



Montana Office of Public Instruction

## INVITATION TO APPLY

TRANSFORMATIONAL LEARNING GRANT OPPORTUNITY

### HB089

**ISSUED BY**

Montana Office of Public Instruction  
1227 11th Avenue, 2<sup>nd</sup> Floor  
Box 202501  
Helena, MT 59620-2501

**Application Opens: 8:00 a.m. Monday, December 5, 2022**

**Application Deadline:  
5:00 p.m. Monday, January 9th, 2023**

Questions regarding this application should be directed to:

Montana Office of Public Instruction  
1227 11th Avenue, 2<sup>nd</sup> Floor  
Box 202501  
Helena, MT 59620-2501  
Krystal Smith: [Krystal.smith@mt.gov](mailto:Krystal.smith@mt.gov)

## OVERVIEW

When the 2019 Legislature adjourned, House Bill 351, sponsored by Representative Wendy McKamey, had passed and was subsequently signed into law by Governor Steve Bullock. HB 351 amends section 20-9-116, MCA, and revises education laws to support transformational learning. Transformational learning is defined in the bill as a flexible system of pupil-centered learning that is designed to meet the Montana Constitutional Mandate “to develop the full educational potential of each person. In the 2019 legislative session, HB351 was changed to HB089, changing the first-come, first-served ranking to a lottery system.

### Further definition is provided in the bill as to what outcomes should be addressed:

- 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 of the application as found in HB 351 include:

- Identify the number of full-time equivalent educators meeting the criteria of 20-9-327(3) who will participate in your district’s transformational learning program with full-time equivalent assignment that is dedicated to 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). Remember, seat time cannot be required as a condition or other element of determining proficiency. The definitions must be incorporated into your district’s policies and must be used for the purposes of determining content and course mastery and any other progress for pupils enrolled in your district’s transformational program.
- Include a strategic plan with appropriate planning horizons for implementation (such as the four-year eligibility timeline), 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 foster 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 your 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 of the FY 2024 Application:** December 5, 2022 – January 9, 2023
- **Deadline for FY 2023 Funded Districts Annual Report for The Board of Public Education:** 5:00p.m. MST January 9, 2023
- The application is available on the OPI website (Transformational Learning Page). This web page will also have 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

Districts are eligible for four consecutive years of funding. However, the Transformational Learning Bill ends in FY2027. Due to the current waitlist for funds, it is anticipated that districts applying in FY2024 will receive a maximum of three years of funding.

For FY 2024, payments are to be made no later than October 1, 2022. Districts are to deposit these state payments into the school district flexibility fund. The OPI will provide the state payment based on the timeline established by The Board of Public Education.

FISCAL YEAR	½ QEC	STATEWIDE FTE	% OF FTE	TOTAL FUNDS AVAILABLE
2020	\$1637.50	12,619	5.0%	\$1,033,151
2021	\$1667.50	12,619	7.5%	\$1,578,118
2022	\$1689.00	12,619	10.0%	\$2,131,287
2023	\$1716.00	12,619	10.0%	\$2,165.420

### Permissive Levies

HB 351 allows additional funding that can be permissively levied by the school district to your flexibility fund in an amount up to the state transformational learning payment received by the school district. Remember, if you are intending to permissively levy for transformational learning, the notice to levy increases are due by March 31 in compliance with 20-9-116, MCA.

Section 2(5)(b) provides that a school district's trustees may transfer 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 to be received, to prepare and adopt district budgets with proper budget authority. The Board of Public Education will meet in January of 2023 to qualify FY 2024 districts in time for permissive levy notifications.

**Funding for newly-applying districts in FY24 will be based on a lottery system, conducted by an independent 3rd party upon meeting the requirements of the application.**

# ANNUAL REPORT

A funded district’s FY 2023 annual report is due Monday, January 9, 2023. Districts that are anticipating increase FTE involved in their transformational plan will compete with new districts for a spot on the priority list, through a lottery system. The following is the **minimum** required in your district’s annual report for continued qualification.

- 1. Measurable objectives from your strategic plan:
  - Data Collected
    - Qualitative
    - Quantitative
- 2. Full time educator equivalent (FTE): \_\_\_\_\_
  - Increase in participating educators \_\_\_\_\_
  - Decrease in participating educators \_\_\_\_\_

### Cause of increase or decrease

- 3. Include any decrease or requested increases in the number of participating full-time equivalent educators under subsection 2 (a) of the bill for adjustments to your funding. An expansion in funding of a previously approved plan is contingent upon the availability of funds.
- 4. The number of students served:
  - Total number of students served: \_\_\_\_\_
  - Grade Levels involved
  - Ages/span of grades
- 5. Summary:
  - Lessons learned,
  - Adjustments planned,
  - Rationale for planned expansions or reductions
- 6. Detailed budget of how funds were spent

An annual report template is provided for districts to use as a guideline. The template is not the required format.

# ASSISTANCE

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: [krystal.smith@mt.gov](mailto:krystal.smith@mt.gov).