



SCHOOL FUNDING INTERIM COMMISSION

69th Montana Legislature

SENATE MEMBERS

Becky Beard
Forrest Mandeville
Jacinda Morigeau
Sara Novak
Sue Vinton
Jonathan Windy Boy

HOUSE MEMBERS

Brad Barker
David Bedey
Lee Deming
Eric Matthews
Luke Muszkiewicz
Melissa Romano
Jolanda Songer

NON-LEGISLATOR MEMBERS

Tom Burnett
Clayton Christian
Rachel Green
Susie Hedalen
Martha Potter
Matt Schreiber
Tim Tharp
Mike Waterman

COMMITTEE STAFF

Pad McCracken – Lead Staff
Julia Pattin - Fiscal Staff
Laura Sankey Keip – Legal Staff
Katharine Johnson - Fiscal Staff
Rebecca Brown - Research Staff
Jolanda Songer - Secretary

MINUTES LOG

April 07, 2026
Room 317 & Zoom
Helena, Montana

Minutes logs provide an annotation of the time elapsed between the beginning of a meeting and the time at which a topic is presented or discussed, a motion made, or a vote taken. The time designation may be used to locate the referenced discussion in the video. The minutes log is only a guide to the video of the meeting. The official record of the meeting is the video. Minutes logs can be accessed at <https://committees.legmt.gov> and videos can be accessed at <https://media.legmt.gov>.

For more information, please contact:

The Legislative Services Division at 406-444-3064 for policy committees;
The Legislative Fiscal Division at 406-444-2986 for fiscal committees; or
The Legislative Audit Division at 406-444-3122 for the Legislative Audit Committee.

MEMBERS PRESENT:

Rep. David Bedey, Presiding Officer (R)
Rep. Eric Matthews, Vice Presiding Officer (D)
Rep. Brad Barker (R)
Sen. Becky Beard (R)
Tom Burnett
Rep. Lee Deming (R)
Supt. Susie Hedalen
Sen. Forrest Mandeville (R)
Sen. Jacinda Morigeau (D)
Rep. Luke Muszkiewicz (D)
Sen. Sara Novak (D)
Martha Potter – Via Zoom
Rep. Melissa Romano (D)
Matt Schreiber
Tim Tharp
Sen. Sue Vinton (R) – Via Zoom
Mike Waterman

MEMBERS EXCUSED:

Clayton Christian
Rachel Green
Sen. Jonathan Windy Boy (D)

MEMBERS ABSENT:

MONTANA LEGISLATIVE BRANCH MANAGEMENT: JERRY HOWE, LEGISLATIVE SERVICES EXECUTIVE DIRECTOR • ANGUS MACIVER, LEGISLATIVE AUDITOR • AMY CARLSON, LEGISLATIVE FISCAL ANALYST • TODD EVERTS, LEGAL SERVICES DIRECTOR • DALE GOW, CHIEF INFORMATION OFFICER • RACHEL WEISS, RESEARCH DIRECTOR • ANGIE CARTER, FINANCIAL OFFICE DIRECTOR • KELLY DASILVA HR DIRECTOR

STAFF PRESENT:

Pad McCracken, Lead Staff
Julia Pattin, Fiscal Staff
Laura Sankey Keip, Legal Staff
Katharine Johnson, Fiscal Staff
Rebecca Brown, Research Staff
Jolanda Songer, Secretary

AGENDA ([Attachment 1](#))

VISITORS' LIST ([Attachment 2](#))

CALL TO ORDER/ROLL CALL

08:01:08 Presiding Officer David Bedey called the meeting to order at 8:01 AM. The committee secretary took roll.

