



Cover Letter

July 22, 2025

Transformational Learning District Leader,

The Montana Office of Public Instruction (OPI) is pleased to announce the application window for Phase II of the Montana Transformational Learning Grant, established in alignment with [House Bill 573](#) (HB 573).

The purpose of this grant is to further develop the efforts of the most innovative transformational learning grantees toward district-wide implementation of transformational and proficiency-based learning, as defined in [MCA 20-7-1601](#) and to use the knowledge gained by Phase II grantees to develop recommendations and guidance for other districts interested in innovating in a similar manner.

No later than July 15, 2026, and contingent on appropriation from the legislature, the OPI will distribute funds to no more than five districts selected to participate in a Transformational Learning Phase II grant. Award amounts will be based on each district's size and the costs outlined in its application, utilizing 90% of the amount appropriated by the legislature for the grants, which is approximately \$2.5 million total in fiscal year 2027.

Application Timeline

- **Application Window:** September 1 – October 31, 2025
- **Present recommended Five Districts the Board of Public Education:** January 2026
- **Districts Notified of Selection:** April 1, 2026
- **Funds Deposited in Awardees' Flex Funds:** July 15, 2026

Successful Phase II grantees will be expected to demonstrate continued commitment to transformational and proficiency-based learning and to provide a joint report to the Education Interim Committee and the Education Interim Budget Committee no later than September 1, 2028, detailing the progress made by the grantees.

We look forward to receiving your application and partnering with you to advance Montana's vision for innovative, proficiency-based education.

Sincerely,
Susie Hedalen
State Superintendent
Montana Office of Public Instruction



Montana Transformational Learning Grant Phase II Grant Application Form

Introduction

The purpose of this grant, per HB 573, is to further develop the efforts of the most innovative transformational learning grantees toward district-wide implementation of transformational and proficiency-based learning, and to use the knowledge gained by Phase II grantees to develop recommendations and guidance for other districts interested in innovating in a similar manner.

District Information

- **District Name:** _____
- **Contact Person:** _____
- **Title:** _____
- **Email:** _____
- **Phone Number:** _____
- **Mailing Address:** _____

Section 1: Evidence of Progress Made

In accordance with MCA 20-7-1601, please provide a clear and concise summary of your district's progress in implementing transformational and proficiency-based learning to date.

- **Describe specific strategies or initiatives your district has implemented.**
- **Include data or evidence of the impact of district strategies or initiatives (e.g., participation rates, pilot programs, student outcomes, stakeholder engagement, professional development).**
- **Attach supporting documents and letters of support if relevant.**



Section 2: Description of Continued Progress and Cost Estimates

Provide a detailed narrative of how your district plans to continue progress toward district-wide implementation of transformational and proficiency-based learning. Then use the chart below, or a similar chart, to outline the following information.

- **Describe key activities, goals, and timelines for Phase II.**
- **Explain how your staff, students, families, school board, and community will be engaged.**
- **Provide estimated costs for each major activity.**

Planned Activities & Estimated Costs (sample chart template to use)

| Activity | Description | Estimated Cost |
|-----------------------------------|--|----------------|
| Example: Professional Development | Workshops and coaching for teachers | \$ |
| Example: Technology Support | 1:1 learning devices | \$ |
| Example: Personnel Costs | Train the trainer reimbursement stipends | \$ |
| | Total Estimated Phase II Budget: | \$ |

Section 3: District Assurances

By submitting this application, the district assures it will:

- ☒ **(a)** Further develop district-wide implementation of transformational and proficiency-based learning as defined in MCA 20-7-1601.
- ☒ **(b)** Use knowledge gained during Phase II to develop recommendations and guidance for other Montana districts interested in innovating.
- ☒ **(c)** Engage in technical assistance and collaborative opportunities with other Transformational Learning grantees to collaborate in learning and share best practices and resources statewide.
- ☒ **(d)** Provide a joint report with other grantees to the Education Interim Committee and the Education Interim Budget Committee no later than September 1, 2028 on the progress made through this grant opportunity.



Authorized Signatures

I hereby certify that the information provided in this application is accurate and that the district agrees to the assurances stated above.

Superintendent Name: _____

Superintendent Signature: _____

Date: _____

School Board Chair Name: _____

School Board Chair Signature: _____

Date: _____

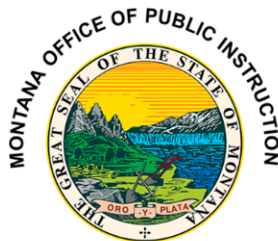
Attachments Checklist

- ☐ Summary and evidence of current progress
- ☐ Narrative of Phase II district-wide implementation
- ☐ Budget chart including activities, descriptions, and pricing
- ☐ Letters of Support and additional documents (optional)

Submission Instructions

Please submit your completed application and any additional documents by October 31, 2025 at 5pm using the Qualtrics survey button found on the [OPI Transformational Learning website](#).

For questions, please contact: Krystal Smith, Education Innovation Manager at krystal.smith@mt.gov. Please find the evaluation rubric attached.



Phase II Transformational Learning Grant Application Evaluation Rubric

| Criteria | Exemplary (5) | Proficient (3) | Developing (1) |
|---|---|--|---|
| Evidence of Impact from Previous Transformational Learning Funding | Provides clear, compelling evidence with data, examples, and stakeholder engagement. | Provides adequate evidence with some examples and limited data. | Lacks clear evidence or provides only general statements. |
| Description of Continued Progress | Detailed plan with clear goals, timelines, roles, and alignment to HB 573 purpose. | Adequate plan with general goals and timelines. | Vague plan with few details or unclear alignment. |
| Cost Estimates & Budget | Cost estimates are detailed and aligned with planned activities. | Cost estimates generally align but lack detail. | Cost estimates are unclear or misaligned. |
| District Assurances and Documentation | All required names, signatures, and dates are included, signifying district's understanding of assurances and commitment to implementing a proficiency-based learning system district-wide. | Missing a required name, signature, and/or date, making it unclear of the district's understanding of assurances and commitment to implementing a proficiency-based learning system district-wide. | No required names, signatures, and dates are included, signifying district's lack of understanding of assurances and commitments. |
| Clarity & Completeness | Application is clear, well-organized, complete, and on-time with all required documentation. | Application is understandable but may have minor gaps. | Application is unclear or missing key information. |

Total Score: ____ / 25

Evaluators Comments:
