

JANUARY

January	Trustees --quarterly meeting. (20-3-322(1)(d), MCA)
First Monday in January	County Superintendent begins term of office after election. (20-3-202, MCA)
January 1	Holiday--New Year's Day. (20-1-305, MCA)
January 1	Deadline for changing school district boundaries, until the second Monday of August (except for consolidation or annexation proceedings under 20-6-421 – 423, MCA election for consolidation must be made by December 31). (20-6-202 and 20-6-314, MCA)
January 1 through second Monday in August	Elementary school district boundaries may not be changed during this time except as listed in 20-6-421 through 423, MCA. (20-6-202, 20-6-314, MCA)
January 31	Bus inspections must be done for second semester. Buses must have passed inspection to be used on routes for reimbursement. (ARM 10.7.101)

FEBRUARY

February-June	Prepare the budget.
By February 1	Trustees provide District Superintendent or County High School Principal with written notice of termination. (20-4-401, MCA)
February 1 or Next school day	Trustees report official spring enrollment count for ANB purposes. (Due Feb 10) (20-9-311, MCA)
By February 15	Board of Trustees submits first semester transportation claims online to the Superintendent of Public Instruction and transmits one copy of each claim to the County Superintendent (20-10-145(2), MCA) (ARM 10.7.101)
Upon Receipt of Transportation Claims	Superintendent of Public Instruction shall establish the validity and accuracy of the claims for the state and county transportation reimbursements by determining compliance. (20-10-145(2), MCA) and ARM 10.7.101). (Payments are made usually by 3/31).
By February 22	County Superintendent electronically authorizes first semester transportation claims (consisting of one copy of each district claim). (20-10-145(2), MCA) (ARM 10.7.101)

Upon receipt of state transportation payment notice

County Superintendent orders first semester county transportation reimbursement based on state reimbursement to each district. (20-10-146, MCA and ARM 10.7.101)

MARCH

March 1

OPI sends districts the "Preliminary Budget Data Sheet" showing certified ANB, GTB subsidies, and special ed funding for the following year's budget. (MCA 20-9-369)

By March 15

County Treasurer sends all joint district revenues to designated custodian. (20-9-212(6), MCA)

By March 31

Audits by approved private auditor of districts with total federal expenditures greater than \$500,000 in a fiscal year due to Department of Administration and OPI. (i.e., "A-133 Audits")

APRIL

April

Trustees--quarterly meeting. (20-3-322(1d), MCA)

April

Board of Public Education--quarterly meeting. (20-2-112, MCA)

April 25

Districts that intend to consolidate/annex effective July 1, 2012 must notify OPI.

MAY

By May 1

Trustees apply to **County Superintendent** for school isolation status when ANB will be less than 10 for elementary or less than 25 for high school for the second consecutive year. (20-9-302(1), MCA)

By May 15

County Superintendent submits application for school isolation to County Commissioners. (20-9-302(2), MCA)

Between May 15 and June 1

County Commissioners act on application for approval of isolated schools and return application to County Superintendent. (20-9-302, MCA)

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CALENDAR OF OFFICIAL DUTIES (Cont'd)

By Third Saturday in May

Trustees hold organizational meeting. (20-3-321, MCA)

By May 24

Board of Trustees submits second semester transportation claims online to the Superintendent of Public Instruction and transmits one copy of each claim to the County Superintendent. (20-10-145(2), MCA and ARM 10.7.101)

Last Monday in May

Holiday—Memorial Day (20-1-305, MCA)

Before June 1

County Superintendent submits approved application for school isolation to Superintendent of Public Instruction who must act on the application by the fourth Monday in June. (20-9-302(3), MCA)

JUNE

June

Teachers must provide **Trustees** with written notice of acceptance of reelection (i.e., new contract) within 20 days after notice of reelection. (20-4-205 and 206, MCA)

June

Trustees are advised to issue bonds dated either in June or December such that coupons are payable in June and December. (20-9-411, MCA)

Upon receipt of transportation

Superintendent of Public Instruction shall establish the validity and accuracy of the claims for the state and county transportation reimbursements by determining compliance. (20-10-145(2), MCA) and ARM 10.7.101). (Payments are made usually by 6/30).

