planned strategies to:
  - Develop a transformational learning plan for each participating pupil.
  - Embed community-based, experiential, online and work-based learning opportunities that incorporate virtual and face-to-face connections.
  - Provide effective professional development to assist employees in transitioning to a transformational learning model.
  - Ensure equality of educational opportunity to participate by all pupils of the district.
- The local school district's application must be formally approved by the district's board of trustees and signed by the district board chair.

### Key Dates:

- Opening and closing dates for the Fiscal Year 2020 application: October 1 – November 1, 2019
- Deadline for submission of your annual report for the Board of Public Education: TBA
- The application is available on the OPI website. (This page also has a submit button where all applications will be digitally submitted to the OPI.).

Note: All applications received by the OPI will be submitted to the Board of Public Education for qualification.

## FUNDING

**Funding is provided on a “first come – first served” basis per HB 351 Section 2(3)(b).**

Districts are potentially eligible for four consecutive years of funding. The OPI will provide the state payment to qualified districts.

For fiscal year 2020 the transformation learning payment to be made to school districts will be calculated as 50 percent of the total quality educator payment defined in [20-9-306, MCA](#), multiplied by the number of each qualifying district’s full-time equivalent educators reported who will participate in the district’s transformational learning program. The FY 2020 payment will be distributed no later than June 30. In the years following FY 2020, payments are to be made no later than October 1. Districts are to deposit these state payments into the school district flexibility fund.

HB 351 Section 2(4)(c) allows no school district to receive more than 25% of the total amount of transformational learning aid payments made in FY 2020 and FY 2021. The limit per school district does not continue beyond the biennium.

State law requires the Superintendent to calculate “Transformational Learning Aid” as 50% of the quality of education payment multiplied by

- For FY 2020 5% of the statewide number of FTE from FY 2019
  - For FY 2021 7.5% of the statewide number of FTE from FY 2020
  - For FY 2022 and subsequent FYs 10% of the statewide number of FTEs from FY 2021 & prior FYs
- See HB 351, Section 2(8)(b)

The following table is an estimate of this calculation. The 2019 Montana legislation has appropriated \$2.6 million for the 2021 biennium.

FISCAL YEAR	½ QEC	STATEWIDE FTE	% OF FTE	TOTAL FUNDS AVAILABLE
2020	\$1,637.50	12,619	5.0%	\$1,033,151
2021	\$1,667.50	12,619	7.5%	\$1,578,118
2022	\$1,689.00	12,619	10.0%	\$2,131,287
2023	\$1,716.00	12,619	10.0%	\$2,165,420

### Permissive Levies

HB 351 allows, if the obligations of transparency set forth in [20-9-116, MCA](#) are met, levy an annual permissive property tax not to exceed 100% of any funds distributed to the district under subsection (4) of HB 351. . Proceeds of the levy must be deposited in the district's flexibility fund established under [20-9-543, MCA](#) and must be expended by the district only for the purposes of the district's approved transformational learning plan.

Remember, if you are intending to permissively levy for transformational learning, you must be qualified for the funding. The notice to levy increases were due by March 31 in compliance with [20-9-116, MCA](#).

## FUNDING continued:

HB 351 Section 2(5)(b) provides that a school district's trustees may approve transfers of state or local revenue from any budgeted or nonbudgeted fund, other than the debt service fund or retirement fund, to the district's flexibility fund provided by [20-9-543, MCA](#) as long as your school district remains qualified for a transformational learning aid payment.

To take advantage of added budget flexibilities, districts would need to know the amount of state payment received, to prepare an adopted district budget with proper budget authority. In FY 2020 the district may need to submit a budget amendment.

## ANNUAL REPORT OF PROGRESS

The Board of Public Education will determine, by rule, what will be the opening and closing dates of the Annual Report.

The Board of Public Education will on or before September 15 of even-numbered years, report to the education interim committee on the **progress made by districts** operating under approved transformational learning plans.

HB351 includes the following elements associated with an annual report.

- Require each participating school district to submit an annual report demonstrating continued qualification for funding.
- Include a report of progress toward measurable objectives under the school district's transformational learning plan.
- The school district shall include any decrease or requested increase in the number of participating full-time equivalent educators under subsection (2) (a) of the bill for adjustments to its funding.

## ASSISTANCE

Superintendent Arntzen has hired a transformational learning manager. Technical assistance is available to any school district that has a need and is planning to apply for transformational learning funding. When emailing for assistance, be sure to include your timeline and phone number. This can be sent to [Jule Walker](#), Deputy Superintendent of Operations.



## OPI - Transformational Learning Application

### Application Window: October 1, 2019 – November 1, 2019

Background: House Bill 351, passed in the 2019 Montana state legislative session and provides state funding to school districts for the development of transformational learning programs. Transformational learning is defined in HB 351 as a flexible system of pupil-centered learning designed to develop the full educational potential of each pupil.

[House Bill 351 Link](#)

District Name: \_\_\_\_\_ Submission Date: \_\_\_\_\_

**Guidance: Use this list to ensure that your transformational learning application contains all the elements outlined in HB 351. Include the check list with your other materials that will be submitted to the OPI.**

- ☐ The district's board of trustees shall submit an application that has been approved, by motion of the board of trustees and signed by the board chair, to the Board of Public Education, on a form provided by the Superintendent of Public Instruction.
- ☐ Calculate the overall educator FTE participating in the transformational learning program.
  - ☐ \_\_\_\_\_ (List your overall FTE number per [20-9-327 \(3\), MCA.](#))
- ☐ Identify the portion of each education FTE dedicated to the district's transformational learning program. (Attach a sheet that lists the portion of educator FTE dedicated to your plan.)
- ☐ Include the district definition of proficiency as outlined in 20-9-311(4)(d). *The definition must not require seat time as a condition or other element of determining proficiency. The definition must be incorporated in the district's policies and must be used for the purpose of determining content and course mastery and other progress, promotion from grade to grade, grades, and graduation for pupils enrolled in the district's transformational learning program.* (Attach your district's definition of proficiency on a separate page.)
- ☐ Include a strategic plan with appropriate planning horizons for implementation- such as the eligibility plan, measurable objectives and planned strategies that leads to:
  - ☐ A transformational learning plan for each participating student that honors individual interests, passions, strengths, needs and culture. The plan shall be rooted in relationships with teachers, family, peers and community members.
  - ☐ Embedded community-based, experiential, online and work based learning opportunities, that incorporates blended learning.
  - ☐ Effective professional development to assist employees in transitioning to a transformational learning model.
  - ☐ Equality of educational opportunity for participation by all pupils of the district.

The school district's board chair signature affirms that the application has been completed and approved by the Board of Trustees. It is acknowledged that the full application will be kept at the district site. The checklist and attached documents is affirmation that the required elements of HB 351 are part of the application's supporting documents.

\_\_\_\_\_  
School District Board Chair Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
School District Board Chair Signature

FOR OPI USE ONLY

Date & time received by the

OPI: \_\_\_\_\_

\_\_\_\_\_ received by