



**Request for Exception to the  
Authorized Representative (AR)**  
Includes School Districts, Special Education  
Cooperatives, and Community-Based Organizations

**I. Authorized Representative (AR) of a School District** - The Board of Trustees has the authority to act on behalf of the school district. The authorized representative (AR) of the school district receiving federal and/or state grants is:

- The school district superintendent.
- The principal, if there is no school district superintendent.
- The county superintendent, if there is no school district superintendent or principal.

**NOTE:** If a new person is hired into one of the positions listed above in which the person leaving was the AR or was an exception to the AR (see *III. Exception to the AR* below) email [centralupdates@mt.gov](mailto:centralupdates@mt.gov).

**II. Authorized Representative of a Subgrantee that is not a School District** - The chairperson of the managing board or committee of the subgrantee organization is assumed to be the authorized representative, unless the board designates an alternative by submitting this form to the OPI. Such organization include but are not limited to:

- For-profit community-based organizations.
- Nonprofit community-based organizations.
- Faith-based organizations.
- Tribal colleges or tribal governments.
- A unit of the university system.

**III. Exception to the AR** - Although the AR role is presumed to follow the rules above, the trustees may request an exception to the rule in order to designate the board chair, another board member, or employee in the role of AR for the board. *Minutes relative to this action must accompany this form.* The designee will act legally on behalf of the trustees as the sub-recipient of federal and state grants. All related correspondence to the local education agency will flow through the designee.

The designee assignment and position will remain in effect until the OPI receives notice of a change (see *NOTE* above).

The role of the AR is explained in Section 700-1 of the State and Federal Grants Handbook: [700 Specialized Duties of Recipients](#).

**Submit the Form** - The Board Chairman may submit the form and the board minutes by fax 406-444-1369 or by mail: Office of Public Instruction, Attn: Jay Phillips, PO Box 202501, Helena, MT 59620-2501.

**Contact Information** - If you have questions regarding this form, please contact Jay Phillips by telephone at 406-444-4523 or by email at [jphillips3@mt.gov](mailto:jphillips3@mt.gov).

**New Designee Information**

\_\_\_\_\_  
Name of School District or Organization

\_\_\_\_\_  
Date

\_\_\_\_\_  
New Designee Name (Please print first and last name)

\_\_\_\_\_  
Position

\_\_\_\_\_  
New Designee Telephone Number

\_\_\_\_\_  
New Designee Email Address

**Attach the official meeting minutes** from the Board of Trustees authorizing the AR representative change for the district or other entity.

**Board Chair Approval** - With my signature below, I certify the accuracy of the information submitted on this form.

\_\_\_\_\_  
Signature of Board Chair

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

**OPI Use Only**

Approved

Disapproved

\_\_\_\_\_  
OPI Fiscal Services Division Administrator Signature

\_\_\_\_\_  
Date