Upon receipt of state transportation payment notice

County Superintendent orders second semester county transportation reimbursement based on state reimbursement to each district. (20-10-146, MCA and ARM 10.7.101)

By June 1

Trustees must provide **tenured teacher** with written notice of termination. A teacher not notified is automatically reelected. (20-4-204 and 205, MCA)

By June 1

Trustees must provide **non-tenured teacher** with written notice of termination or reelection. (20-4-206, MCA)

By June 1

Trustees apply to Superintendent of Public Instruction for approval of increase in ANB (PAA-3) due to unusual enrollment increase when enrollment is expected to increase more than 6 percent ("anticipated enrollment increase"). Superintendent of Public Instruction must act by fourth Monday in June. (20-9-314, MCA)

By June 1

Trustees must submit form PAA-3 (Application of Additional ANB) to Superintendent of Public Instruction for opening a new school, creating a new 7-8 grade accredited program, or opening a new kindergarten. (20-9-313, MCA)

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CALENDAR OF OFFICIAL DUTIES (Cont'd)

- By June 1 **Trustees** apply to Superintendent of Public Instruction for opening or reopening of a high school, junior high school, middle school or elementary school. Superintendent of Public Instruction must act by fourth Monday in June. (20-9-313; elementary school: 20-6-502; middle school: 20-6-507; junior high: 20-6-505 (3), and 504(2); high school: 20-6-503, MCA)
- By June 1 **Trustees** request the county election administrator conduct a school election next year. (20-20-417, MCA)
- Before fourth Monday in June **Trustees** apply to Superintendent of Public Instruction for approval of transfer of ANB from closed school. Superintendent must approve, disapprove, or adjust the estimated ANB increase before the fourth Monday of June. (20-9-313(1)(c), MCA)
- By June 15 **County Treasurer** sends all joint district revenues to designated custodian (20-9-212(6), MCA)
- By June 15 **Trustees** pay remaining tuition amounts owed under provisions of 20-5-324 (5), MCA.
- By June 30 **Board of Trustees** may adopt a resolution for a budget amendment due to causes other than an unusual enrollment increase. (20-9-162, MCA)
- June 30 **End of school fiscal year.** All budget appropriations lapse except appropriations for "uncompleted improvements in progress on construction" and properly authorized obligations to purchase personal property in manner prescribed by Superintendent of Public Instruction. (20-1-301, 20-9-209, MCA)
- By year-end - June 30 **Trustees** designate a portion of the General Fund end-of-year cash balance as a cash reserve for the purpose of paying warrants issued from July 1 through November 30. (20-9-104, MCA)
- No Later Than June 30 **Trustees** complete budget amendment proceedings to provide budget authority for additional pupil transportation obligations arising after final budget adoption and for which the contingency item is inadequate. (ARM 10.7.101)

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CALENDAR OF OFFICIAL DUTIES (Cont'd)

By June 30 Superintendent of Public Instruction establishes the validity of valid claims submitted after May 24 and by June 30 will be paid by September 30 of the following school year. (ARM 10.7.104)

By June 30 **Audits** by approved private auditors of districts with greater than \$500,000 total revenue and less than \$500,000 federal expenditures in prior fiscal year due to Department of Administration and OPI. (i.e., "Regular Audit" or "Yellow Book Audit") **Financial Reviews** by approved private auditors of districts with less than \$500,000 total revenue in prior fiscal year due to Department of Administration and OPI

By June 30 **Trustees** of each district shall provide an out of district attendance report to the Superintendent of Public Instruction (FP-15) for:

1. Resident students attending public schools out of state in the previous school year, for which the district paid tuition.
2. Resident students attending day-treatment programs under approved individualized education programs (IEP) at private, nonsectarian schools in the previous school year.

For students attending under mandatory agreements pursuant to 20-5-321(1)(d) or 1(e):

3. The name and district of residence of each child who attended a school of the district under mandatory out of district attendance agreement (form FP-14) approved under the provisions of 20-5-321(1)(d) or (1)(e) in the previous school year. **Note:** In July of each year **districts** will use MAEFAIRS to enter days enrolled electronically.

Before fourth Monday in June **Trustees** act on any applications for increased individual transportation reimbursement due to isolation of the transportee. (20-10-132(c), MCA)

JULY

July **Montana Highway Patrol** will perform the first semiannual inspection of school buses at least 30 days prior to the beginning of the school term and re-inspect the buses, if necessary, before the beginning of the school term. (ARM 10.7.101) and (61-9-502, MCA).

