

# K-12 Funding Follow-Ups (Various Topics)

School Funding Interim Commission

April 7<sup>th</sup> and 8<sup>th</sup>, 2026

Prepared by

Pad McCracken, LSD

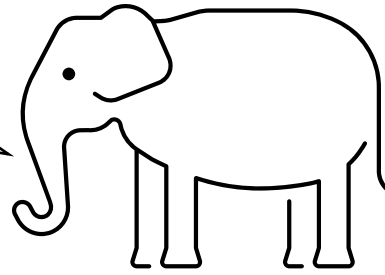
Julia Pattin, LFD

Becca Brown, LSD

Kate Johnson, LFD



Let's learn  
about school  
funding!



Today's school funding training will be a *smorgasbord* of various topics:

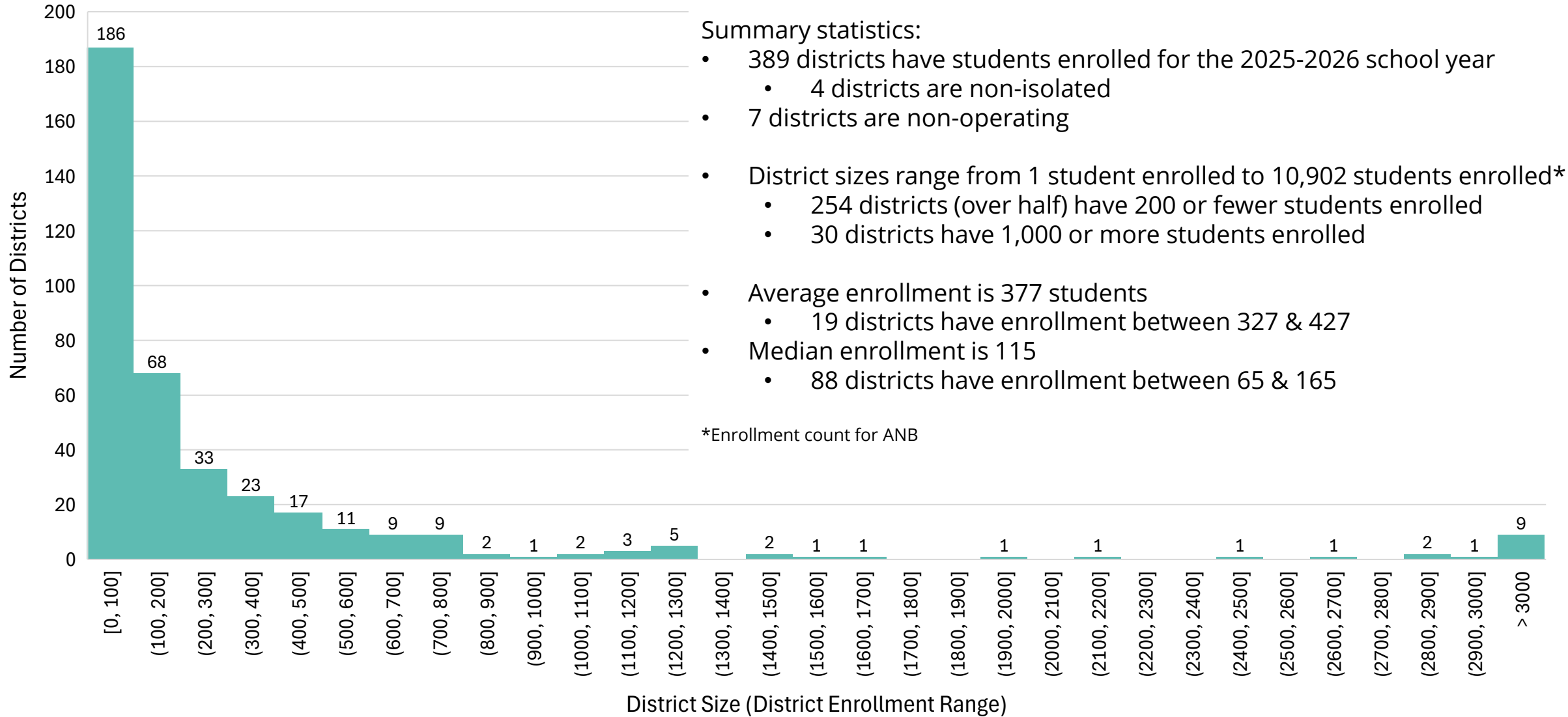
- **School district characteristics:**
  - **Distribution of districts by size**
  - **Districts at-BASE, over-MAX, and trend**
  - **Isolated and non-isolated districts**
    - **Existing mechanisms related to school isolation/non-isolation**
- **Modeling of the elimination of per-ANB entitlement decrement and/or elimination of basic entitlement increments**
- **Update to the 2015 Special Education expenditures graphic**
- **Mental health longitudinal data**

Let us know what more your appetite requires, and we'll bring more to the table next time!

# **School District Characteristics**



# Histogram of Enrollment for FY 2026

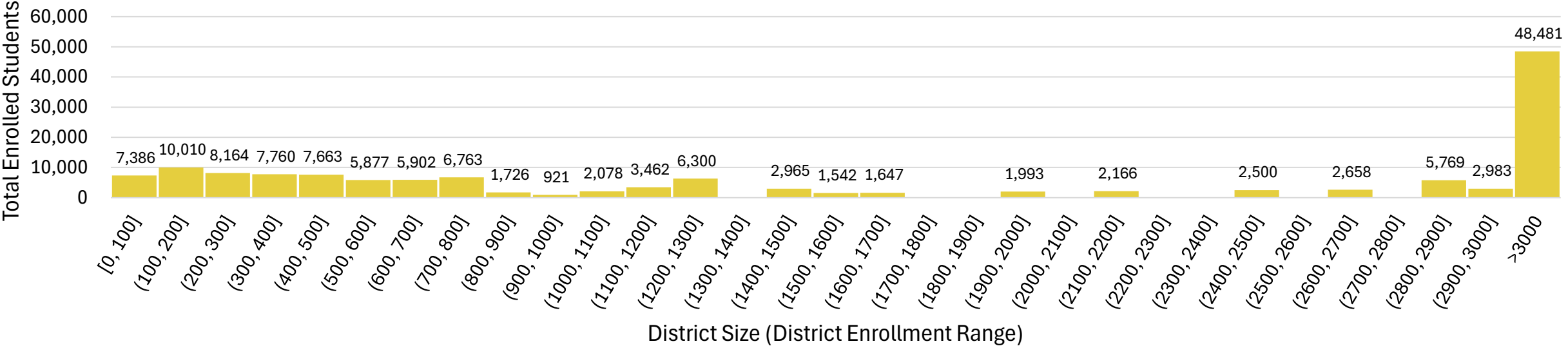
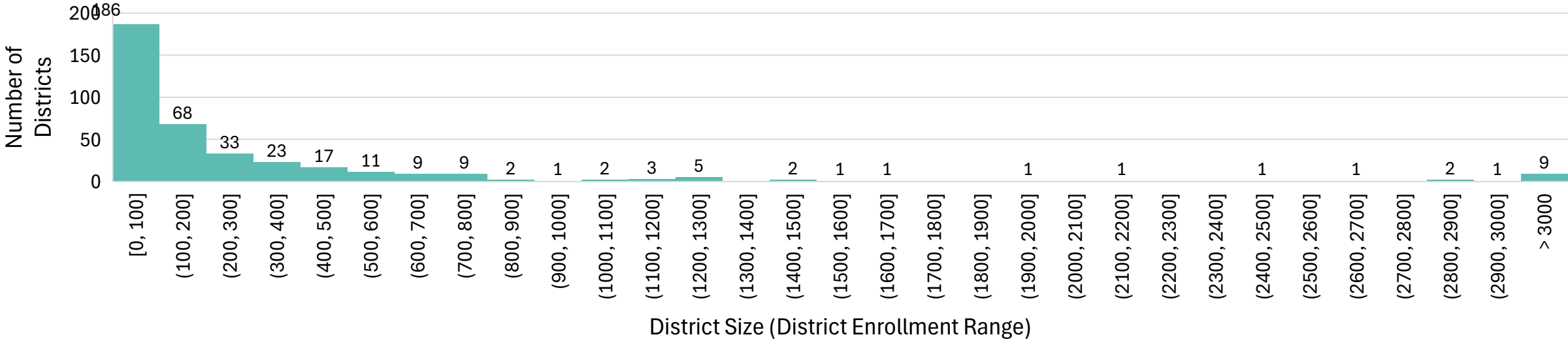


## Summary statistics:

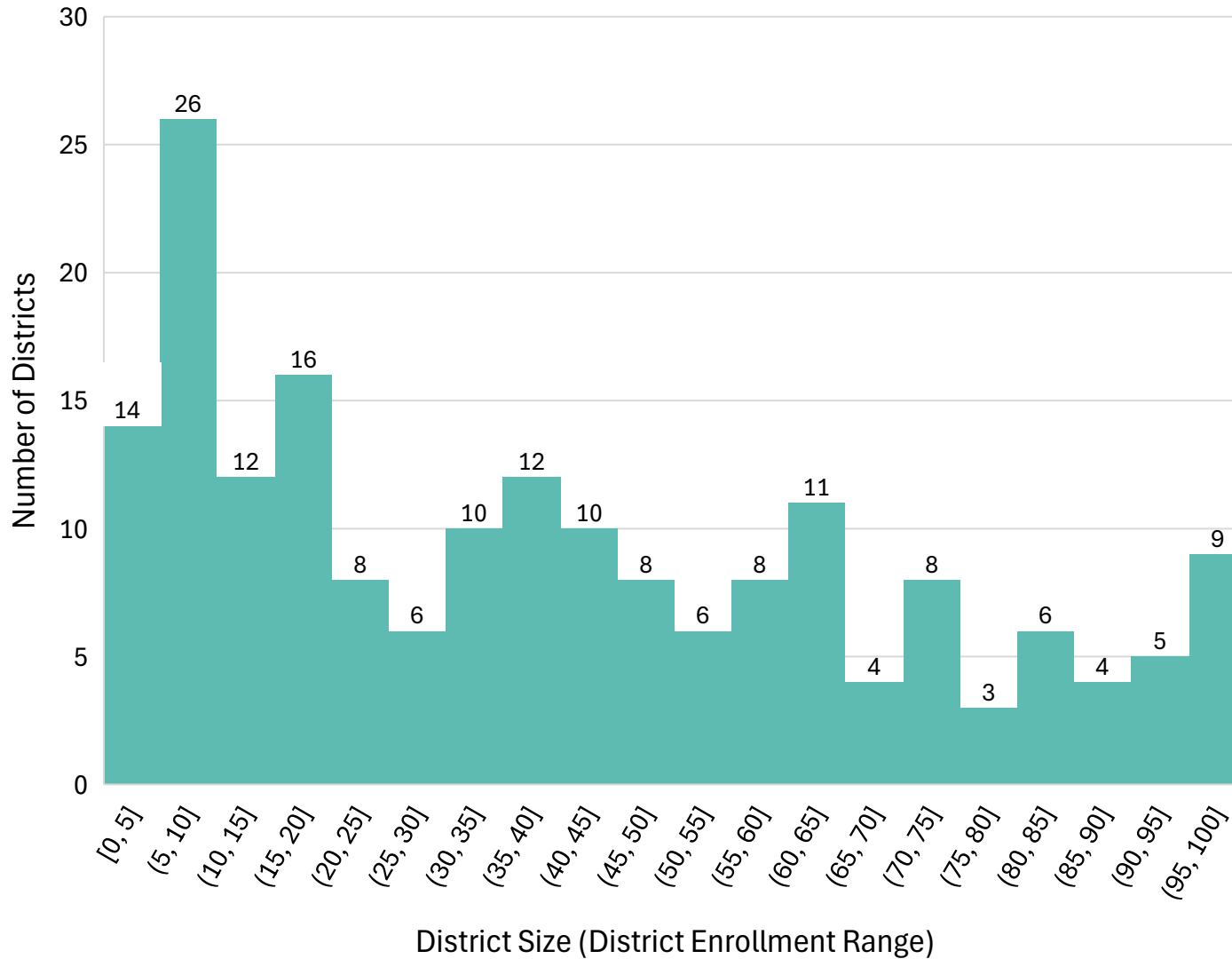
- 389 districts have students enrolled for the 2025-2026 school year
  - 4 districts are non-isolated
- 7 districts are non-operating
- District sizes range from 1 student enrolled to 10,902 students enrolled\*
  - 254 districts (over half) have 200 or fewer students enrolled
  - 30 districts have 1,000 or more students enrolled
- Average enrollment is 377 students
  - 19 districts have enrollment between 327 & 427
- Median enrollment is 115
  - 88 districts have enrollment between 65 & 165

\*Enrollment count for ANB

The 9 largest districts have 33.0% of the state's enrollment; roughly the same percentage is educated in the smallest 341 districts.

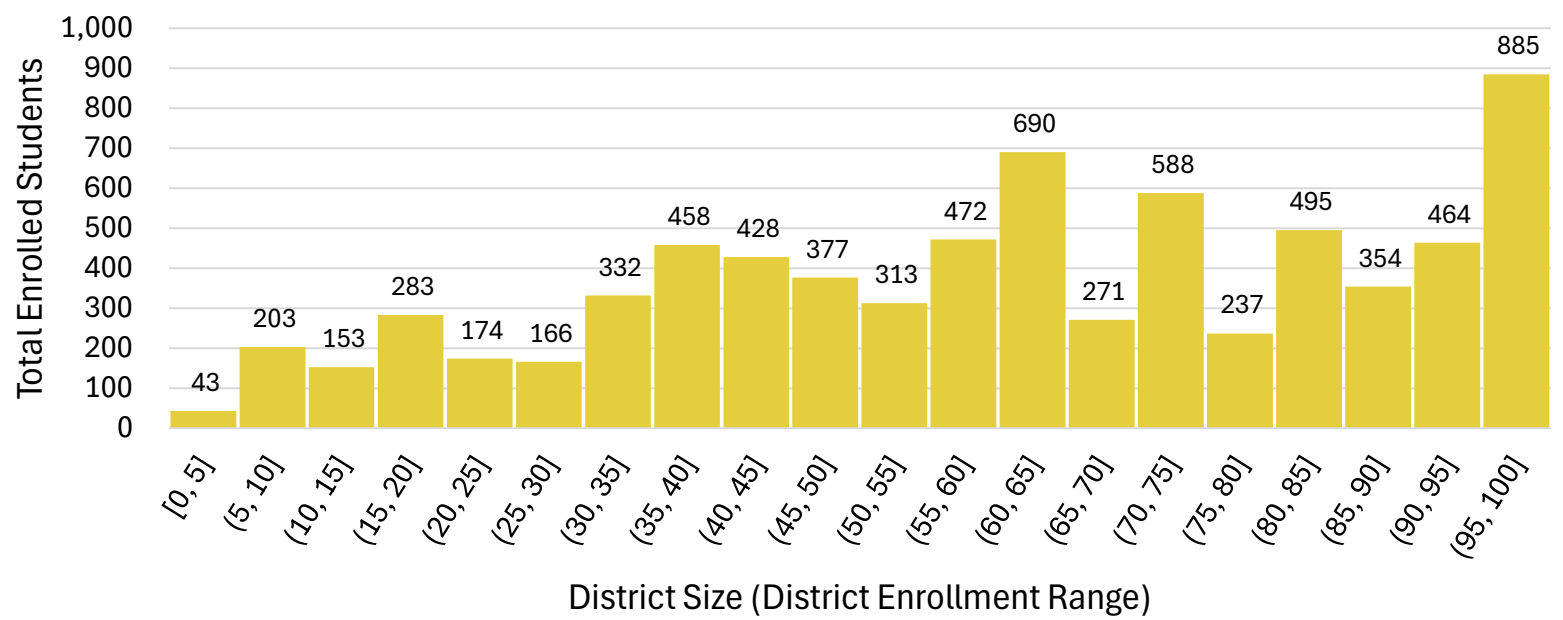
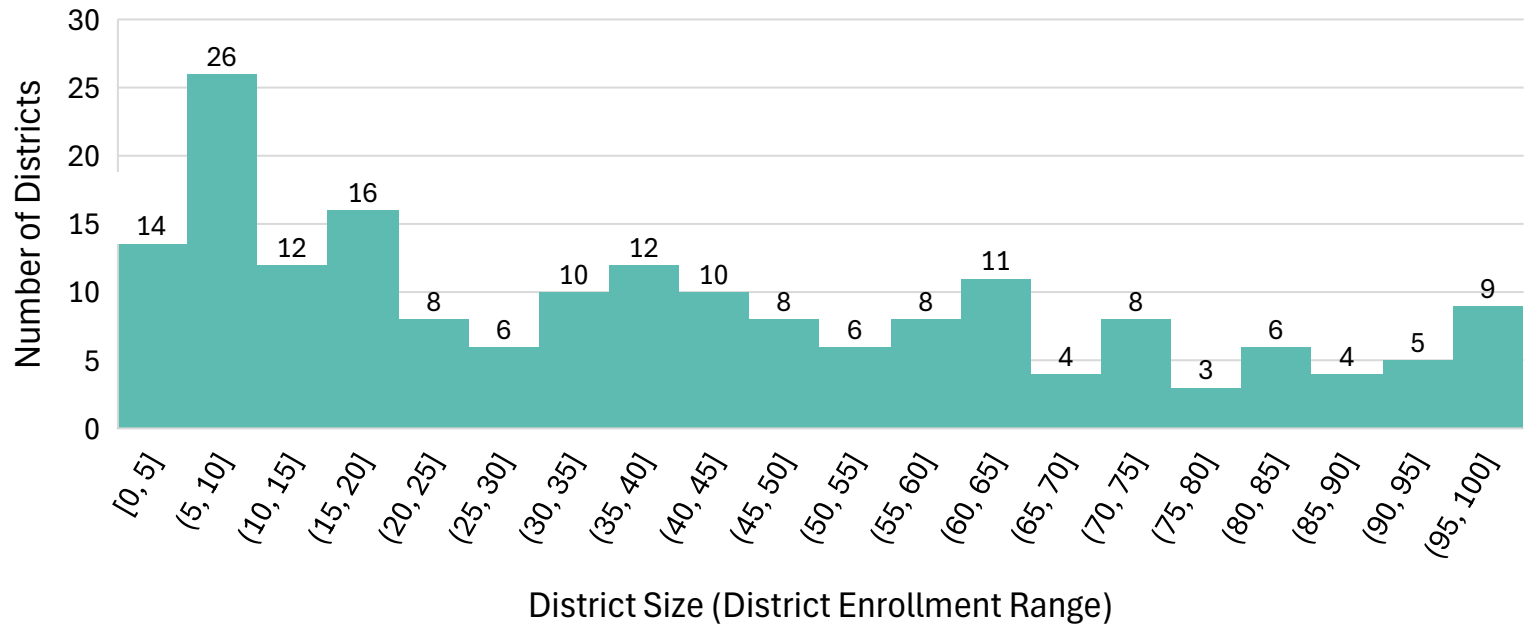