REVIEW COMMISSION CHARGE, UPDATED WORK PLAN, AND MEETING AGENDA

08:02:56 Pad McCracken, Lead Staff, Legislative Services Division (LSD)

[EXHIBIT 1](#)

[EXHIBIT 2](#)

08:04:44 Becca Brown, Research Staff, LSD

(See Exhibit 1)

08:06:12 Pad McCracken, LSD

(See Exhibit 1)

Commission Questions / Discussion

08:21:58 Sen. Becky Beard

08:22:27 Pad McCracken, LSD

08:23:05 Supt. Susie Hedalen

REVIEW COMMISSION CHARGE, UPDATED WORK PLAN, AND MEETING AGENDA - Continued

08:23:31 Pad McCracken, LSD

(See Exhibit 2)

(See Attachment 1)

ANALYSIS OF MONTANA SCHOOL FUNDING FORMULA AND COMPARISON TO OTHER STATES

Foundation Formula Components

08:28:39 Justin Silverstein, Co-CEO, Augenblick, Palaich and Associates (APA)
Consulting

[EXHIBIT 3](#)

Commission Questions / Discussion

08:36:09 Commissioner Matt Schreiber
08:36:45 Justin Silverstein, APA Consulting
08:38:55 Sen. Forrest Mandeville
08:39:34 Justin Silverstein, APA Consulting

Foundation Formula Components - Continued

08:41:10 Justin Silverstein, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

08:44:13 Commissioner Mike Waterman
08:44:45 Justin Silverstein, APA Consulting

Economically Disadvantaged

08:46:22 Dr. Amanda Brown, Vice President, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

08:52:01 Commissioner Matt Scheiber
08:52:48 Dr. Amanda Brown, APA Consulting
08:54:48 Justin Silverstein, APA Consulting
08:55:49 Commissioner Tom Burnett
08:56:01 Dr. Amanda Brown, APA Consulting

English Learners

08:57:15 Dr. Amanda Brown, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

09:00:12 Rep. Lee Deming
09:00:30 Justin Silverstein, APA Consulting

English Learners - Continued

09:01:18 Dr. Amanda Brown, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

09:02:04 Commissioner Tom Burnett
09:02:16 Dr. Amanda Brown, APA Consulting

Special Education

09:02:40 Dr. Amanda Brown, APA Consulting

Commission Questions / Discussion

09:05:53 Commissioner Matt Schreiber
09:06:56 Dr. Amanda Brown, APA Consulting
09:07:57 Presiding Officer David Bedey
09:08:17 Commissioner Mike Waterman
09:08:36 Dr. Amanda Brown, APA Consulting
09:09:13 Justin Silverstein, APA Consulting
09:10:27 Sen. Sara Novak
09:11:53 Commissioner Matt Schreiber
09:12:42 Justin Silverstein, APA Consulting
09:14:47 Sen. Sara Novak
09:16:43 Supt. Susie Hedalen
09:17:33 Presiding Officer David Bedey
09:18:14 Sen. Sara Novak
09:19:14 Presiding Officer David Bedey
09:19:43 Dr. Amanda Brown, APA Consulting
09:20:52 Commissioner Tim Tharp
09:22:17 Commissioner Martha Potter
09:26:57 Sen. Becky Beard
09:27:43 Dr. Amanda Brown APA Consulting
09:28:38 Supt. Susie Hedalen
09:31:19 Presiding Officer David Bedey
09:31:42 Commissioner Mike Waterman
09:32:24 Dr. Amanda Brown, APA Consulting
09:33:05 Rep. Lee Deming
09:33:12 Commissioner Mike Waterman
09:34:24 Presiding Officer David Bedey
09:35:15 Sen. Sara Novak

Special Education - Continued

09:36:03 Dr. Amanda Brown, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

09:37:20 Presiding Officer David Bedey
09:38:15 Dr. Amanda Brown, APA Consulting

09:39:44 Commissioner Matt Schreiber
09:41:16 Supt. Susie Hedalen

Grade Span Adjustments

09:42:44 Dr. Amanda Brown, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

09:44:51 Commissioner Martha Potter
09:45:14 Dr. Amanda Brown, APA Consulting

Career and Technical Education Funding

09:46:50 Dr. Amanda Brown, APA Consulting
(See Exhibit 3)