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July **Board of Public Education**--quarterly meeting. (20-2-112, MCA)

By fourth Monday in July	County Transportation Committee approves/amends bus routes and acts on applications for increased individual transportation payments due to isolation. (ARM 10.7.101)
Before July 1 of third year	County Superintendent must notify any non-operation district that the district will be abandoned after 3 years of non-operation. (20-6-209(2), MCA)
By July 1	District Clerk transmits to the County Superintendent the TR-4 individual transportation contracts together with any new bus contracts. (ARM 10.7.101)
July 1	TR-4 Transportation Contracts must be completed. Contracts may be completed after this date for students who move into the district or become eligible transportees after this date. (20-10-124(2), MCA and ARM 10.7.101)
July 1	Chairman of the Board of Trustees and parents or guardians of pupils to receive transportation services in ensuing year, complete and sign three copies of contracts for transportation as a prerequisite to including such transportation expenditure in the ensuing year's budget. Board of Trustees also complete with bus contractor(s) any new bus contracts for ensuing year. (20-10-124(2), MCA and ARM 10.7.101)
July 1	Beginning of School Fiscal Year. (20-1-301, MCA)
July 1	Trustees of any non-operating district establish a Non-operating Fund. (20-9-505, MCA)
July 4	Holiday—Independence Day. (20-1-305, MCA)
By July 10	County Treasurer prepares cash balance statement for each district and for the county school funds and delivers such statements to the County Superintendent. (20-9-121, MCA)
By July 10	Board of Trustees of school district with state-approved traffic education program submits application for state reimbursement to Superintendent of Public Instruction. (20-7-502, MCA and ARM 10.13.309)
By July 30	County Superintendent checks transportation contracts and transmits one copy of each individual and increased individual
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	transportation contract to Superintendent of Public Instruction. Two copies are returned to the school district. (20-10-124(4), MCA and ARM 10.7.106)
Between July 1 & Aug 10	County Superintendent of both counties in which a joint district is situated exchange the "Joint District Basic Data Transmittal Form."

Between July 1 and Aug 4

Clerk of each district publishes notice concerning availability of budget for inspection and also the schedule for final budget meeting. Any taxpayer in the district may appear at the meeting and be heard for or against any part of the budget (20-9-115, MCA)

AUGUST

August

Trustees - Quarterly meeting (20-3-322(1d), MCA)

Before August 1

Trustees must have conducted an election for authority to adopt an over-base general fund budget that does not exceed the general fund budget limitations. (20-9-353, MCA)

By first Monday in August

County Assessor (Department of Revenue) transmits a statement of the assessed valuation, taxable valuation and certified mills of each school district and each city and town to County Superintendent and to all involved County Superintendents and County Commissioners for joint districts (20-9-122 and 15-10-202, MCA)

First Monday in August

County Superintendent of county where school is located transmits "Joint District Tax Levy Summary Form" to County Superintendent of county where school is not located.

Before second Monday in August

County Superintendent estimates revenue by fund and any other August statistical data. (20-9-141, MCA and others)

On or before August 15

Trustees of each district must meet to adopt final budget. Upon adoption, the final budget is signed by the Chairman of the Board of Trustees and the District Clerk. (Meeting may be continued from day-to-day until the fourth Monday in August. If any line item of a budget provides payment of wages/salary for more than one person, district must submit a list of compensation for each position.) (20-9-131 through 133, MCA)

By August 15

Trustees submit annual Trustees' Financial Summary to **County Superintendent**. (20-9-213, MCA)

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CALENDAR OF OFFICIAL DUTIES (Cont'd)

Within five days after budget meeting

District transmits copy of Final Budget and Trustees' Financial Summary to County Superintendent. (20-9-131, MCA)

By Friday preceding the fourth Monday in August

County Superintendents of each county involved in a joint district must finalize a joint statement of the mills needed for each budgeted fund of a joint district. Deliver the statement to County Commissioners of each county. (20-9-151, MCA)

By fourth Monday in August

County Superintendent computes levy requirements for each district. For joint districts the deadline is the Friday before the

fourth Monday of August (20-9-151, MCA). (general 20-9-141,; retirement 20-9-501, building reserve 20-9-502 to 503, non-operating 20-9-506, transportation 20-10-144, bus depreciation reserve 20-10-147, adult education 20-7-705, debt service 20-9-438 to 439)

Fourth Monday in August **County Superintendent** presents County Commissioners with approved district budgets and with requirements for tax levies. (20-9-141 and 142, MCA)

Fourth Monday in August **County Commissioners** shall fix levies on taxable value of all property within each district (Commissioners/other officers may be individually liable if debt service levy is not set as required by 20-9-444, 20-9-142 and 152, MCA.)