# Histogram of Enrollment ( $\leq 100$ ) for FY 2026



## Summary statistics:

- 40 districts had 10 or fewer students enrolled
- 186 districts had 100 or fewer students enrolled



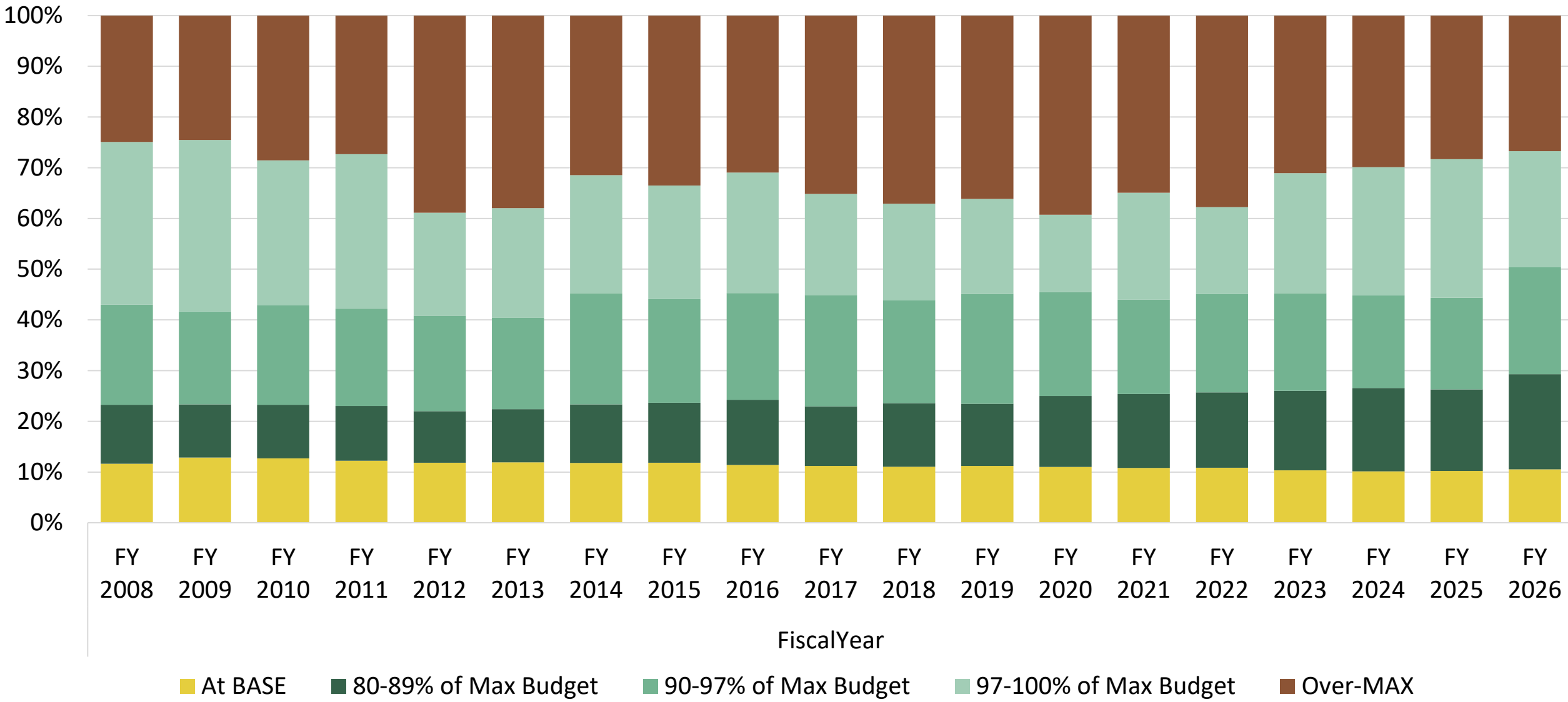
The largest district in the state by itself has 10,902 students or 7.4% of the state's total enrollment; roughly the same percentage is educated in the smallest 215 districts.

The smallest 186 districts (districts with  $\leq 100$  students) educate 7,386 students or 5.0% of the state's total enrollment.

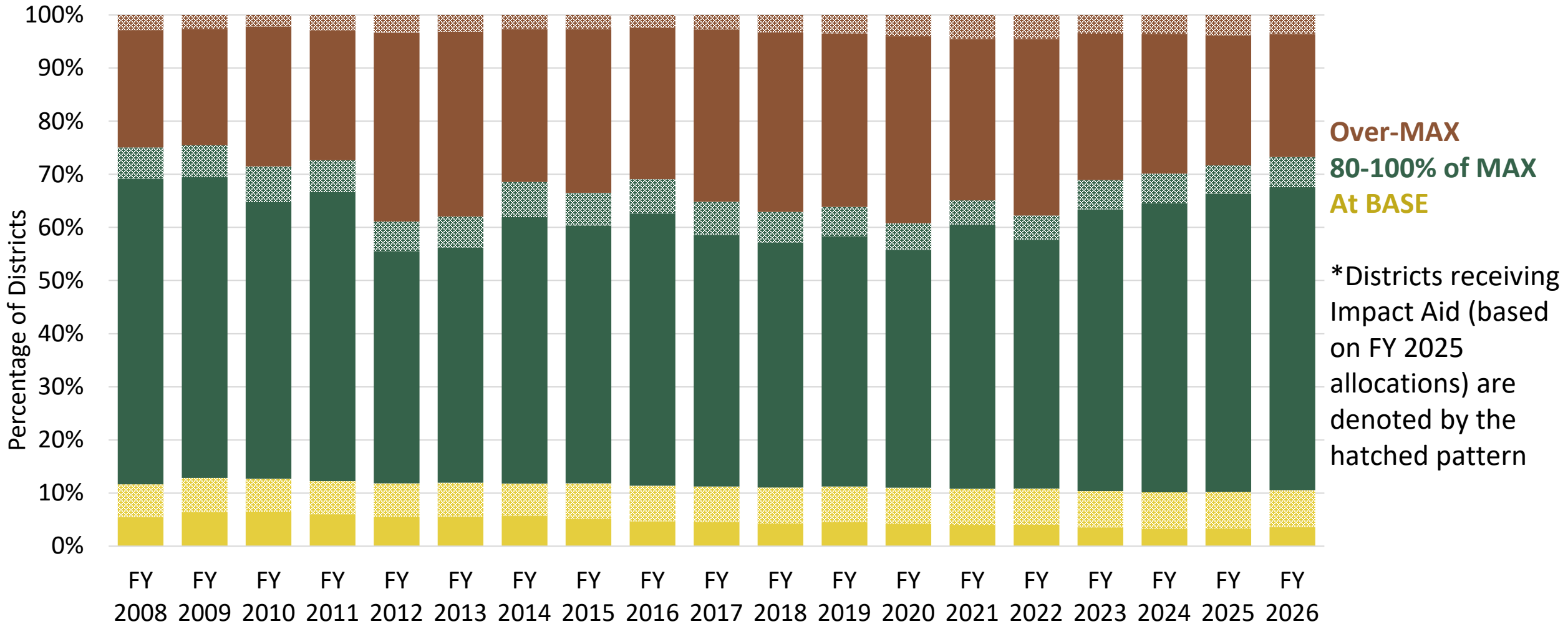


# **Districts At-BASE and Over-MAX**

# Adopted Budget Levels - Percentage of Districts



# Not all districts with adopted budgets at BASE receive Impact Aid\*, and not all districts that receive Impact Aid operate at BASE.



# Count of Districts by Budget Level

Adopted Budget as a Percentage of MAX Budget	Number of Districts FY 2008	Number of Districts FY 2026	Difference
At BASE	49	41	(8)
80 – 89% of MAX	49	73	24
90 – 97% of MAX	83	82	(1)
97 – 100% of MAX	135	89	(46)
Over-MAX	105	104	(1)
<b>TOTAL</b>	<b>421</b>	<b>389</b>	<b>(32)</b>

# Over-MAX Districts

Adopted Budget as a Percentage of MAX Budget	Number of Districts FY 2008*	Number of Districts FY 2026*	Difference
100 – 105% of MAX	47	56	9
105 – 110% of MAX	20	23	3
110 – 115% of MAX	6	12	6
115 – 120% of MAX	7	5	(2)
>120% of MAX	12	8	(4)
<b>TOTAL</b>	<b>92</b>	<b>104</b>	<b>12</b>

\*The districts that were over-MAX in FY 2008 are not necessarily the districts that are over-MAX in FY 2026, although there is some overlap.



**Distance and  
School  
Isolation/  
Non-isolation**

# Current Mechanisms for School Isolation and District Non-isolation

2005

As a result of comparing the state of Montana with other selected states the overall policy observation was offered as to the conclusion that the state of Montana faces a series of fiscal challenges if it is to fund a quality education. These fiscal challenges are exacerbated given the number of small schools and small school districts and the necessary state and local funding to meet the legislative mandates of a quality education. The critical element is to identify isolated schools and school districts as opposed to simply funding all small schools and school districts. Thus, this essential policy issue must be addressed in understanding the distinctions between small isolated schools and school districts from that of simply small schools and school districts.

[Determining the Cost of Providing an Adequate Education in the State of Montana](#) - R.C. Wood & Associates Final Report to QSIC (2005)

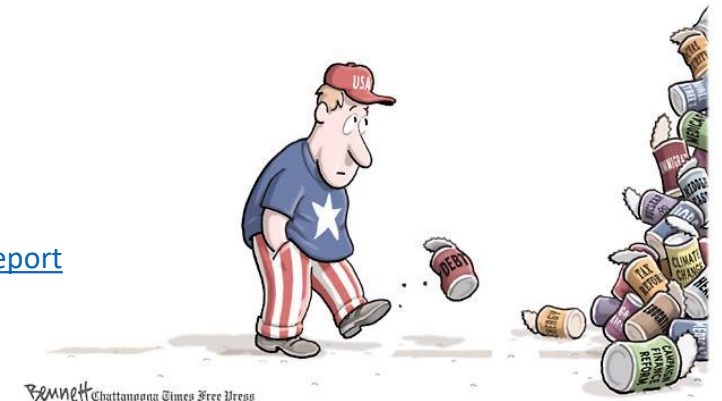


Kicking the can down the road:

2016

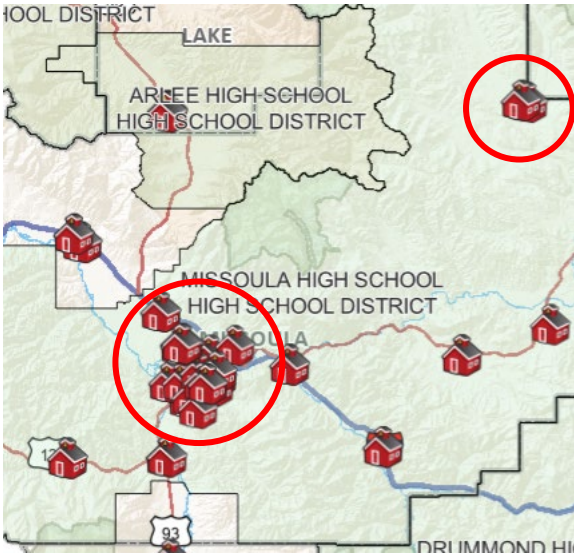
1. Further study is needed to develop a definition of "isolated and necessary school" based on geography and travel time. This definition can then be used to ensure identified schools have sufficient financial capability, perhaps through additional state support or budgetary flexibility, in order to guarantee the equality of educational opportunity.

Findings and recommendation in the [2015-16 SFIC Final Report](#) related to District Size, Structure, and Equity



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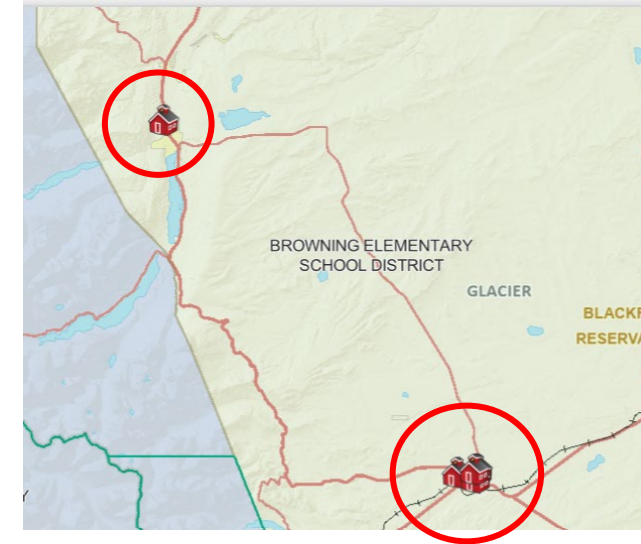
# Separate Budget Unit – Geographic Isolation



County: 18 Glacier  
 District: 0400 Browning Elem

NOTE: Information shown on the asterisked lines below (\*) is subject to change if your district's certified ANB is changed; any changes will be reflected on the FY2027 final budget form. (+) This symbol indicates whether the current ANB or 3 year average ANB (whichever is greater) is used to determine budget funding. Information shown on the asterisked line below (\*\*) means that if a District qualifies for the Teacher Incentive Program, payment is doubled.

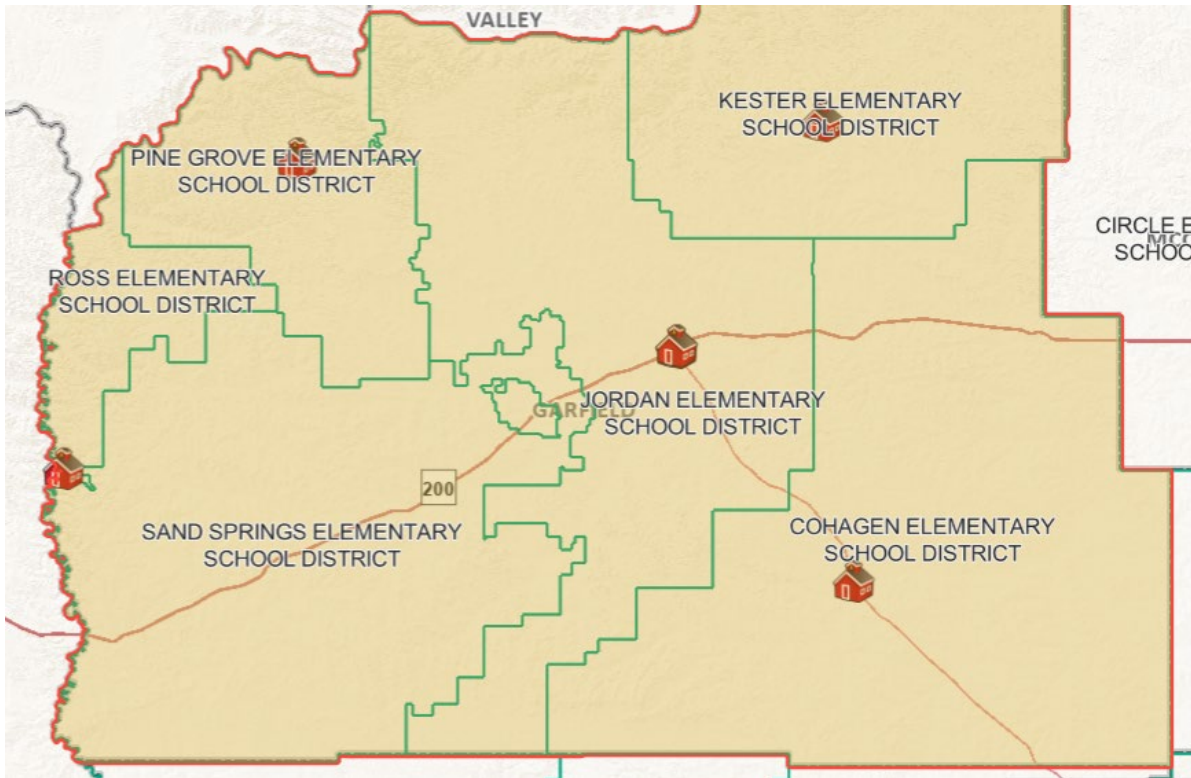
1. Certified ANB		FY 2027			3 Year Avg ANB		
*Budget Unit	ANB	*Basic Entitlement	*Per ANB Entitlement	ANB	*Basic Entitlement	*Per ANB Entitlement	
E1 BROWNING K-6	1,044	159,522.00	6,876,712.80	1,049	159,522.00	6,909,168.80 +	
E2 BABB K-8	23	62,554.00	153,842.40	21	62,554.00	140,469.00 +	
MI BROWNING 7-8	258	125,110.00	2,193,709.50	265	125,110.00	2,252,765.00 +	



## Additional funding provided for “remote” school of a district

“Separate budget unit” ([20-9-311\(7\)](#))—when a school of a district is more than 20 miles from an incorporated town or from another school of the district, or the SPI approves separate budget status because of “unusual hardship” related to geography/transportation, that school’s ANB is calculated separately from the other schools of the district and the district “receives” an additional basic entitlement. In FY 2026 there are eight districts with nine schools that qualify as additional “separate budget units” due to geography (e.g. Missoula HS District and Seeley-Swan HS; Browning EL District and Baab School). Six of these nine schools are remote schools located on Hutterite colonies. Remember that public charter schools that meet enrollment thresholds also receive separate budget unit status.

# Separate Budget Unit – Geographic Isolation



If Montana’s separate budget unit mechanism is our way of distributing more money to isolated and necessary schools within a district, Garfield County provides a good illustration of how it could work. Currently, six “feeder” elementary districts flow into the Garfield County High School District.

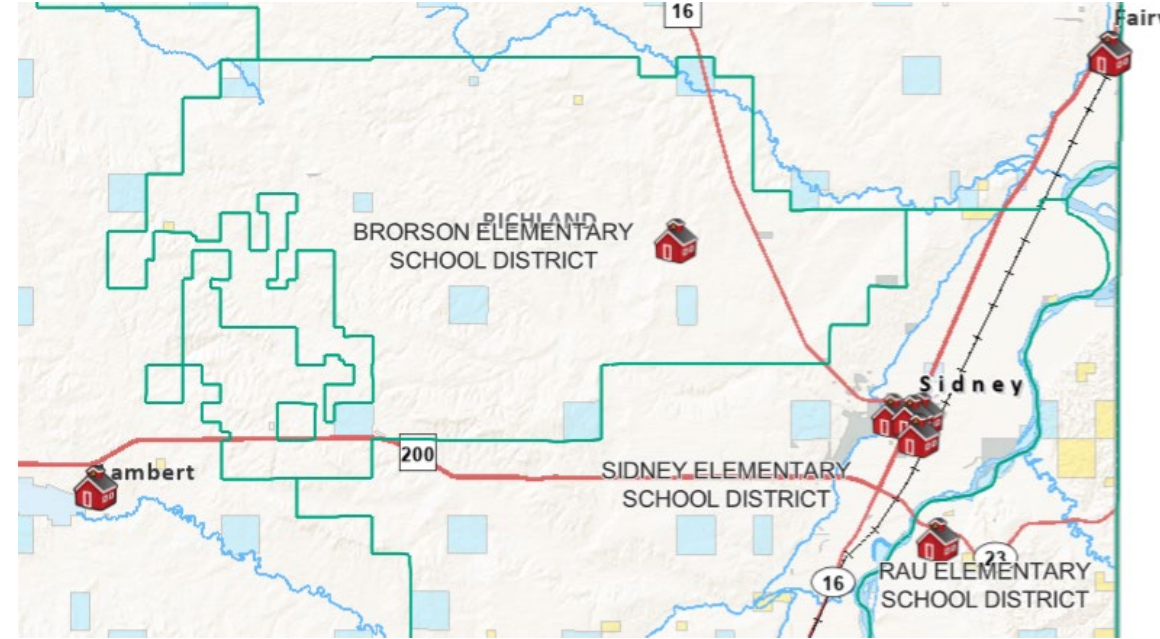
Through the separate budget unit mechanism, each existing elementary school in Garfield County would continue to generate an additional basic entitlement if the entire county consolidated into one K-12 district.

But it is worth considering the impacts of other school funding mechanisms. One that comes to mind is major maintenance aid with its fixed-amount-per-district component. Consolidation to a K-12 would mean a smaller total “box” to support maintaining the schools of Garfield County.

# Non-isolated Status

“Non-isolated” status ([20-9-302](#) and [20-9-303](#))—when an EL school has 9 or fewer ANB for two consecutive years and has not been approved as “isolated” by the county commissioners and the Superintendent of Public Instruction (SPI) based on geographic and transportation criteria, the state provides 50% of the normal direct state aid (DSA) and the district must levy for the other 50%. In FY 2026 there were 4 schools/districts in non-isolated status which paid a total of \$95,000 in the non-isolated local share of DSA. Each of these is a single-school district.

There is no similar funding mechanism for non-isolated high schools/districts, but they are still required to apply for isolation status if they have fewer than 25 ANB. There are currently 20 high schools with fewer than 25 ANB.



CONAME	LE NAME	ANB Total	FTE	NONISOMILLS	EL BASE MILLS	MILLV	MILLS GF
Gallatin	Malmborg Elem	9	2	8.54	13.40	3,119.00	25.63
Richland	Brorson Elem	7	3.225	4.55	6.93	5,222.00	11.48
Blaine	North Harlem Colony Elem	7	2.19	190.54	18.07	125.00	208.61
Lake	Swan Lake-Salmon Elem	5	2	5.48	6.08	3,799.00	14.43

# School Districts and Distance to Nearest Neighbor

## Methodology for preliminary analysis

- Measures distance from each district in the state to its nearest neighboring district
- **Nearest neighboring district** is calculated as the distance from a district to its closest neighboring district that serves the same grades of students
  - The nearest neighboring district to an elementary district is the closest elementary or K-12 district, but not a high school district
  - The nearest neighboring district to a K-12 district is only the closest K-12 district

## Data considerations

- District location may be the district's administrative office, which may not reflect the location of a school building
- Distance is calculated in both **linear miles** and **road miles**
  - Linear miles: straight-line distance between two points (also known as Euclidean distance or "as the crow flies")
  - Road miles: distance traveled on the road network from one point to another
  - Focusing on the road miles calculations for this preliminary analysis

# School Districts and Distance to Nearest Neighbor

## Linear miles vs. road miles

The calculated linear miles and calculated road miles distance between two points often differ

Average Difference Between Linear Miles Calculated and Road Miles Calculated	
Distance Calculated	Average Difference in Miles Calculated
Districts <5 Miles from Nearest Neighbor District	0.59
Districts 5-9.99 Miles from Nearest Neighbor District	1.43
Districts 10-14.99 Miles from Nearest Neighbor District	1.80
Districts 15-19.99 Miles from Nearest Neighbor District	2.54
Districts >=20 Miles from Nearest Neighbor District	10.06

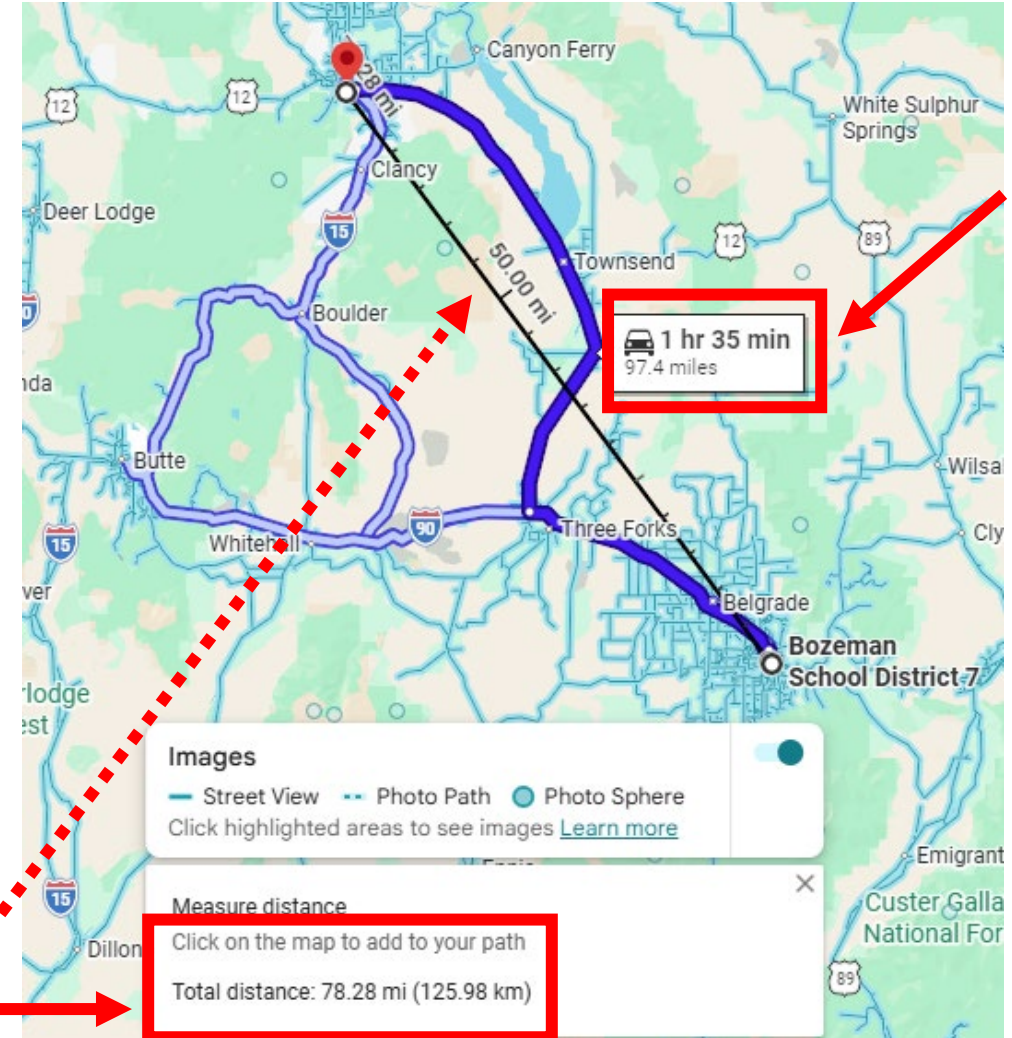
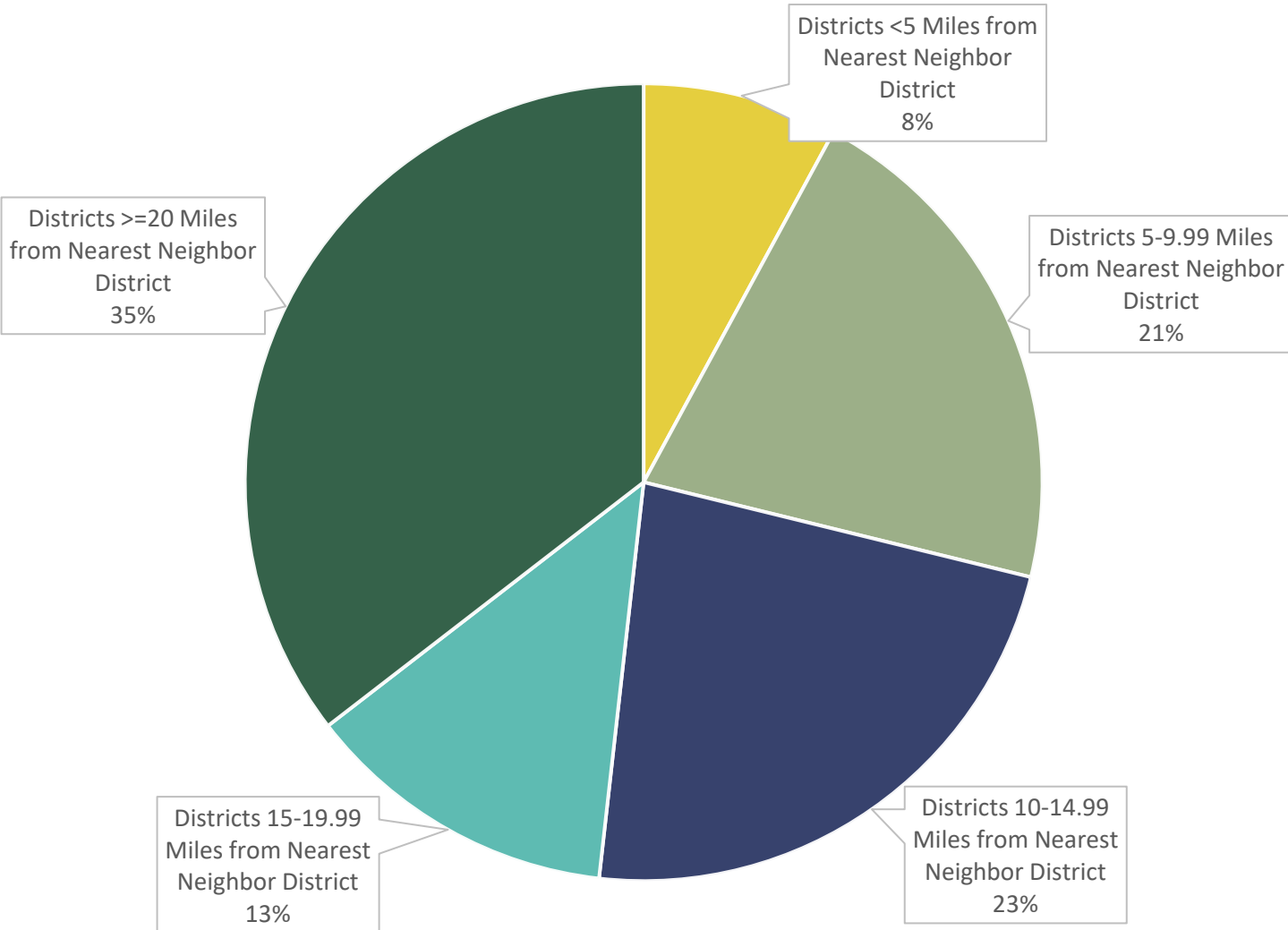


Image: Google Maps

# School Districts and Distance to Nearest Neighbor



Preliminary summary statistics\*:

- Approximately 8% of districts are less than 5 road miles from their nearest neighboring district
  - Median district ANB (FY 2025): 234
  - All except one of these districts are elementary school districts
- Approximately 21% of districts are 5-10 road miles from their nearest neighboring district
  - Median district ANB (FY 2025): 213
  - Approximately 79% of these districts are elementary school districts

\*Data on non-operating districts are excluded from preliminary analysis

# School Districts and Distance to Nearest Neighbor

Distance to Nearest Neighbor and ANB		
Distance to Nearest Neighbor (Road Miles)	Median ANB (FY 2025)	Average ANB (FY 2025)
Districts <5 Miles from Nearest Neighbor District	234	1130
Districts 5-9.99 Miles from Nearest Neighbor District	213	556
Districts 10-14.99 Miles from Nearest Neighbor District	118	350
Districts 15-19.99 Miles from Nearest Neighbor District	101	363
Districts >=20 Miles from Nearest Neighbor District	94	515

Median Distance to Nearest Neighbor and ANB by District Type			
District Type	Median Distance: Road Miles	Median Distance: Linear Miles	Median ANB
Elementary School District	11.47	9.56	97
High School District	18.99	16.05	139
K-12 School District	24.45	20.54	177

# Additional Considerations

If the Commission wants to pursue the identification of isolated and necessary schools or districts, there are some additional data points that could be considered:

- Travel time or cost distance between schools and districts
- The percent of resident students attending a neighboring district (for the first time, data on out-of-district attendance is available on a statewide basis; the table below is from a [recent analysis](#) of this data)

Count of Districts and Out of District Attendance Rates, FY 2025		
Districts	Count of Districts	Percent of Districts
Districts with $\geq 50\%$ of resident students attending different district(s)	53	13.4%
Districts with 25-49.99% of resident students attending different district(s)	62	15.6%
Districts with $\geq 50\%$ of total students are residents of other school district(s)	28	7.1%
Districts with 25-49.99% of total students are residents of other school district(s)	68	17.1%

# Modeling the Increment & the Decrement



# Basic Entitlement

Data inputs:

- ✓ Budget limit ANB (see ANB slide for data inputs for that calculation)
- ✓ Number of budget units
- ✓ District type (elementary, high school, K-12; accredited/non-accredited)

**Elementary districts and K-12 districts for every elementary budget unit:**

**Basic Entitlement**

=

\$60,732 for  
FY 2026  
Rate set in 20-9-306,  
MCA

For districts  
with ≤ 250 ANB

OR

\$60,732 for  
FY 2026  
Rate set in 20-9-306,  
MCA

+

\$3,037

For each additional  
25 ANB over 250  
**This is called the  
increment**

For districts  
with > 250 ANB

BE "increments" example – Helena EL  
Budget Unit E1 (excludes charters)

4,085 ANB  
 $4,085 - 250 = 3,835$   
 $3,835 \div 25 = 153$  increments

So, Helena EL BE =  
 $\$60,732 + (\$3,037 \times 153) =$   
 $\$525,393$  or just under 9 full BEs;  
Helena has 10 elementary schools

The BE increment provides Helena EL  
Budget Unit E1 an additional \$465,000.