Overlapping District Characteristic Adjustments

09:47:46 Dr. Amanda Brown, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

09:50:10 Commissioner Matt Schreiber
09:52:27 Dr. Amanda Brown, APA Consulting
09:55:13 Rep. Luke Muszkiewicz
09:56:11 Presiding Officer David Bedey
09:56:32 Dr. Amanda Brown, APA Consulting

Overlapping District Characteristic Adjustment - Continued

09:57:42 Dr. Amanda Brown, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

10:01:54 Commissioner Matt Schreiber
10:03:13 Justin Silverstein, APA Consulting
10:04:33 Vice Presiding Officer Eric Matthews
10:05:45 Presiding Officer David Bedey
10:06:20 Commissioner Martha Potter

Montana's Funding System

10:07:02 Justin Silverstein, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

10:15:03 Commissioner Matt Schreiber
10:16:52 Justin Silverstein, APA Consulting
10:18:06 Presiding Officer David Bedey

Montana's Funding System - Continued

10:22:08 Justin Silverstein, APA Consulting
(See Exhibit 3)

Basic Entitlements

10:24:01 Justin Silverstein, APA Consulting
(See Exhibit 3)

Per Average Number Belonging (ANB): Foundation Figure and Imputed Adjustments

10:29:57 Justin Silverstein, APA Consulting
(See Exhibit 3)

Commission Questions / Discussion

10:32:12 Commissioner Matt Schreiber

Per Average Number Belonging (ANB): Foundation Figure and Imputed Adjustments - Continued

10:33:51 Justin Silverstein, APA Consulting
(See Exhibit 3)

10:35:00 **Recessed**

10:46:59 **Reconvened**

10:46:59 Supt. Susie Hedalen left the meeting.

SCHOOL FACILITIES

Major Maintenance Program Recap

10:47:13 Pad McCracken, Lead Staff, Legislative Services Division (LSD)

[EXHIBIT 4](#)

[EXHIBIT 5](#)

Commission Questions / Discussion

10:55:21 Commissioner Tim Tharp
10:55:56 Pad McCracken, LSD

Major Maintenance Program Recap - Continued

10:56:27 Pad McCracken, LSD
(See Exhibit 4)

Intercap Loans - Overview and Usage Trends

10:57:59 Dan Villa, Executive Director, Montana Board of Investments (MBOI)
(See Exhibit 5)

Commission Questions / Discussion

11:04:48 Sen. Becky Beard
11:05:37 Dan Villa, MBOI
11:06:01 Commissioner Matt Schreiber
11:06:52 Dan Villa, MBOI
11:12:00 Rep. Luke Muszkiewicz
11:13:13 Dan Villa, MBOI
11:15:49 Commissioner Mike Waterman
11:16:04 Dan Villa, MBOI
11:17:24 Presiding Officer David Bedey
11:17:45 Dan Villa, MBOI

Modernization & Risk Analysis (MARA) Work and Possible School Funding Interim Commission (SFIC) Interplay

11:18:05 Joe Triem, Deputy Fiscal Analyst, Legislative Fiscal Division (LFD)

Commission Questions / Discussion

11:27:35 Commissioner Tom Burnett
11:28:03 Joe Triem, LFD
11:29:33 Presiding Officer David Bedey
11:29:42 Joe Triem, LFD
11:37:03 Rep. Lee Deming
11:37:39 Presiding Officer David Bedey
11:38:02 Joe Triem, LFD
11:40:41 Commissioner Martha Potter
11:43:03 Presiding Officer David Bedey
11:43:14 Commissioner Mike Waterman

Public Comment

11:44:40 Tina Boone, Executive Director, Montana School Counselor Association (MSCA)
[EXHIBIT 6](#)
11:50:00 Tamara Fisher Alley