By August 31 **Superintendent of Public Instruction** orders state reimbursement for traffic education programs to qualifying districts and transmits payments to County Treasurers. (20-7-506, MCA and ARM 10.13.309)

SEPTEMBER

September **Board of Public Education**--quarterly meeting. (20-2-112, MCA)

First Monday in September
September 10 Holiday--Labor Day. (20-1-305, MCA)
Birthday cutoff date for 5-year-olds entering kindergarten (20-7-117, MCA).

September 10 **Birthday cutoff** date for 19-year-olds in ANB counts. Students who reach age 19 on or before September 10 of the school year may not be counted for ANB. (20-1-101 and 20-5-101, MCA)

September 15 **County Treasurer** sends all joint district revenues to designated custodian (20-9-212(6), MCA)

No later than September 15 **County Superintendent** submits an annual report (Trustees' Financial Summary) to the Superintendent of Public Instruction. Report contains end-of-year financial report for each school

2-0100.00 CALENDAR OF OFFICIAL DUTIES (Cont'd)

district and any other information requested by the Superintendent of Public Instruction. (20-9-211, 20-3-209, MCA)

Second Monday in September **County Superintendent** must complete budget form for each district and submit to the Superintendent of Public Instruction. In MAEFAIRS both the Trustees Financial Summary and the budget will be submitted at the same time. NOTE: for districts not using MAEFAIRS for reporting purposes please send a copy to the Superintendent of Public Instruction. (20-9-134, MCA)

OCTOBER

By October 1	District Clerk submits to County Superintendent and Public Instruction each "Application for Registration of School Bus and State Reimbursement" (Form TR-1) for approved bus routes of eligible riders only. (ARM 10.7.101)
October	Trustees --quarterly meeting. (20-3-322(1d), MCA)
October	Teacher or Specialist must register his teaching certificate with County Superintendent within 60 days after starting work (salary is not paid if certificate is not registered within 60 days). (20-4-202, MCA)
October	Bus drivers must have completed the first-aid competency requirement within 60 days of school beginning or 60 days of date of employment. (ARM 10.7.101)
First Monday in October	Trustees report official fall enrollment count for ANB purposes. (20-9-311, MCA)
After 1st Monday in October	Trustees may petition the Superintendent of Public Instruction to adopt a budget amendment for unusual enrollment increase under 20-9-161 through 168, MCA.
By mid-October	Superintendent of Public Instruction must notify county superintendents and district clerks of approved rates for individual and isolated contracts. (ARM 10.7.101)
In mid-October	Board of Trustees transmits "Fall Report" (ADC Report) to Superintendent of Public Instruction and County Superintendent for school accreditation and other purposes. (20-7-102, MCA)
Upon receipt of state approved transportation rates	County Superintendent notifies County Treasurer of details of approved transportation contracts.

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NOVEMBER

By November 1	District Clerk sends the County Superintendent one copy of each "Application for registration of School Bus and State Reimbursement" (Form TF-1) and submits a TR-1 for each bus route to the Superintendent of Public Instruction (ARM 10.7.101)
By November 10	County Superintendent electronically verifies each "Application for Registration of School Bus and State Reimbursement" (Form TR-1) (ARM 10.7.101)
By November 10	Superintendent of Public Instruction completes action on all applications for increased rates for individual transportation, establishes transportation payment responsibility of multiple

districts providing transportation services to the same family, and notifies County Superintendent and the Responsible School Official of approved rates for individual payments. (20-10-112(6) and 142(3), MCA)

Fourth Thursday

Holiday—Thanksgiving Day. (20-1-305, MCA)

By mid-November

Superintendent of Public Instruction acts on county-approved applications for approval of isolated schools and notifies County Superintendent and Board of Trustees of action. (20-9-302, MCA)

By mid-November

Superintendent of Public Instruction must notify county superintendents and district clerks of approved rates for individual and isolated contracts. (ARM 10.7.101)

Mid- November

Superintendent of Public Instruction completes action on all applications for increased rates for individual transportation, establishes transportation payment responsibility of multiple districts providing transportation services to the same family, and notifies County Superintendent and the Responsible School Official of approved rates for individual payments. (20-10-112(6) and 142(3), MCA)

DECEMBER

December

Trustees are advised to issue bonds dated either in June or December so that coupons are payable in June and December. (20-9-411, MCA)

December

Trustees must pay at least half of the tuition owed to each district on the notification under provisions of 20-5-324(5), MCA.