# Basic Entitlement

Data inputs:

- ✓ Budget limit ANB (see ANB slide for data inputs for that calculation)
- ✓ Number of budget units
- ✓ District type (elementary, high school, K-12; accredited/non-accredited)

**Elementary districts and K-12 districts for every approved and accredited middle school budget unit:**

**Basic Entitlement**

=

\$121,466 for  
FY 2026  
Rate set in 20-9-306,  
MCA

For districts  
with ≤ 450 ANB

**OR**

\$121,466 for  
FY 2026  
Rate set in 20-9-306,  
MCA

+

\$6,073

For each additional  
45 ANB over 450  
**This is called the  
increment**

For districts  
with > 450 ANB

# Basic Entitlement

Data inputs:

- ✓ Budget limit ANB (see ANB slide for data inputs for that calculation)
- ✓ Number of budget units
- ✓ District type (elementary, high school, K-12; accredited/non-accredited)

## High school districts for every budget unit:

**Basic  
Entitlement**

=

\$364,401 for  
FY 2026  
Rate set in 20-9-306,  
MCA

For districts  
with ≤ 800 ANB

OR

\$364,401 for  
FY 2026  
Rate set in 20-9-306,  
MCA

+

\$18,221

For each additional  
80 ANB over 800  
**This is called the  
increment**

For districts  
with > 800 ANB

# Per-ANB Entitlement

Data inputs:

- ✓ Budget limit ANB (see ANB slide for data inputs for that calculation)
- ✓ Number of budget units
- ✓ District type (elementary, high school, K-12; accredited/non-accredited)

**Elementary districts, K-12 district elementary school programs, and for grades 7 & 8 for every non-approved/accredited middle school budget unit:**

**Per-ANB Entitlement** =

+	\$6,496 for FY 2026 Rate set in 20-9-306, MCA	=	For the 1 <sup>st</sup> ANB
+	\$6,496 for FY 2026 Rate set in 20-9-306, MCA	-	20¢ <i>This is called the decrement</i>
+	\$6,496 for FY 2026 Rate set in 20-9-306, MCA	-	20¢ × 2
	⋮		⋮
+	\$6,496 for FY 2026 Rate set in 20-9-306, MCA	-	20¢ × 998
+	\$6,496 for FY 2026 Rate set in 20-9-306, MCA	-	20¢ × 999

For the 1000<sup>th</sup> ANB and any ANB over 1000

Decrement example – Helena EL Budget Unit E1 (excludes charters)

No decrement:  
4,085 ANB x \$6,496 = \$26.5 M

With decrement = \$25.8 M

The decrement results in Helena EL Budget Unit E1 having its Per-ANB entitlement reduced by about \$700,000.

# Per-ANB Entitlement

Data inputs:

- ✓ Budget limit ANB (see ANB slide for data inputs for that calculation)
- ✓ Number of budget units
- ✓ District type (elementary, high school, K-12; accredited/non-accredited)

**High school districts, K-12 district high school programs, and for grades 7 & 8 for every approved and accredited middle school budget unit:**

**Per-ANB Entitlement** =

+	\$8,317 for FY 2026 Rate set in 20-9-306, MCA	=	For the 1 <sup>st</sup> ANB	
+	\$8,317 for FY 2026 Rate set in 20-9-306, MCA	-	50¢ <i>This is called the decrement</i>	For the 2 <sup>nd</sup> ANB
+	\$8,317 for FY 2026 Rate set in 20-9-306, MCA	-	50¢ × 2	For the 3 <sup>rd</sup> ANB
	⋮		⋮	
+	\$8,317 for FY 2026 Rate set in 20-9-306, MCA	-	50¢ × 798	For the 799 <sup>th</sup> ANB
+	\$8,317 for FY 2026 Rate set in 20-9-306, MCA	-	50¢ × 799	For the 800 <sup>th</sup> ANB and any ANB over 800

# What if both the increment and the decrement were eliminated?

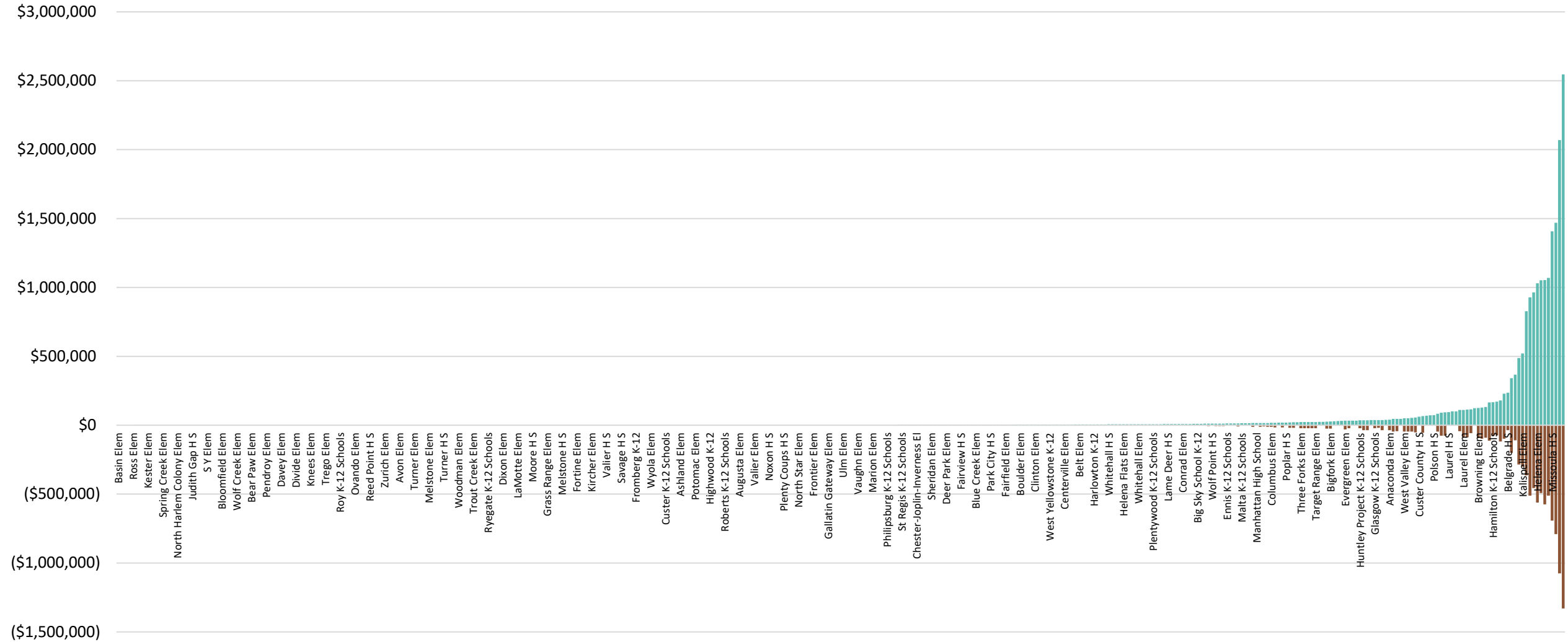
Based on FY 2026 numbers, the basic entitlement would be decreased by a total of \$10.4 million and the per-ANB entitlement would be increased by a total of \$21.2 million.

- This would **increase the MAX budget limit by \$10.8 million**
- This would **increase the BASE budget limit by \$8.6 million** (to be funded with a blend of state and local dollars)
- Direct State Aid (entirely state-funded) would increase by \$4.8 million, and an additional portion of the BASE budget increase would be paid for by Guaranteed Tax Base (GTB) aid

**Only two districts would see net reductions:** one by \$260<sup>00</sup> and the other by \$144<sup>30</sup> (to their BASE budgets)

# What if both the increment and the decrement were eliminated?

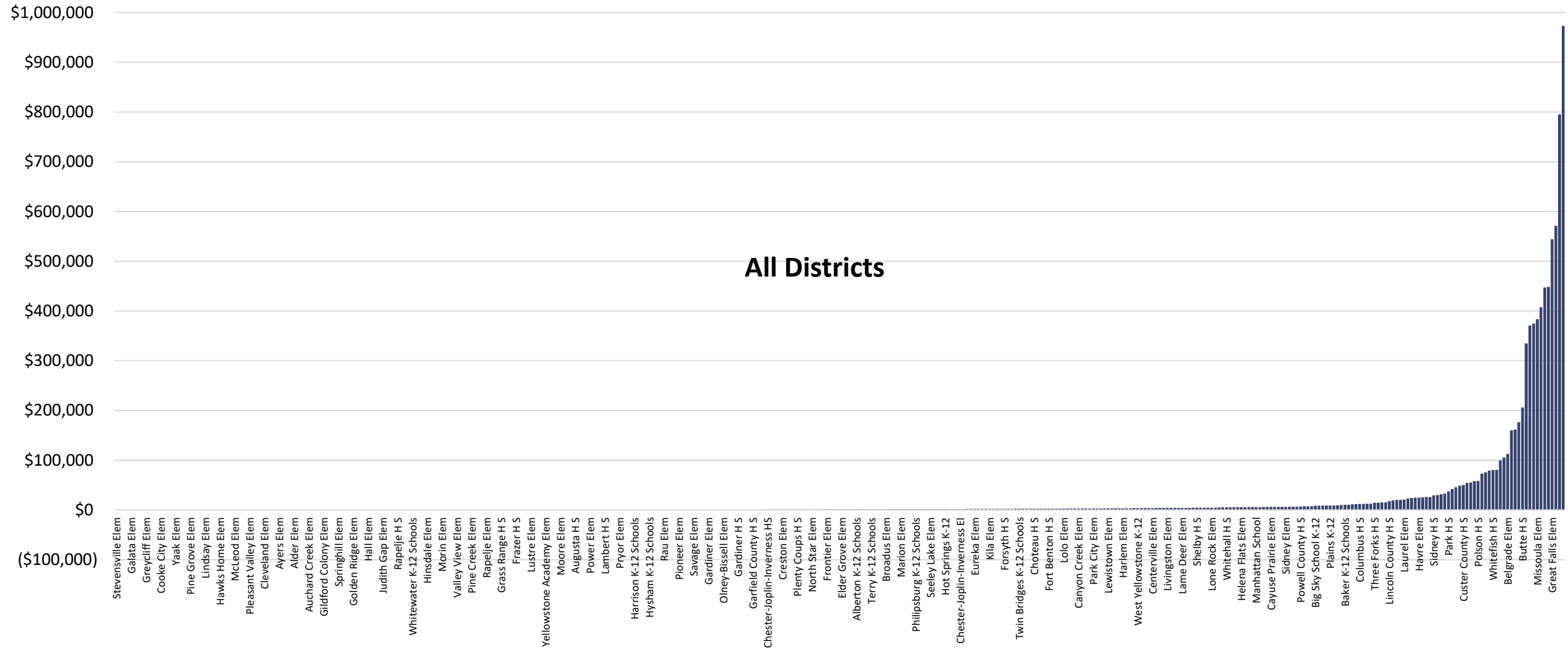
Difference to the BASE Budget from Elimination of the **Decrement** and **Increment**



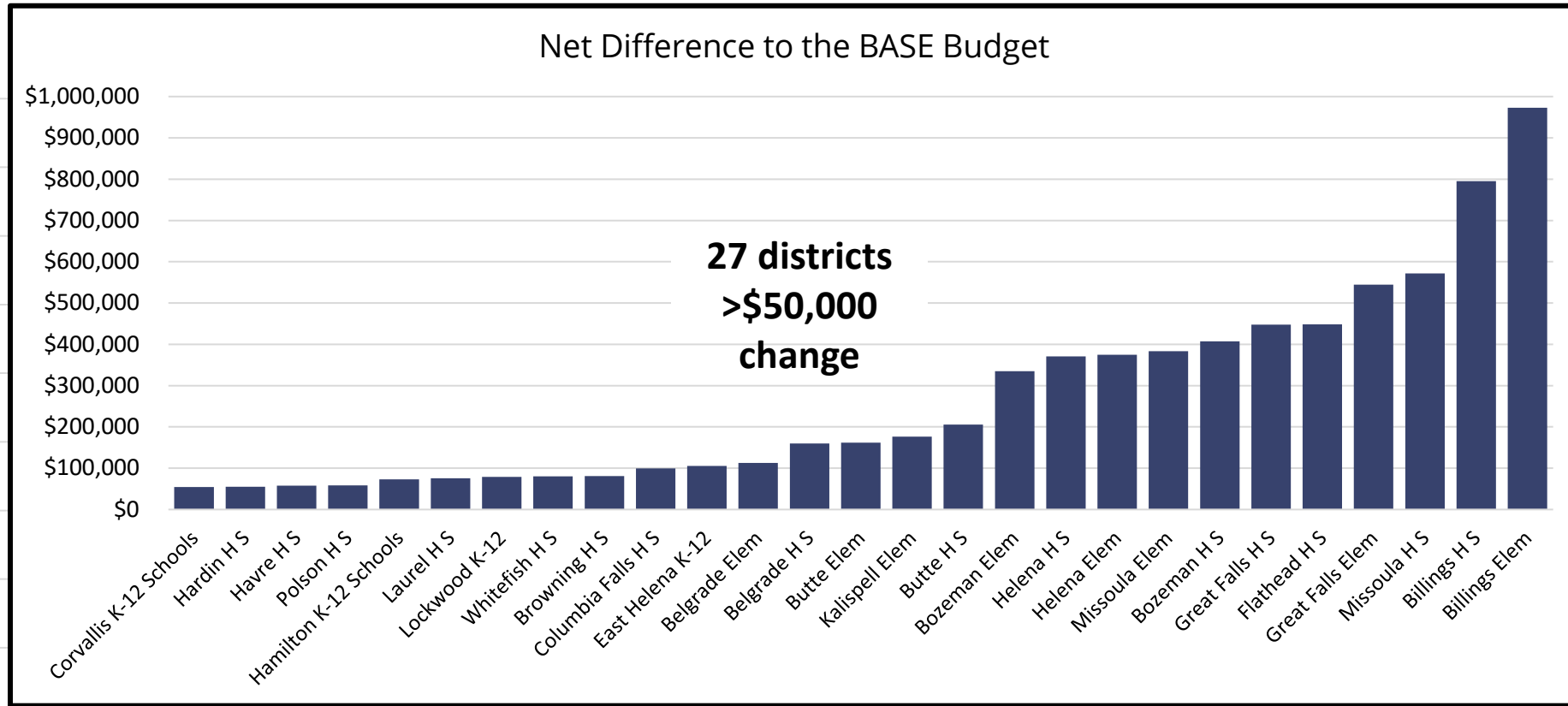
# What if both the increment and the decrement were eliminated?