11:52:03 **Recessed**
13:00:36 **Reconvened**

PHASE I FOLLOW-UP

Latest Learnings from National Center for Education and the Economy (NCEE)

13:03:05 Janice Case, Regional Director - West, NCEE

[EXHIBIT 7](#)

Commission Questions / Discussion

13:21:17 Commissioner Tom Burnett
13:21:33 Janice Case, NCEE
13:22:15 Matt Bachand, Senior Designer, NCEE
13:23:25 Commissioner Matt Schrebier
13:25:21 Janice Case, NCEE
13:29:43 Presiding Officer David Bedey
13:30:33 Janice Case, NCEE
13:31:41 Commissioner Matt Schreiber
13:33:19 Janice Case, NCEE
13:34:38 Matt Bachand, Senior Designer, NCEE
13:36:37 Commissioner Martha Potter
13:37:14 Janice Case, NCEE
13:37:58 Sen. Becky Beard

Latest Learnings from NCEE - Continued

13:39:08 Janice Case, NCEE
(See Exhibit 7)

Commission Questions / Discussion

13:49:55 Vice Presiding Officer Eric Matthews
13:50:34 Janice Case, NCEE
13:54:01 Supt. Susie Hedalen re-joined the meeting.
13:51:56 Commissioner Matt Schreiber
13:53:16 Vice Presiding Officer Eric Matthews
13:55:28 Commissioner Tim Tharp
13:56:51 Sen. Sara Novak
13:59:19 Commissioner Martha Potter
13:59:52 Janice Case, NCEE
14:01:50 Rep. Melissa Romano
14:02:40 Commissioner Tom Burnett
14:02:58 Matt Bachand, NCEE
14:05:25 Janice Case, NCEE

14:05:59 Supt. Susie Hedalen
14:10:57 Vice Presiding Officer Eric Matthews
14:11:43 Commissioner Matt Schreiber
14:13:08 Presiding Officer David Bedey
14:15:00 Commissioner Martha Potter
14:16:01 Janice Case, NCEE
14:18:28 Matt Bachand, NCEE
14:21:06 Presiding Officer David Bedey

Phase I recommendations and alignment with Phase II work and the funding formula

14:22:11 Matt Bachand, NCEE
(See Exhibit 7)

Commission Questions / Discussion

14:31:34 Commissioner Matt Schreiber
14:32:43 Matt Bachand, NCEE
14:35:36 Sen. Becky Beard
14:36:42 Supt. Susie Hedalen
14:38:20 Sen. Sara Novak
14:39:30 Sen. Becky Beard
14:39:57 Presiding Officer David Bedey

Phase I Recommendations and Alignment with Phase II Work and the Funding Formula - Continued

14:40:31 Matt Bachand, NCEE
(See Exhibit 7)

Commission Questions / Discussion

14:45:02 Supt. Susie Hedalen

Phase I Recommendations and Alignment with Phase II Work and the Funding Formula - Continued

14:46:34 Matt Bachand, NCEE
(See Exhibit 7)

14:47:33 Janice Case, NCEE

Commission Questions / Discussion

14:55:54 Commissioner Martha Potter
14:56:18 Janice Case, NCEE

Phase I Recommendations and Alignment with Phase II Work and the Funding Formula - Continued

14:57:38 Matt Bachand, NCEE
(See Exhibit 7)

15:04:11 Janice Case, NCEE
(see Exhibit 7)

Commission Questions / Discussion

15:16:06 Presiding Officer David Bedey

15:16:47 **Recessed**

15:31:02 **Reconvened**

SCHOOL FUNDING VARIOUS TOPICS

School District Characteristics

15:31:07 Julia Pattin, Fiscal Staff, Legislative Fiscal Division (LFD)

[EXHIBIT 8](#)