December

Board of Public Education—quarterly meeting (20-2-112, MCA)

December 10

Recommended final day to submit Trustees Financial Summary corrections. Submitted corrections corrected by OPI by December 20.

By December 15

County Treasurer sends all joint district revenues to designated custodian. (20-9-212(6), MCA)

December 25

Holiday—Christmas Day. (20-1-305, MCA)

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CALENDAR OF OFFICIAL DUTIES (Cont'd)

UNDATED DUTIES:

Monthly

County Treasurer must give itemized financial statement to Trustees monthly. (20-9-212(10), MCA)

Within 10 days after the conclusion of each school semester

Teacher must provide annual attendance report to District Superintendent, Principal or County Superintendent (salary is withheld until report is submitted). (20-4-301(1d), MCA)

District Superintendent or County High School Principal must report cumulative pupil attendance and pupil absence of the district to the County Superintendent. (20-4-402 and 403, MCA)

To commence within nine months of close of last fiscal audit period

Approved private auditor audits accounts of districts with greater than \$500,000 total revenue and less than \$500,000 federal expenditures in a fiscal year (i.e., "Regular Audit" or "Yellow Book Audit"). Audit is due to OPI by 6/30 of the year following the year being audited. (20-9-203 and 504, MCA)

At any time

Board of Trustees of school district preparing to offer a traffic education program applies to Superintendent of Public Instruction for approval prior to beginning the program to comply with requirements for state reimbursement. (20-7-502, MCA)

Whenever required

Board of Trustees completes transportation contracts with individuals who move into the district after the adoption date of the budget or with those who, for other reasons, become eligible for transportation. **Trustees** submit contracts online to the Superintendent of Public Instruction and send one copy to the County Superintendent. (20-10-124, MCA)

Whenever required

Board of Trustees issues Montana Schools Bus Driver Certification to bus driver, submits information online to the Superintendent of Public Instruction and transmits required copies to County Superintendent and Superintendent of Public Instruction. (20-10-103, MCA)

Whenever required, upon receipt by the county of revenues for current school budgets

County Superintendent apportions all school moneys for current budgets to the school district and certifies the amounts apportioned to each Board of Trustees and the County Treasurer.

Once every three years

County Superintendent shall review existing school district boundaries. (20-6-215, MCA)

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Elections (see MASBO School Election Handbook for more information)

Election Day minus 135 to 40 days before the election.	Trustee candidates may file for election from 135 days before the election (13-10-201, 20-3-305 and 20-3-344, MCA)
Election Day minus 75	Voters may request an absentee ballot through noon on the day before the election. (13-13-211, MCA)
Election Day minus 40	Trustees shall call each election by resolution. (20-20-201(1) and 203, MCA)
Election Day minus 35	Trustees must send a copy of the election resolution to the county election administrator. (20-20-201(2) and 203, MCA)
Election Day minus 30	Registration for election closes. (20-20-311 and 312, MCA)
Not less than Election Day minus 25	Clerk of district prepares certified list of candidates and official wording of each ballot issue. (20-20-401, MCA)
Not less than Election Day minus 26	Deadline for write-in candidates to file declaration of intent.(13-10-211(3), MCA)
Election Day minus 20	Trustees must have absentee ballots printed and available (20-20-401, MCA)
Election Day minus 10	Trustees must appoint election judges. (20-20-203, MCA)
Election Day minus 1	Trustees provide ballots and supplies at each polling place. (20-20-401(3), MCA)
Election Day minus 1	Absolute last day for write-in candidates to file a declaration of intent in by 5 p.m. cases where the candidate for the office the write-in candidate seeks dies, withdraws or is charged with a felony offense less than 15 days before the election. (13-10-211, MCA)
Election Day (20-20-105, MCA)	The election administrator must prepare polling places, print ballots, ensure election judges are present and conduct a fair and unbiased election. (Title 13, Chapter 13; 20-20-203, 20-20-401 and 20-20-411, MCA)
Election Day plus 15	Trustees certify election results. (20-20-416, MCA)
Election Day plus 15	Newly elected candidates complete and file oath of office with the county Superintendent. (20-3-307, MCA)

Please submit suggested additions to this calendar to OPI.