Net Difference to the BASE Budget

All Districts

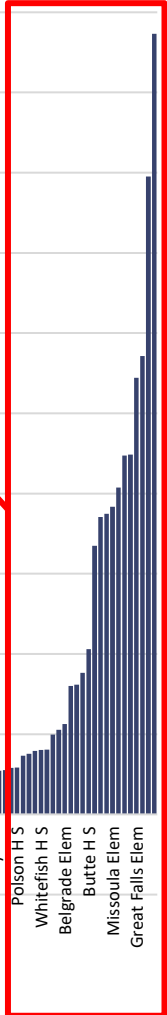


# What if both the increment and the decrement were eliminated?



\$1,000,000  
\$900,000  
\$800,000  
\$700,000  
\$600,000  
\$500,000  
\$400,000  
\$300,000  
\$200,000  
\$100,000  
\$0  
(\$100,000)

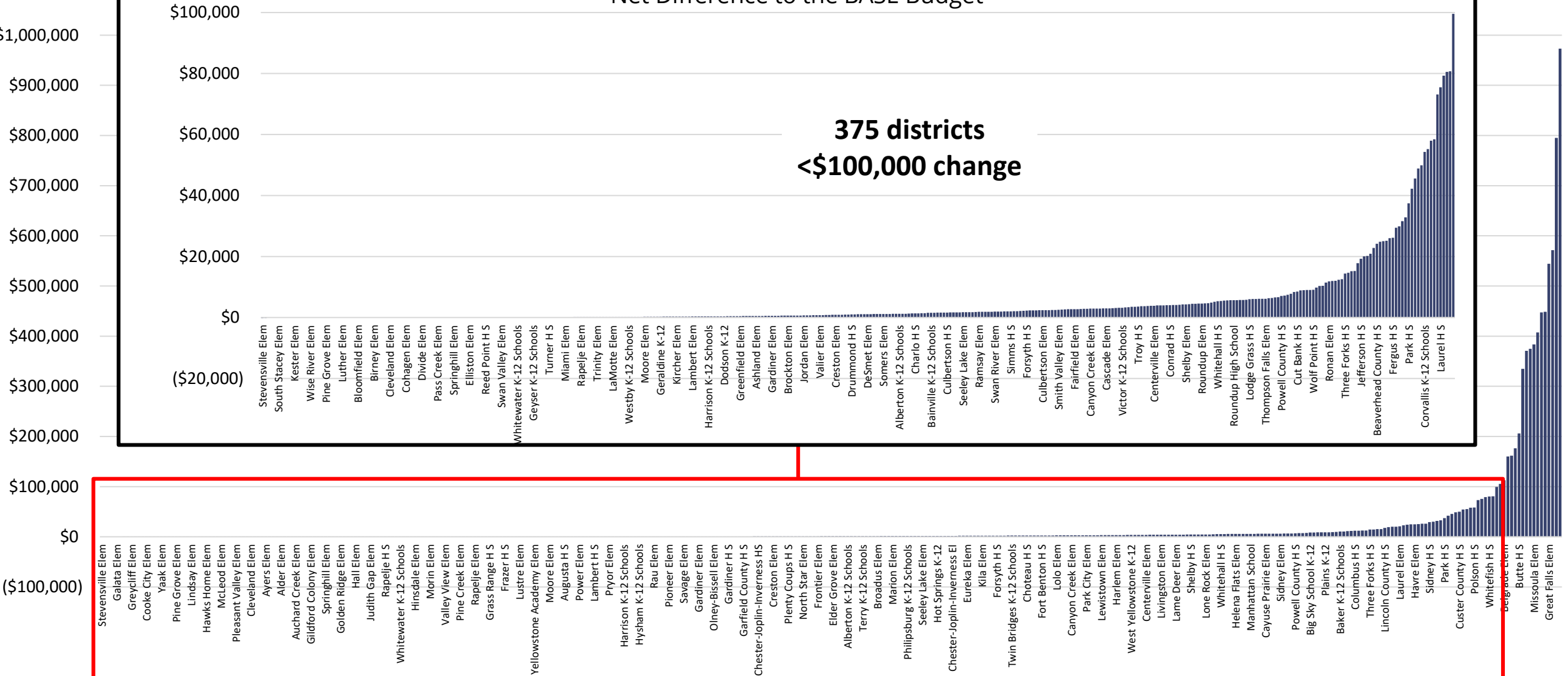
Stevensville Elem  
Galata Elem  
Greycliff Elem  
Cooke City Elem  
Yaak Elem  
Pine Grove Elem  
Lindsay Elem  
Hawks Home Elem  
McLeod Elem  
Pleasant Valley Elem  
Cleveland Elem  
Ayers Elem  
Alder Elem  
Auchard Creek Elem  
Gildford Colony Elem  
Springhill Elem  
Golden Ridge Elem  
Hall Elem  
Judith Gap Elem  
Rapelje H S  
Whitewater K-12 Schools  
Hinsdale Elem  
Morin Elem  
Valley View Elem  
Pine Creek Elem  
Rapelje Elem  
Grass Range H S  
Frazer H S  
Lustre Elem  
Yellowstone Academy Elem  
Moore Elem  
Augusta H S  
Power Elem  
Lambert H S  
Pryor Elem  
Harrison K-12 Schools  
Hysham K-12 Schools  
Rau Elem  
Pioneer Elem  
Savage Elem  
Gardiner Elem  
Olney-Bissell Elem  
Gardiner H S  
Garfield County H S  
Chester-Joplin-Inverness HS  
Creston Elem  
Plenty Coups H S  
North Star Elem  
Frontier Elem  
Elder Grove Elem  
Alberton K-12 Schools  
Terry K-12 Schools  
Broadus Elem  
Marion Elem  
Phillipsburg K-12 Schools  
Seeley Lake Elem  
Hot Springs K-12  
Chester-Joplin-Inverness El  
Eureka Elem  
Kila Elem  
Forsyth H S  
Twin Bridges K-12 Schools  
Choteau H S  
Fort Benton H S  
Lolo Elem  
Canyon Creek Elem  
Park City Elem  
Lewistown Elem  
Harlem Elem  
West Yellowstone K-12  
Centerville Elem  
Livingston Elem  
Lame Deer Elem  
Shelby H S  
Lone Rock Elem  
Whitehall H S  
Helena Flats Elem  
Manhattan School  
Cayuse Prairie Elem  
Sidney Elem  
Powell County H S  
Big Sky School K-12  
Plains K-12  
Baker K-12 Schools  
Columbus H S  
Three Forks H S  
Lincoln County H S  
Laurel Elem  
Havre Elem  
Sidney H S  
Park H S  
Custer County H S  
Polson H S  
Whitefish H S  
Belgrade Elem  
Butte H S  
Missoula Elem  
Great Falls Elem