Commission Questions / Discussion

15:37:10 Sen. Sue Vinton

15:37:21 Julia Pattin, LFD

15:37:50 Pad McCracken, Lead Staff, LSD

15:38:22 Sen. Forrest Mandeville

15:38:53 Julia Pattin, LFD

15:39:25 Commissioner Martha Potter

15:39:53 Julia Pattin, LFD

15:41:28 Commissioner Matt Schreiber

15:43:15 Julia Pattin, LFD

15:44:07 Presiding Officer David Bedey

School District Characteristics - Continued

15:44:28 Julia Pattin, LFD

(See Exhibit 8)

Commission Questions / Discussion

15:46:25 Commissioner Tim Tharp

15:47:13 Commissioner Martha Potter

15:47:53 Julia Pattin, LFD

15:49:59 Supt. Susie Hedalen

District At-BASE and Over-MAX

15:51:10 Julia Pattin, LFD
(See Exhibit 8)

Commission Questions / Discussion

15:54:54 Presiding Officer David Bedey
15:55:07 Julia Pattin, LFD
15:56:03 Commissioner Matt Schreiber

District At-BASE and Over-MAX - Continued

15:56:34 Julia Pattin, LFD
(See Exhibit 8)

Commission Questions / Discussion

15:57:57 Commissioner Matt Schreiber
15:58:20 Julia Pattin, LFD
16:00:45 Commissioner Mike Waterman
16:02:13 Presiding Officer David Bedey

Distance and School Isolation / Non-Isolation

16:03:56 Pad McCracken, LSD
(See Exhibit 8)

Commission Questions / Discussion

16:05:46 Sen. Sara Novak
16:06:59 Pad McCracken, LSD

Distance and School Isolation / Non-Isolation - Continued

16:07:43 Pad McCracken, LSD
(See Exhibit 8)

Commission Questions / Discussion

16:11:23 Commissioner Matt Schreiber

Distance and School Isolation / Non-Isolation - Continued

16:13:27 Pad McCracken, LSD
(See Exhibit 8)

Commission Questions / Discussion

16:16:25 Sen. Becky Beard
16:16:51 Pad McCracken, LSD

16:18:18 Rep. Brad Barker
16:18:53 Commissioner Tim Tharp
16:20:14 Presiding Officer David Bedey
16:21:31 Commissioner Martha Potter
16:22:08 Pad McCracken, LSD

Distance and School Isolation / Non-Isolation - Continued

16:22:47 Pad McCracken, LSD
(See Exhibit 8)

Commission Questions / Discussion

16:24:26 Rep. Brad Barker
16:25:53 Commissioner Tim Tharp
16:26:42 Commissioner Mike Waterman
16:29:40 Sen. Becky Beard
16:30:49 Commissioner Martha Potter

Distance and School Isolation / Non-Isolation - Continued

16:32:31 Kate Johnson, Fiscal Staff, LFD

Commission Questions / Discussion

16:34:52 Commissioner Matt Schreiber

Distance and School Isolation / Non-Isolation - Continued

16:36:45 Kate Johnson, LFD
(see Exhibit 8)

Modeling the Increment & the Decrement

16:42:33 Julia Pattin, LFD
(See Exhibit 8)

Commission Questions / Discussion

16:50:31 Commissioner Tom Burnett
16:50:40 Julia Pattin, LFD
16:51:25 Presiding Officer David Bedey

Public Comment

16:52:55 Bob Story, Montana Taxpayers Association
16:55:52 Matt Driessen, Superintendent, DeSmet Elementary, Missoula
[EXHIBIT 9](#)
17:59:59 Sarah Froehlke, Zero to Five Montana

17:02:08 Gary Lusin
[EXHIBIT 10](#)
17:15:04 Jane Shawn
17:17:26 Erica McMillin, School Employee, Helena
17:19:24 Leighann Wilson, Paraprofessional, Helena
17:23:18 Jaret Stump, Teacher, Glacier High School, Kalispell

ADJOURNMENT

Adjournment: 17:29:07