

SFIC Work Plan (Phase II only; working draft for review/discussion/modification at June 17-18 meeting)

|                                                                                                             | CALENDAR YEAR 2026                                         |                                                                                                                                                                                          |                                                                                                                       |                                                                                                                                                                                                                            |                                                                                                                 |                                                                                       |
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|                                                                                                             | Jan 13<br>Zoom only                                        | Feb 11-12<br>Helena                                                                                                                                                                      | April 7-8<br>Helena                                                                                                   | June 17-18<br>Helena                                                                                                                                                                                                       | July 20-21<br>Helena                                                                                            | Aug 12-13<br>Helena                                                                   |
| Phase II: School Funding Formula Analysis and Recommendations                                               |                                                            |                                                                                                                                                                                          |                                                                                                                       |                                                                                                                                                                                                                            |                                                                                                                 |                                                                                       |
| Develop understanding of Montana's current funding formula, litigation history, issues with current formula | RFP update<br>Feb outline<br>Funding training<br>(if time) | All funds overview<br>Dist GF deep dive<br>Inflation Analysis<br>Sp Ed - high-cost IEPs<br>Facilities needs<br>English Learners<br>Mental Health<br>Cost of living<br>Levy passage rates | APA analysis of MT formula and comparison with other states<br>Further explore identified issues with current formula | Further explore identified issues with current formula as directed by the Commission<br>Examine revenue (including countywide BASE and HB 483)<br>CAMPS follow-up; graphic<br>Special Education<br>Facilities<br>Inflation | Completed                                                                                                       | Completed                                                                             |
| Conduct consultant-advised cost study using successful schools methodology                                  |                                                            | Intro APA<br>Overview methodology<br>Define successful school                                                                                                                            | Study update and discussion<br>Commission direction as needed                                                         | Study results<br>Consultant analysis<br>Discuss findings                                                                                                                                                                   | Follow-up as needed<br>Consultant report                                                                        | Follow-up as needed<br>Dashboard update?                                              |
| Analyze alignment of IEEWG recommendations and existing funding formula; consider changes                   |                                                            |                                                                                                                                                                                          | Staff and NCEE analysis<br>NCEE Latest Learnings<br>Commission discussion                                             | Integrate in SSD and Potential Findings                                                                                                                                                                                    | Completed                                                                                                       | Completed                                                                             |
| Develop SFIC findings, recommendations, draft legislation incorporating public comment                      |                                                            |                                                                                                                                                                                          | Workshop potential findings and recs<br>Discuss potential legislation                                                 | Follow-up as needed<br>Identify findings and recs, including additional potential legislation<br>Review potential legislation                                                                                              | Follow-up ONLY on specific findings and recs identified in June<br>Review report outline with findings and recs | Review and vote on potential legislation                                              |
| Finalize and Publish SFIC report by Sept. 1, 2026                                                           |                                                            |                                                                                                                                                                                          |                                                                                                                       |                                                                                                                                                                                                                            |                                                                                                                 | Provide draft report in advance<br>Public comment<br>Commission revision and approval |