# What if both the increment and the decrement were eliminated?

Net Difference to the BASE Budget

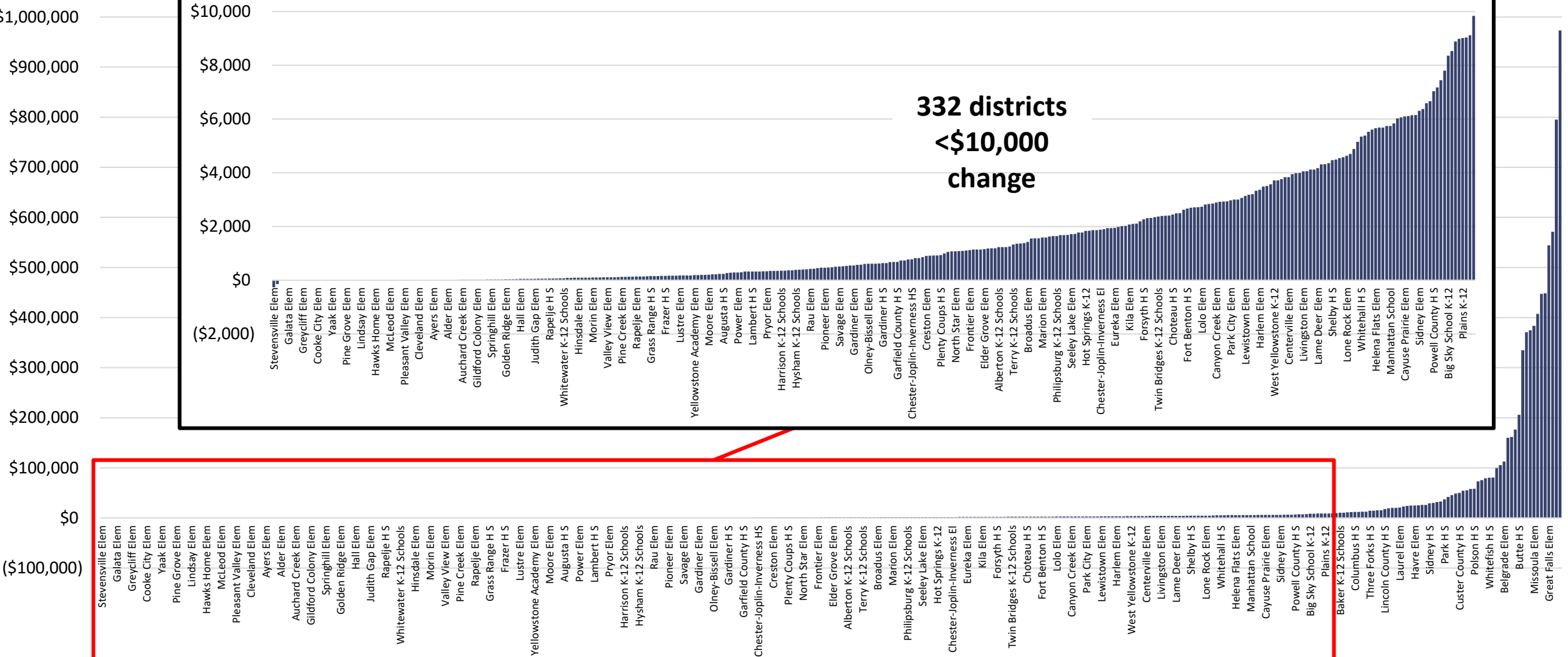
375 districts  
 <\$100,000 change



# What if both the increment and the decrement were eliminated?

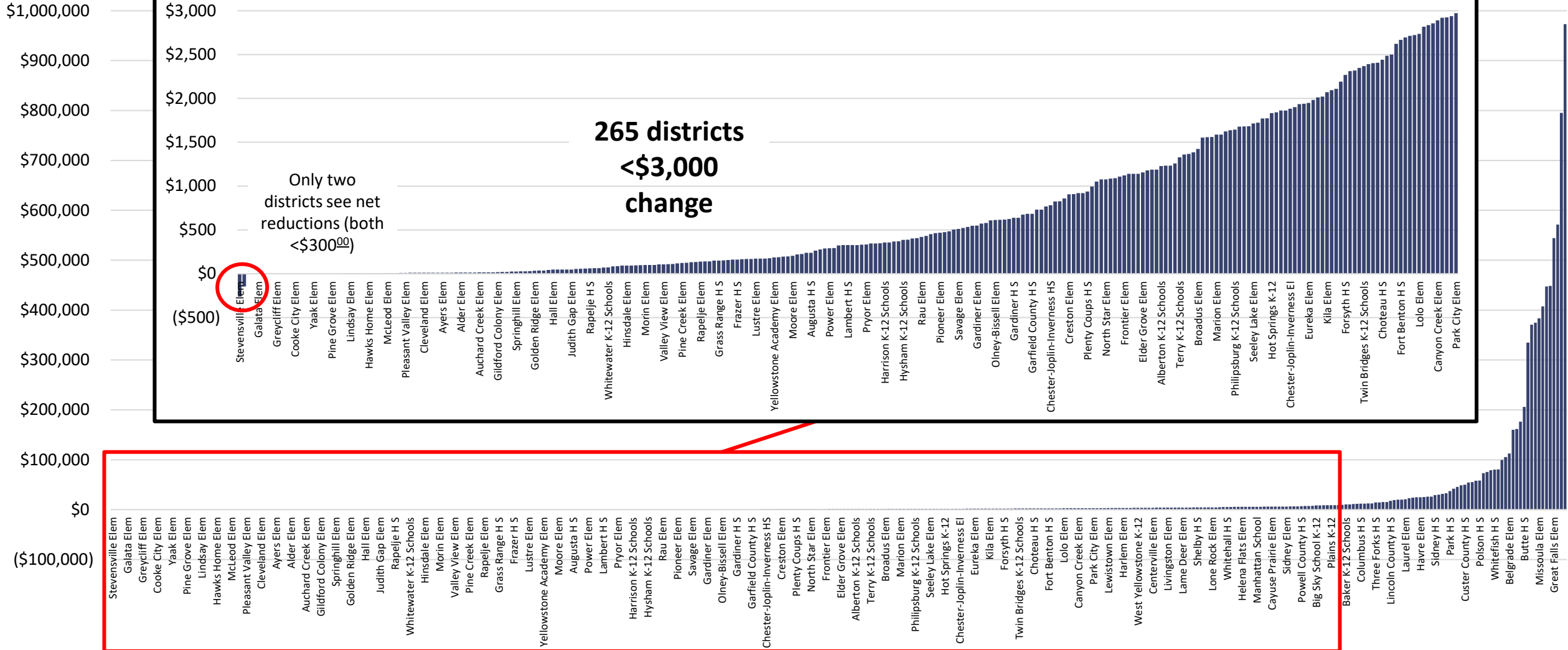
Net Difference to the BASE Budget

332 districts  
 <\$10,000  
 change



# What if both the increment and the decrement were eliminated?

Net Difference to the BASE Budget

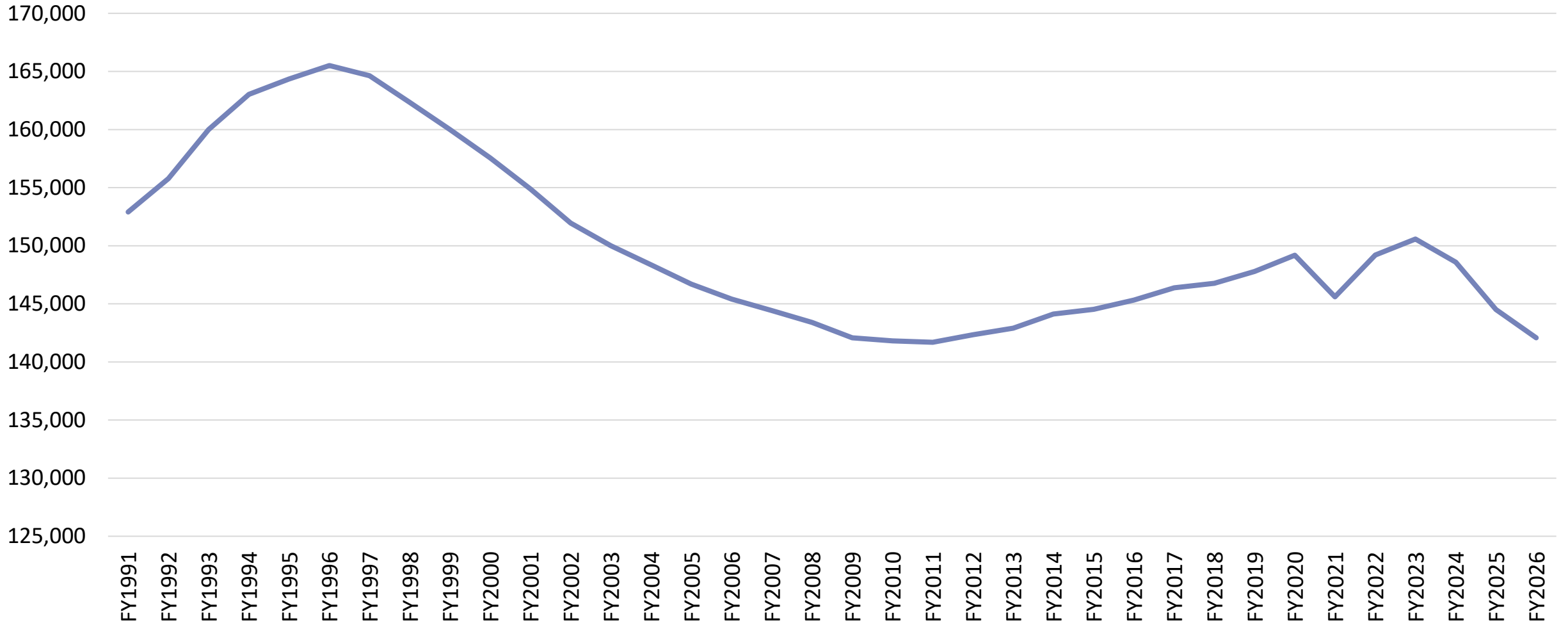


# Enrollment Trends



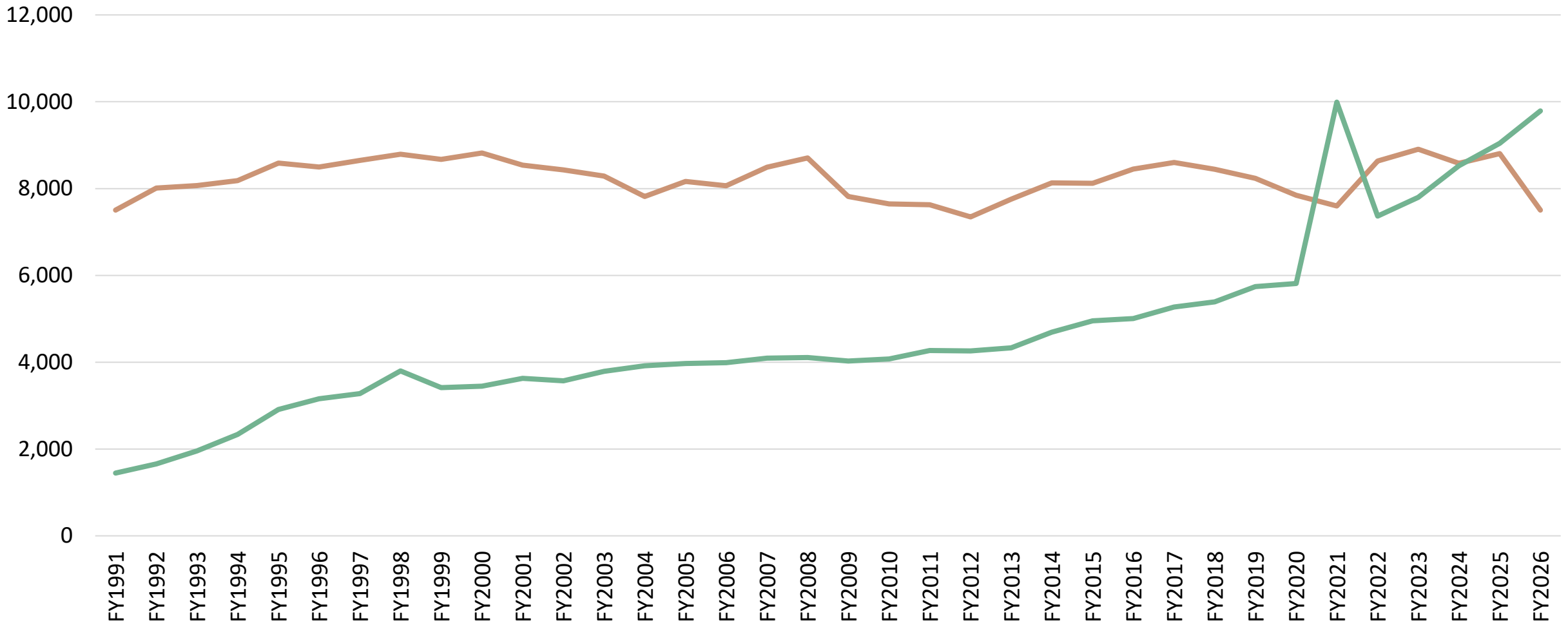
# Enrollment Trends

Public School District Enrollment FY 1991 – est. FY 2026



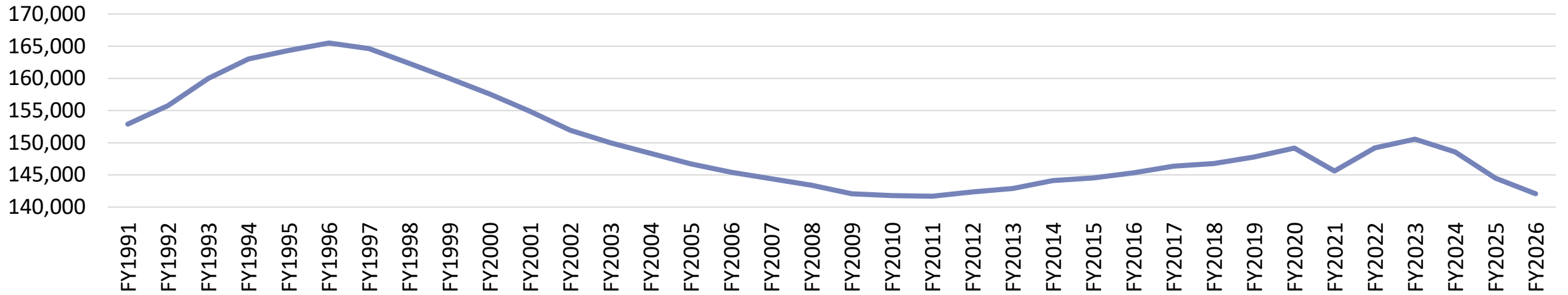
# Enrollment Trends

Private & Home School Enrollment FY 1991 – est. FY 2026

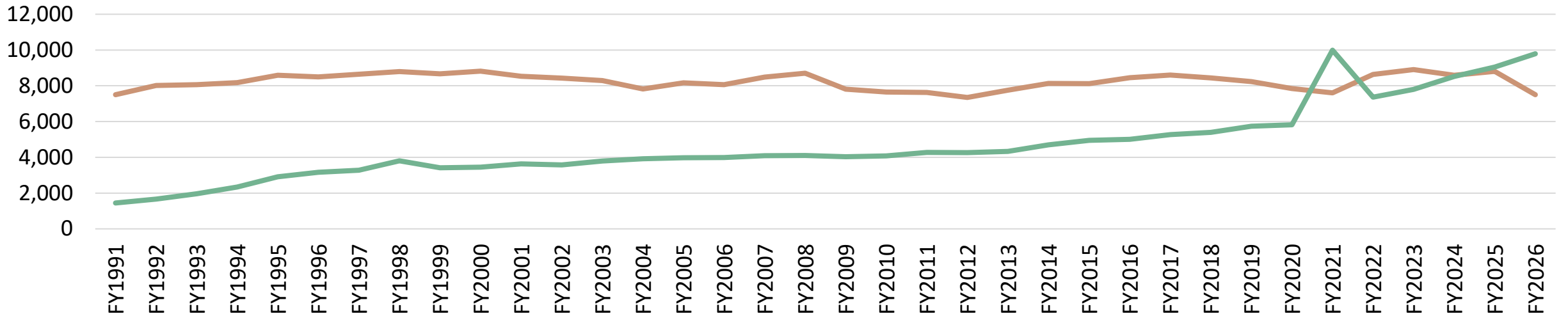


# Enrollment Trends

Public School District Enrollment FY 1991 – est. FY 2026



Private & Home School Enrollment FY 1991 – est. FY 2026



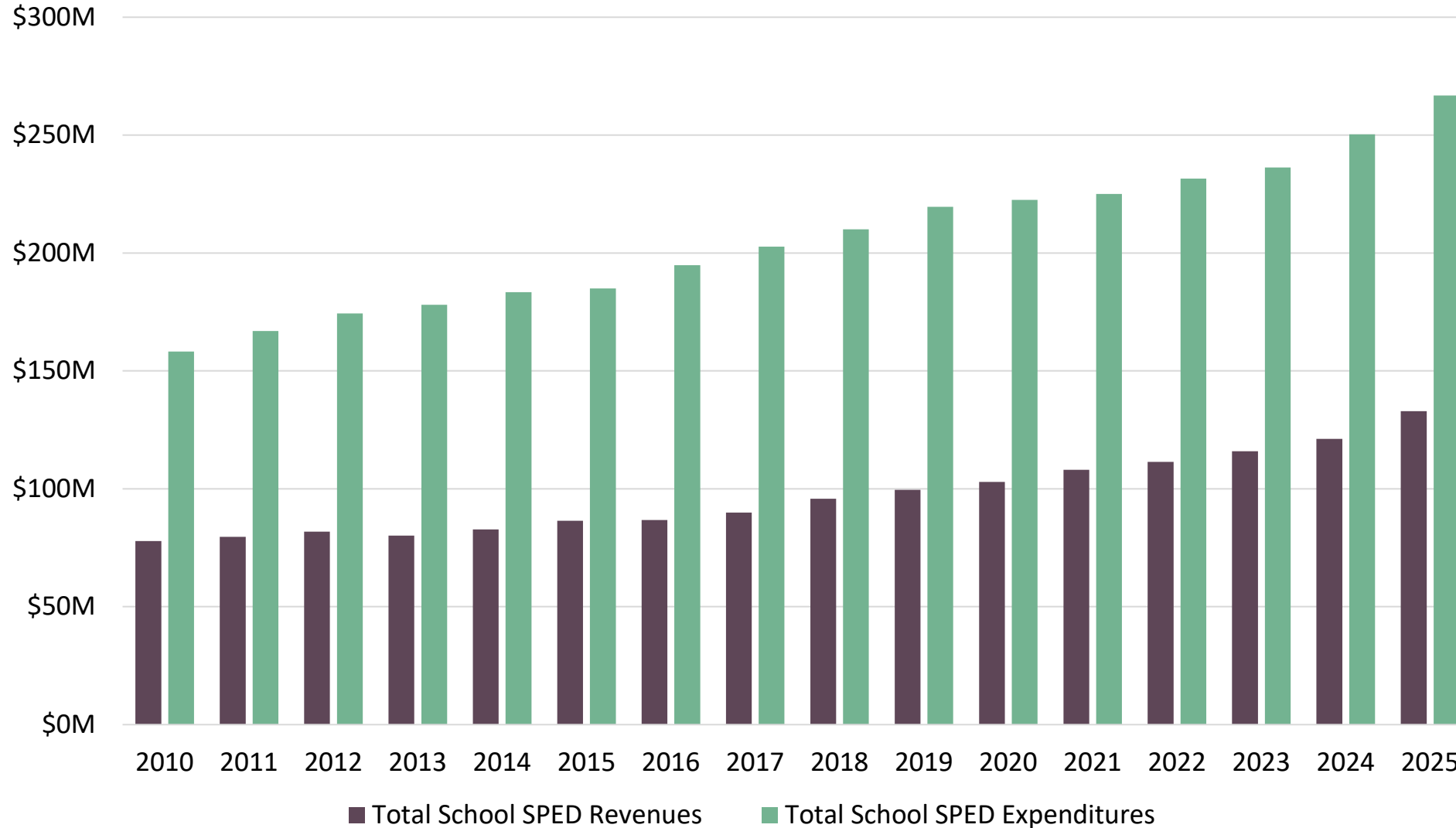


# Special Education

# Special Education Revenues

- Federal Funds
  - **Individuals with Disabilities Education Act (IDEA) funds**
    - One-time-only federal funds: Elementary and Secondary School Emergency Relief rounds I-III (ESSER, 2020-2025) IDEA funds; American Recovery and Reinvestment Act (ARRA, 2009) IDEA funds
  - Impact Aid
    - Certain Impact Aid funds that are earmarked for special education
    - Impact Aid general support payments *may* be used for special education costs at the receiving district's discretion
  - Other federal funds as allowed by federal law
    - Ex: Title I fund *may* be used to supplement special education costs
- State and Local Funds
  - **State Special Education Allowable Cost Payment**
    - **Instructional Block Grant (IBG)**
    - **Related Services Block Grant (RSBG)**
    - **Reimbursement for Disproportionate Costs**
    - **Special Education Coop Funding**
  - **Minimum amount of district general fund to avoid reversion – local matching funds for the state allowable cost payment**
    - **Districts must spend at least \$1 for every \$3 of IBG and RSBG funds received to avoid reversion**
    - **These local matching funds come from the district general fund, which is funded by a blend of state and local dollars including the five fully state funded components, direct state aid, guaranteed tax base aid, local property tax levies (some required, some voted), and non-levy revenues**
  - **Permissive tuition fund levies for certain in-district student IEP special education costs**
  - Special education resources transferred from other districts or coops
  - Other non-earmarked local school district funding used for special education costs
- Medicaid and private insurance reimbursement payments

# State Special Education Revenues vs. Expenditures

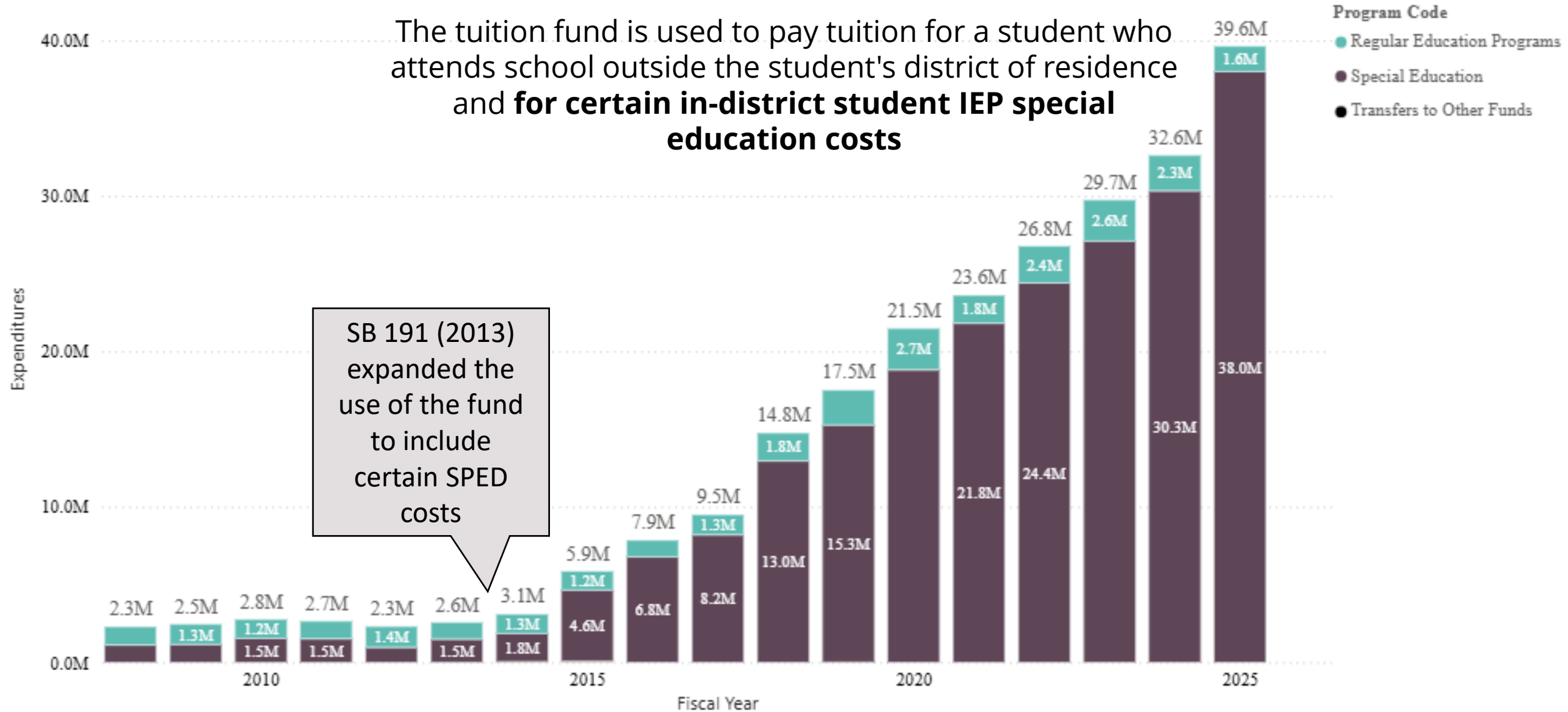


Expenditures cannot always be tied to revenue sources, so expenditures exceeding the selected revenues could be funded with:

- Funds that *may* be used for special education (Title I, Impact Aid)
- District general fund
- Non-earmarked district funds used for special education
- Insurance reimbursements

# Tuition Fund Expenditures

The tuition fund is used to pay tuition for a student who attends school outside the student's district of residence and **for certain in-district student IEP special education costs**



SB 191 (2013) expanded the use of the fund to include certain SPED costs

# Divvying out the State Special Education Allowable Cost Payment to Districts and Co-ops

Component	Distribution	% of total	Sp Ed approp
Instructional Block Grant (IBG)	ANB (about \$150/ANB)	52.5%	\$21.3 million
Related Services Block Grant (RSBG)	ANB (about \$50/ANB)	17.5%	\$7.1 million
Reimbursement for Disproportionate Costs	Complex; high-cost students	25%	\$10.2 million
Co-op Admin and Travel	ANB, FTE, mileage	5%	\$2.0 million
Total State Special Education Approp HB 2		100%	\$40.6 million

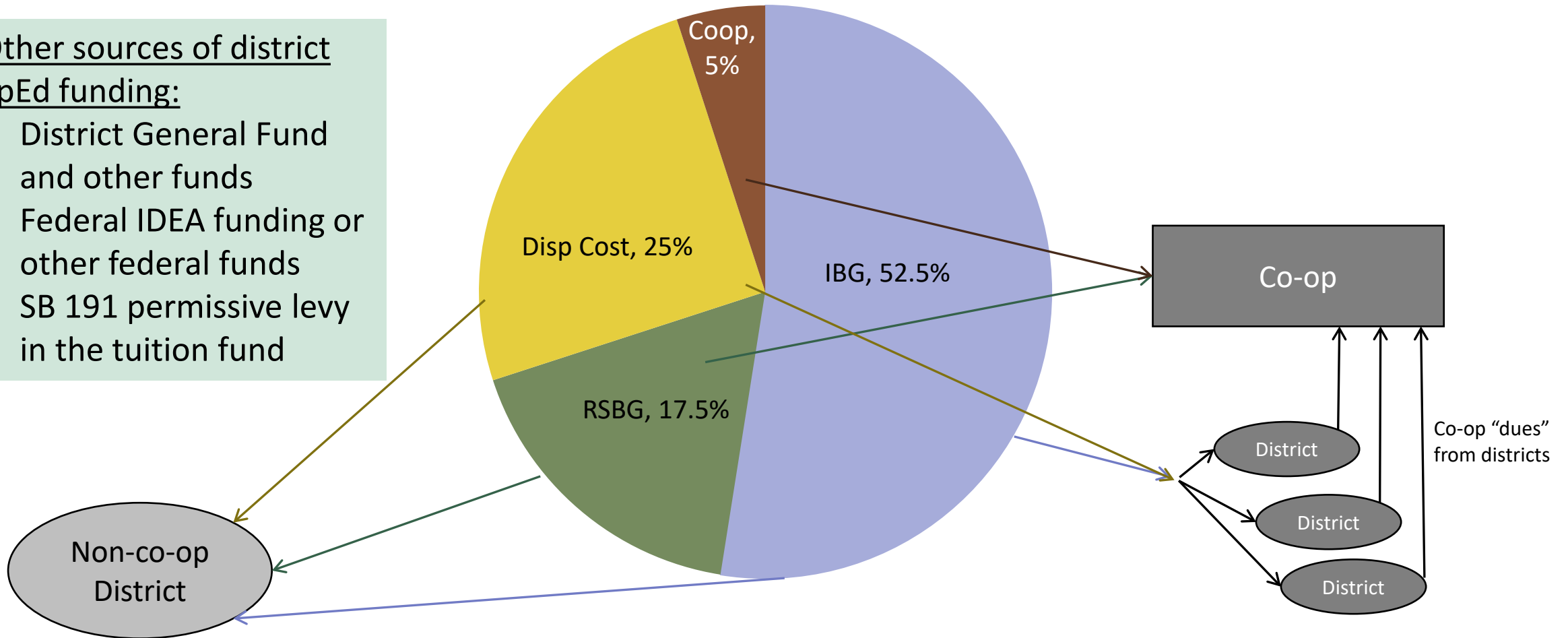
**The Block Grants are paid on ALL ANB, not just special education students.**

If about 1 in 10 students require special education, then the state payments for the IBG and RSBG provide about \$2,000 in additional funding per special ed student. The local match and federal funds add to this and bring the total amount of additional funds to about \$4,000. While this may be adequate for the differential costs for a student with mild disabilities, the costs for a student with moderate or severe disabilities may greatly exceed this amount.

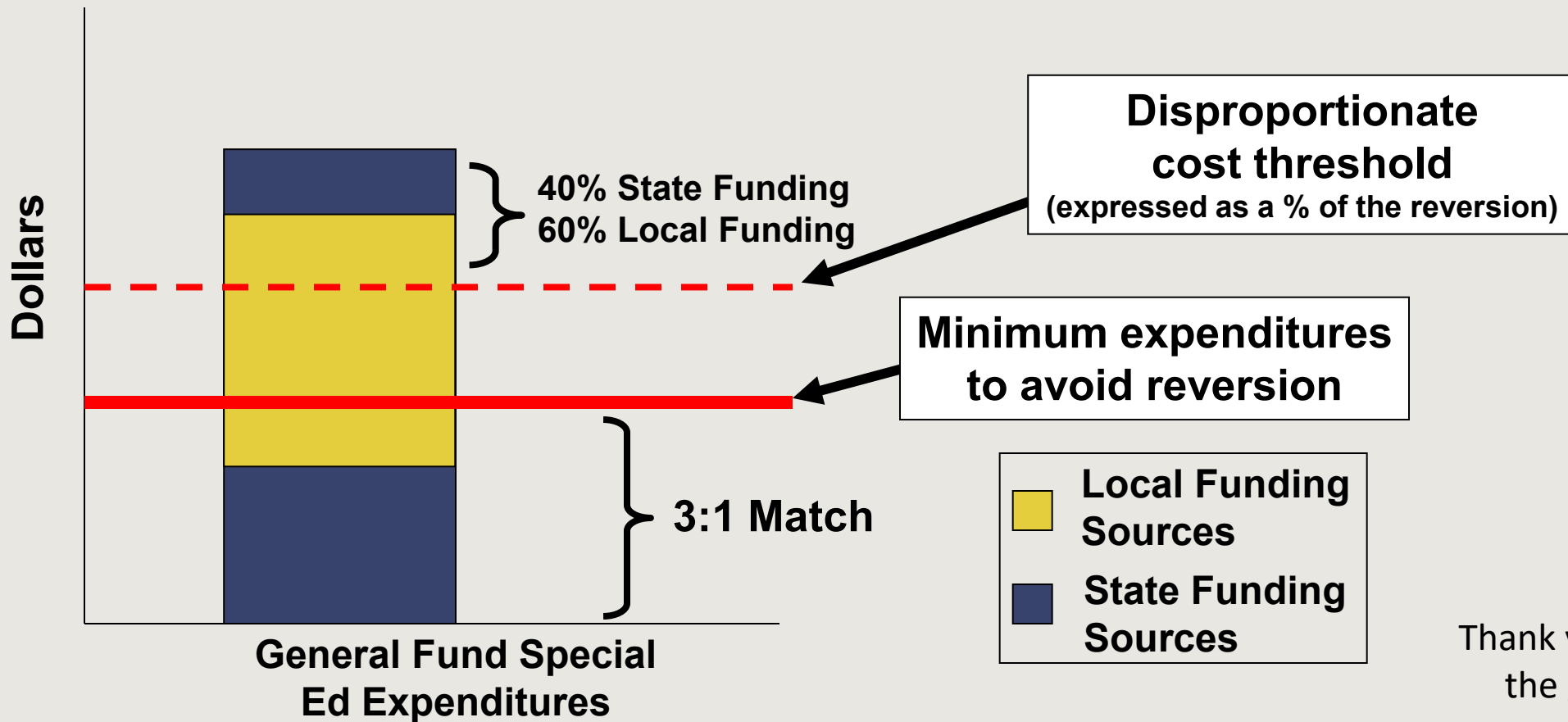
# Divvying out the State Special Education Allowable Cost Payment to Districts and Co-ops

## Other sources of district SpEd funding:

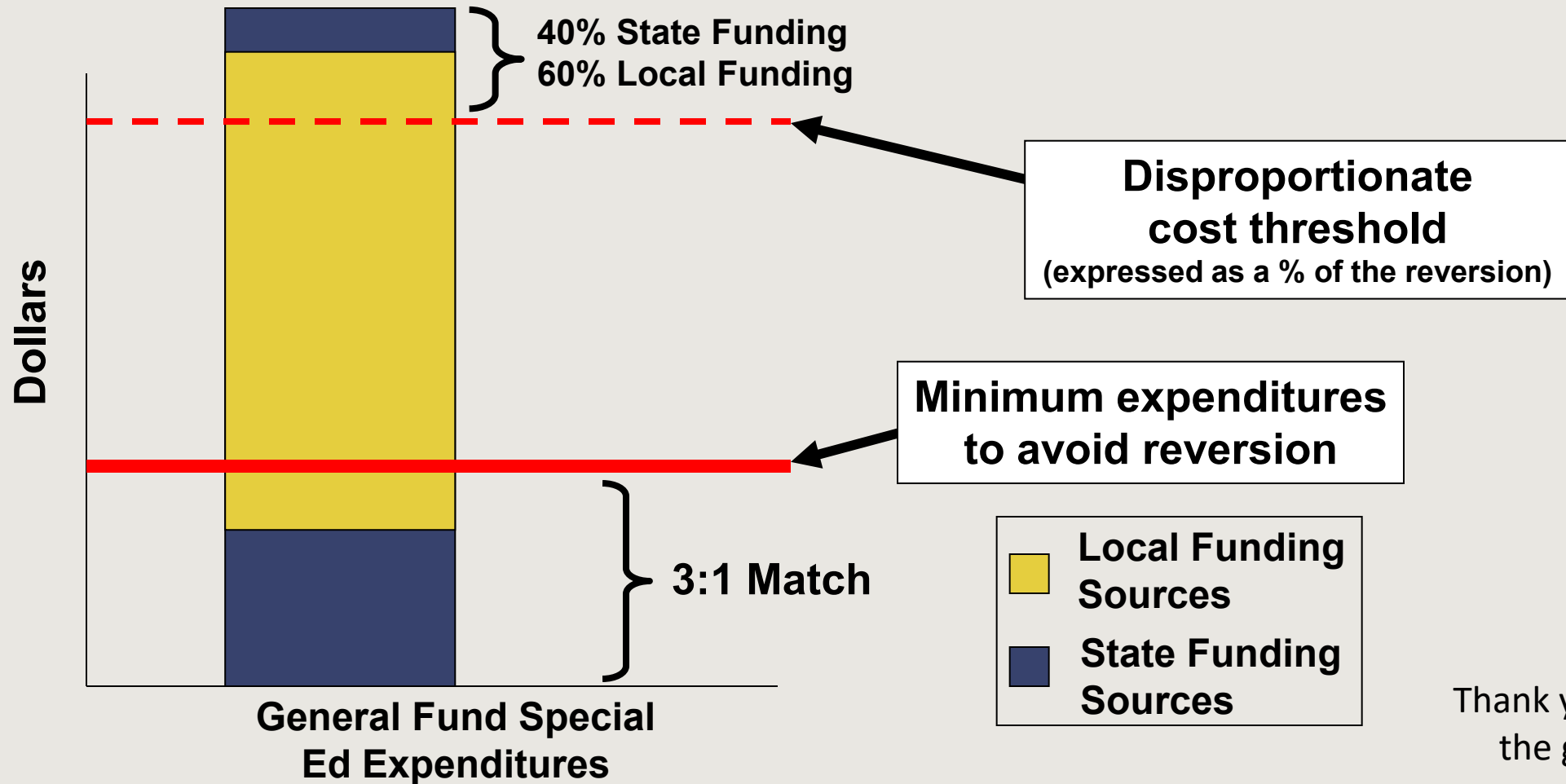
- District General Fund and other funds
- Federal IDEA funding or other federal funds
- SB 191 permissive levy in the tuition fund



# Special Education – Disproportionate Cost Payment (circa 2005 with a threshold of **130%**)

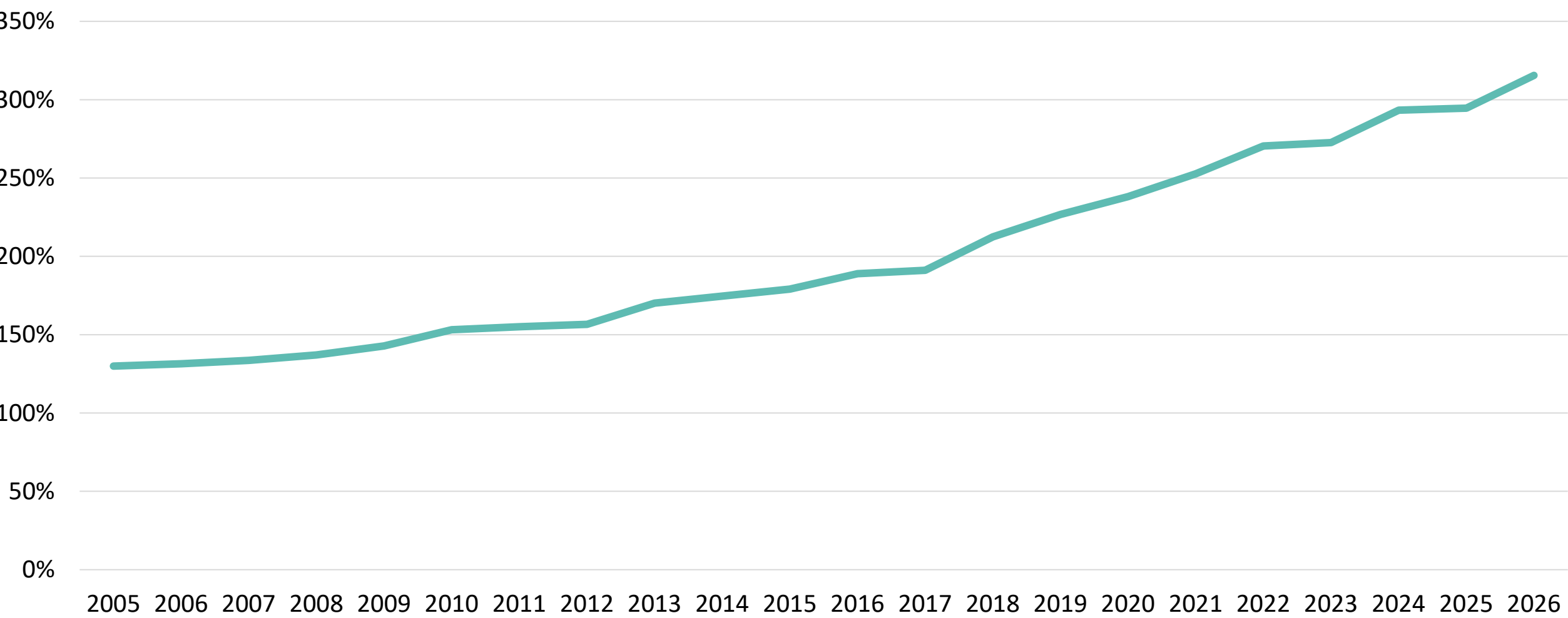


# Special Education – Disproportionate Cost Payment (circa 2025 with a threshold of 300%)



# Special Education – Disproportionate Cost Payment Threshold Level History

Disproportionate Cost Payment Threshold Level





# **Longitudinal Mental Health Trends**

# Mental Health Lens: Maslow's Hierarchy of Needs



[https://en.wikipedia.org/wiki/File:Maslow%27s\\_Hierarchy\\_of\\_Needs\\_Pyramid\\_\(original\\_five-level\\_model\).png](https://en.wikipedia.org/wiki/File:Maslow%27s_Hierarchy_of_Needs_Pyramid_(original_five-level_model).png)



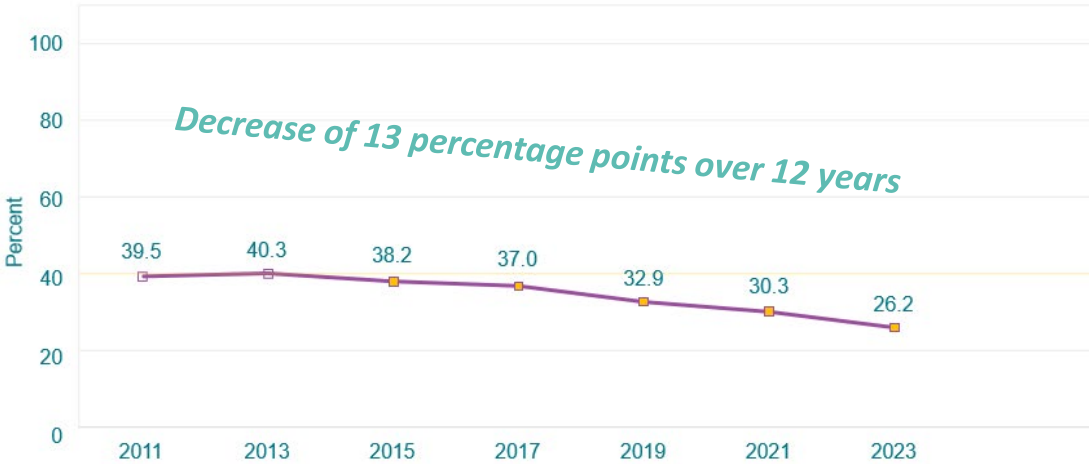
# Mental Health Physiological Needs



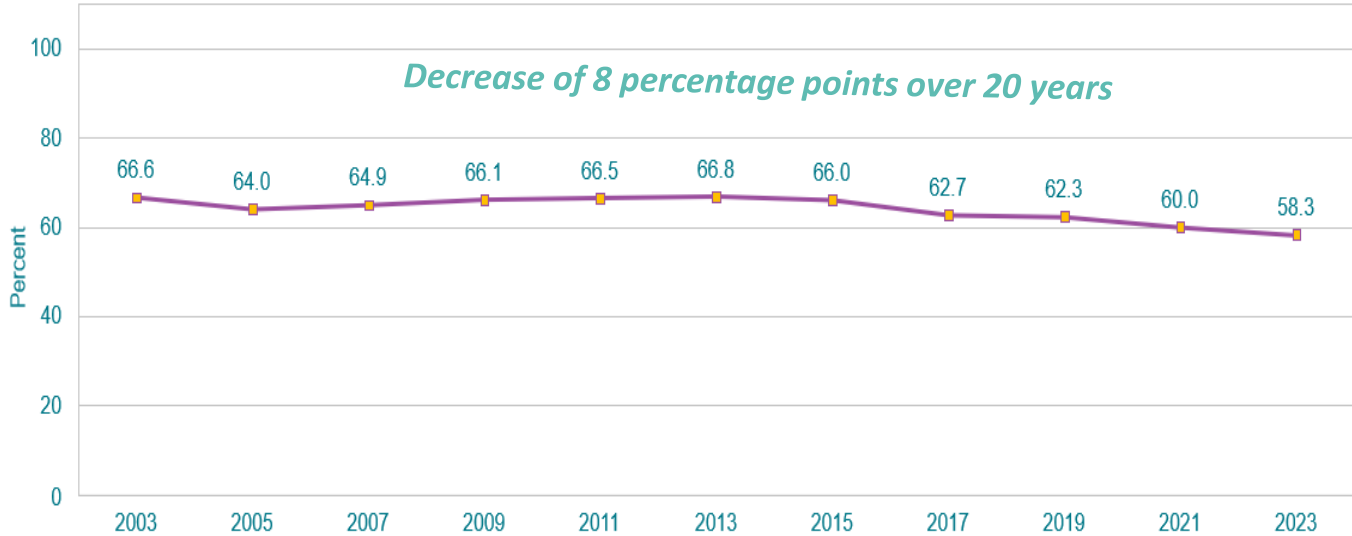
[https://en.wikipedia.org/wiki/File:Maslow%27s\\_Hierarchy\\_of\\_Needs\\_Pyramid\\_\(original\\_five-level\\_model\).png](https://en.wikipedia.org/wiki/File:Maslow%27s_Hierarchy_of_Needs_Pyramid_(original_five-level_model).png)

# Mental Health and Diet

Percentage of High School Students Who Ate Breakfast on All 7 Days,\* 2011-2023†



Percentage of High School Students Who Ate Vegetables One or More Times Per Day,\* 2003-2023†

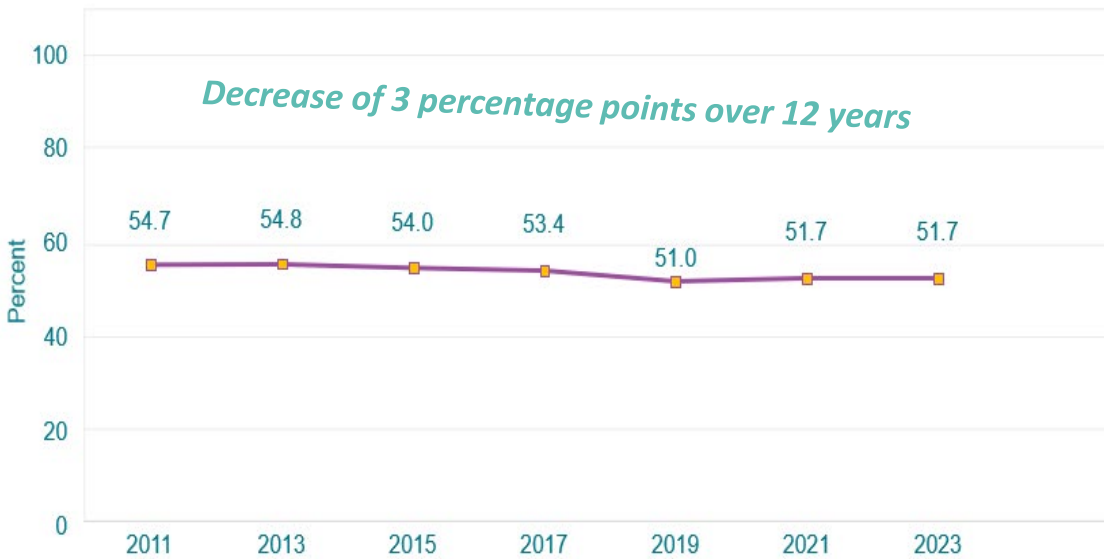


**Takeaway:**  
 Students report eating breakfasts and/or vegetables at lower rates than in the past.



# Mental Health and Activity

Percentage of High School Students Who Were Physically Active at Least 60 Minutes Per Day on 5 or More Days,\* 2011-2023†



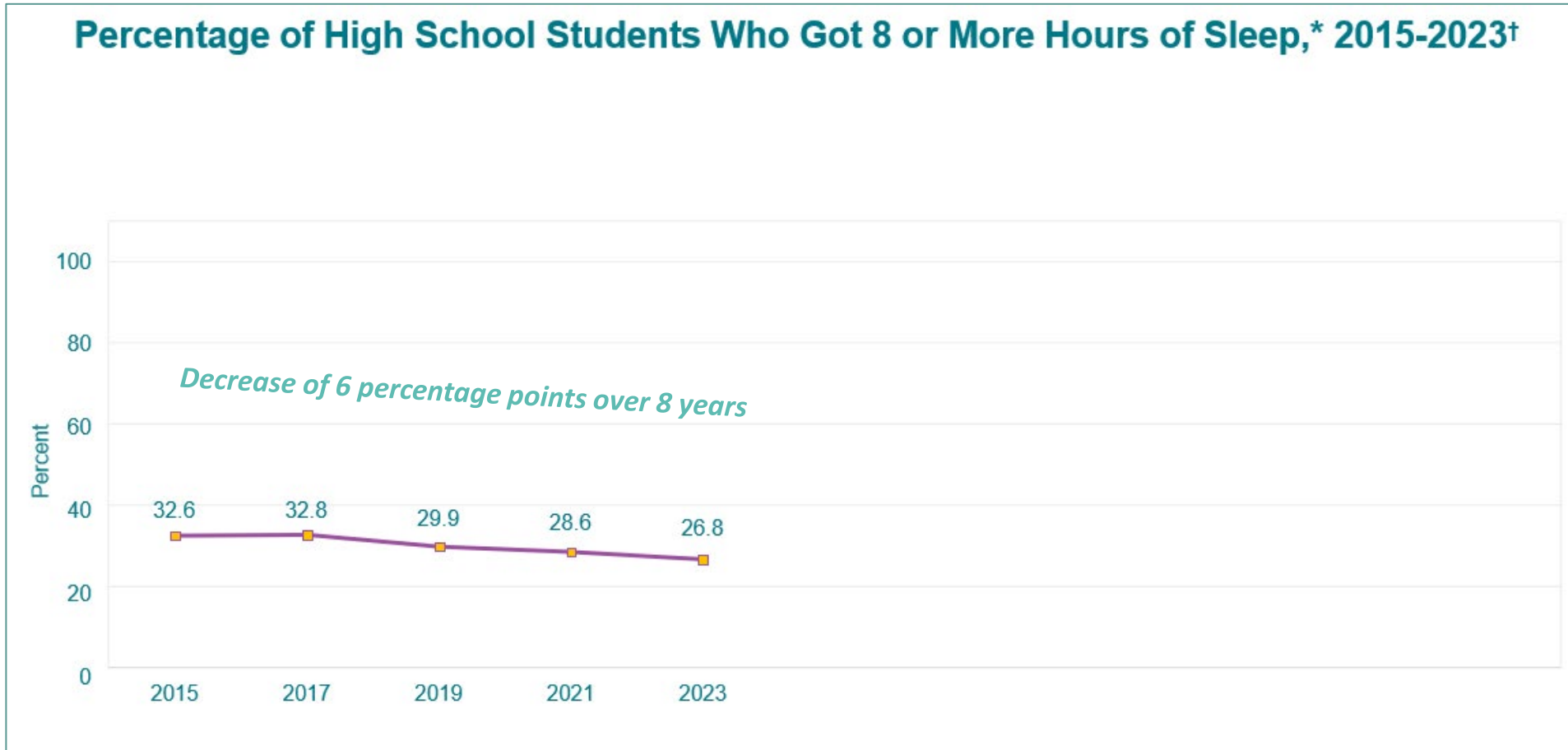
Percentage of High School Students Who Spent 3 or More Hours of Screen Time,\* 2021-2023†



**Takeaway:**  
Rates of physical activity and screen time have not changed substantially since YRBS began collecting the data.



# Mental Health and Sleep



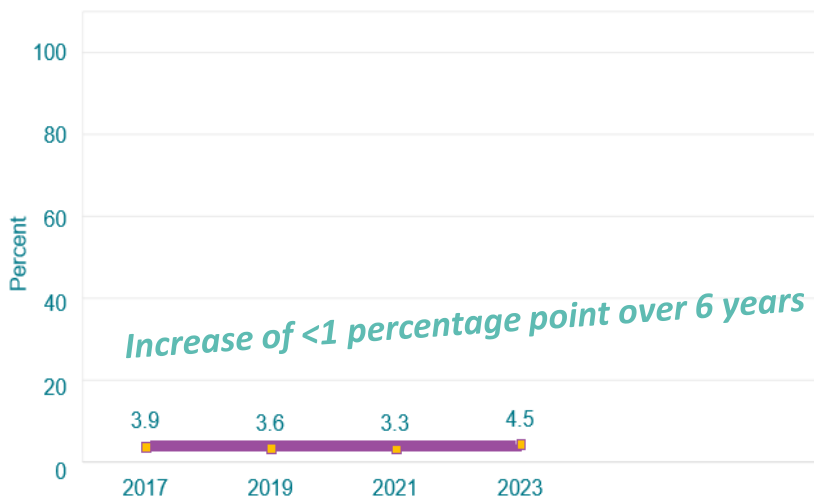
**Takeaway:**

Students report getting adequate sleep at lower rates than in the past.



# Mental Health and Shelter

Percentage of High School Students Who Experienced Unstable Housing,\* 2017-2023†



Percentage of High School Students Who Have Ever Slept Away from Their Parents or Guardians Because They Were Kicked Out, Ran Away, or Were Abandoned,\* 2021-2023†



**Takeaway:**

There has been a small increase in students experiencing housing instability in the few years since YRBS began collecting this data.





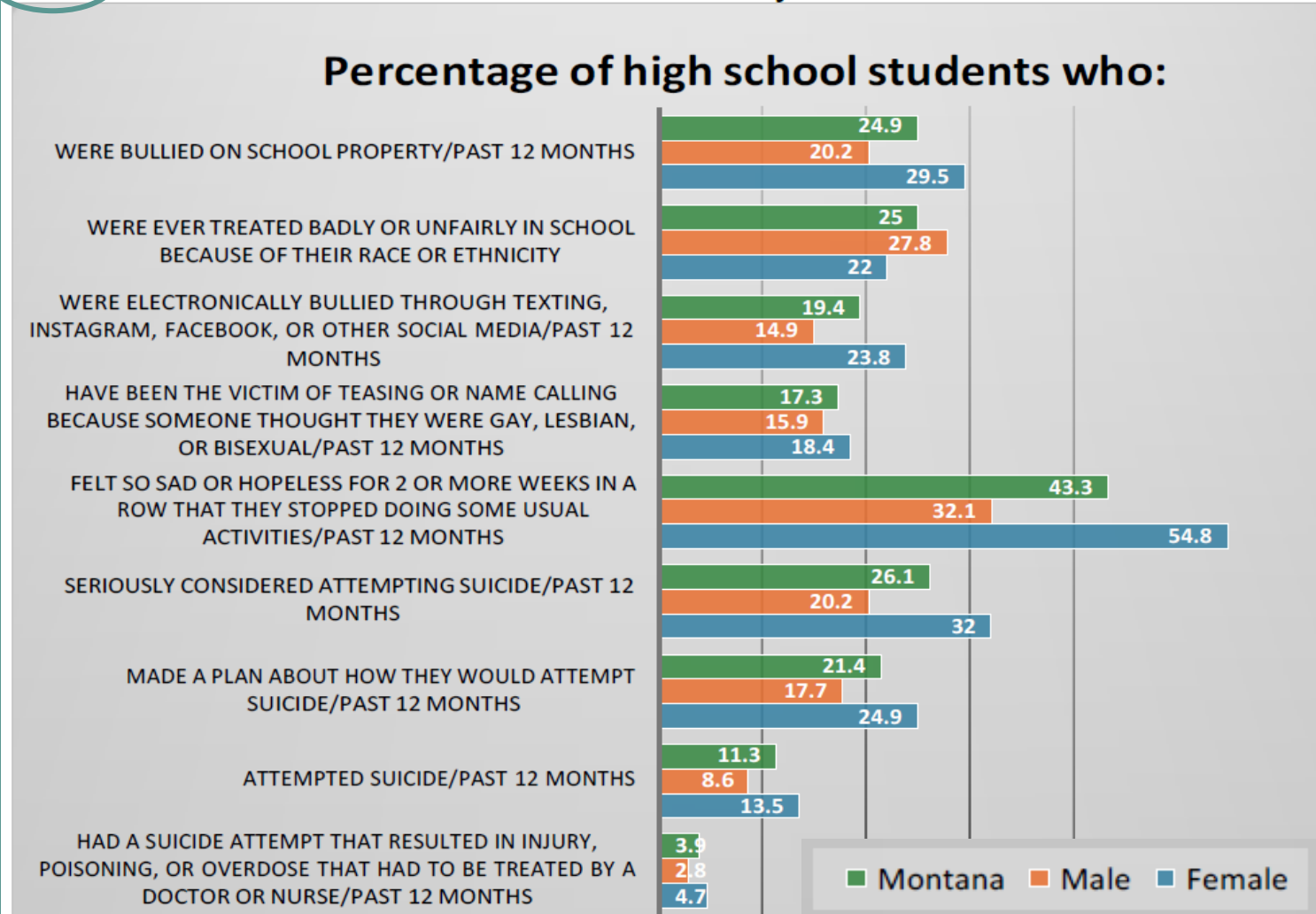
# Mental Health Safety / Security Needs



[https://en.wikipedia.org/wiki/File:Maslow%27s\\_Hierarchy\\_of\\_Needs\\_Pyramid\\_\(original\\_five-level\\_model\).png](https://en.wikipedia.org/wiki/File:Maslow%27s_Hierarchy_of_Needs_Pyramid_(original_five-level_model).png)

# Mental Health – Bullying and Suicide

2023 Montana Youth Risk Behavior Survey



YRBS data 2023

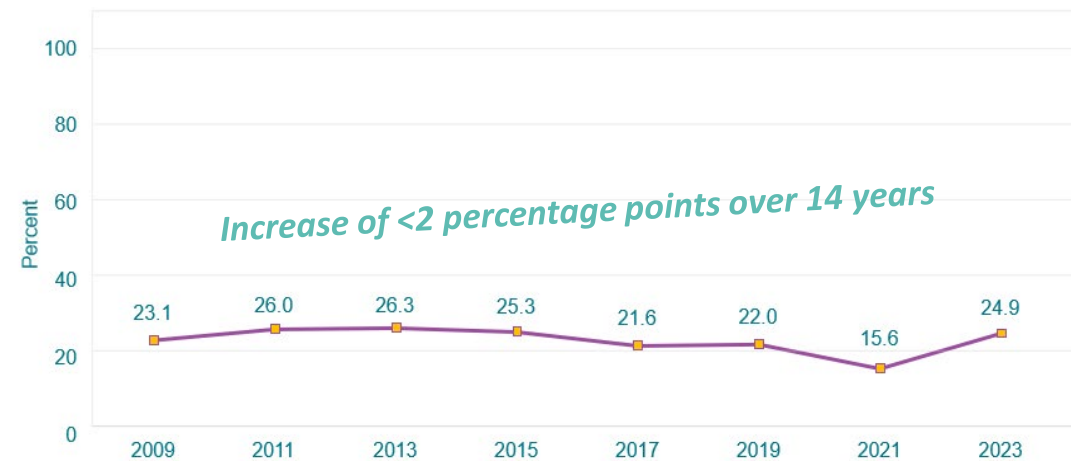
OPI webpage: <https://opi.mt.gov/Leadership/Data-Reporting/Youth-Risk-Behavior-Survey>

Note that some questions have been added since data collection began in 1991. Longitudinal analysis covers the entire timespan that each question has been asked on the YRBS.

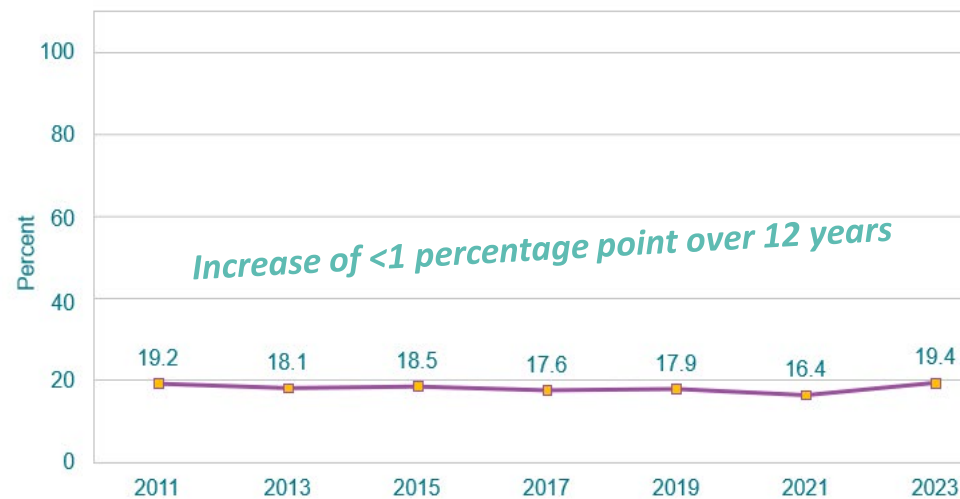


# Mental Health and Bullying

Percentage of High School Students Who Were Bullied on School Property,\* 2009-2023†



Percentage of High School Students Who Were Electronically Bullied,\* 2011-2023†



**Takeaway:**

Rates at which students report being bullied have remained mostly the same since 2009.

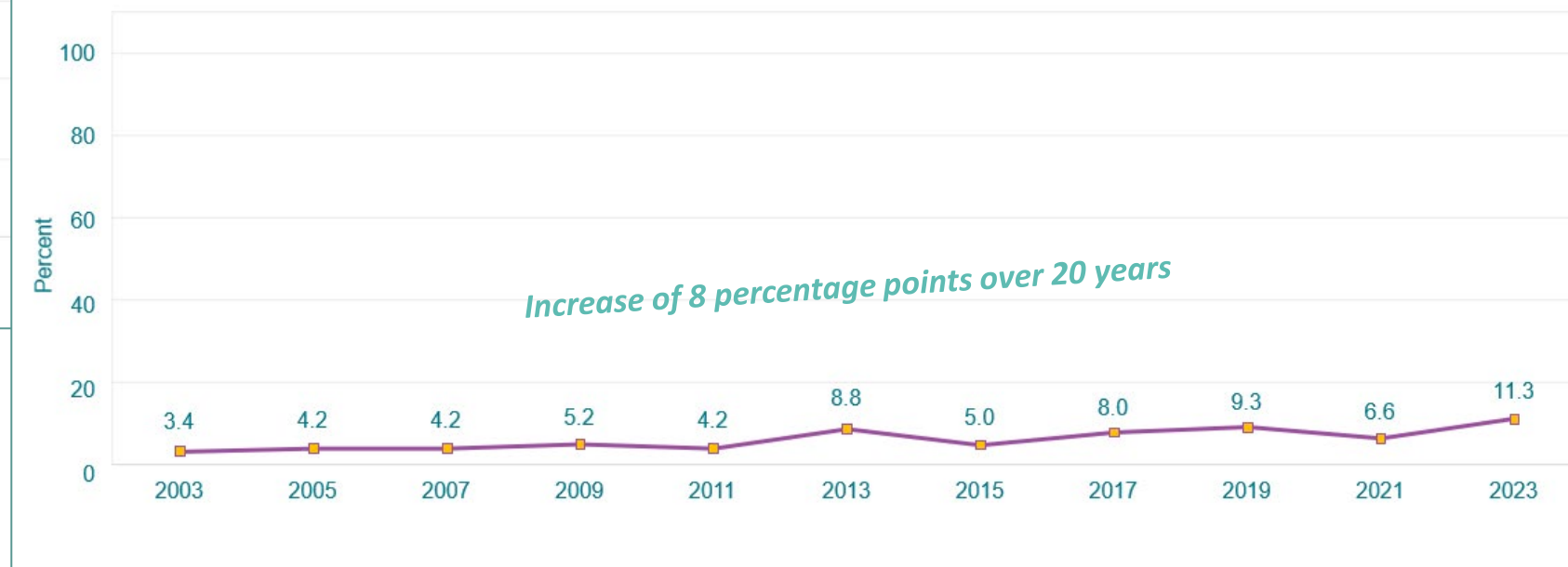


# Mental Health and Safety

Percentage of High School Students Who Have Been the Victim of Teasing or Name Calling Because Someone Thought They Were Gay, Lesbian, or Bisexual,\* 2017-2023†



Percentage of High School Students Who Did Not Go to School Because They Felt Unsafe at School or on Their Way to or from School,\* 2003-2023†

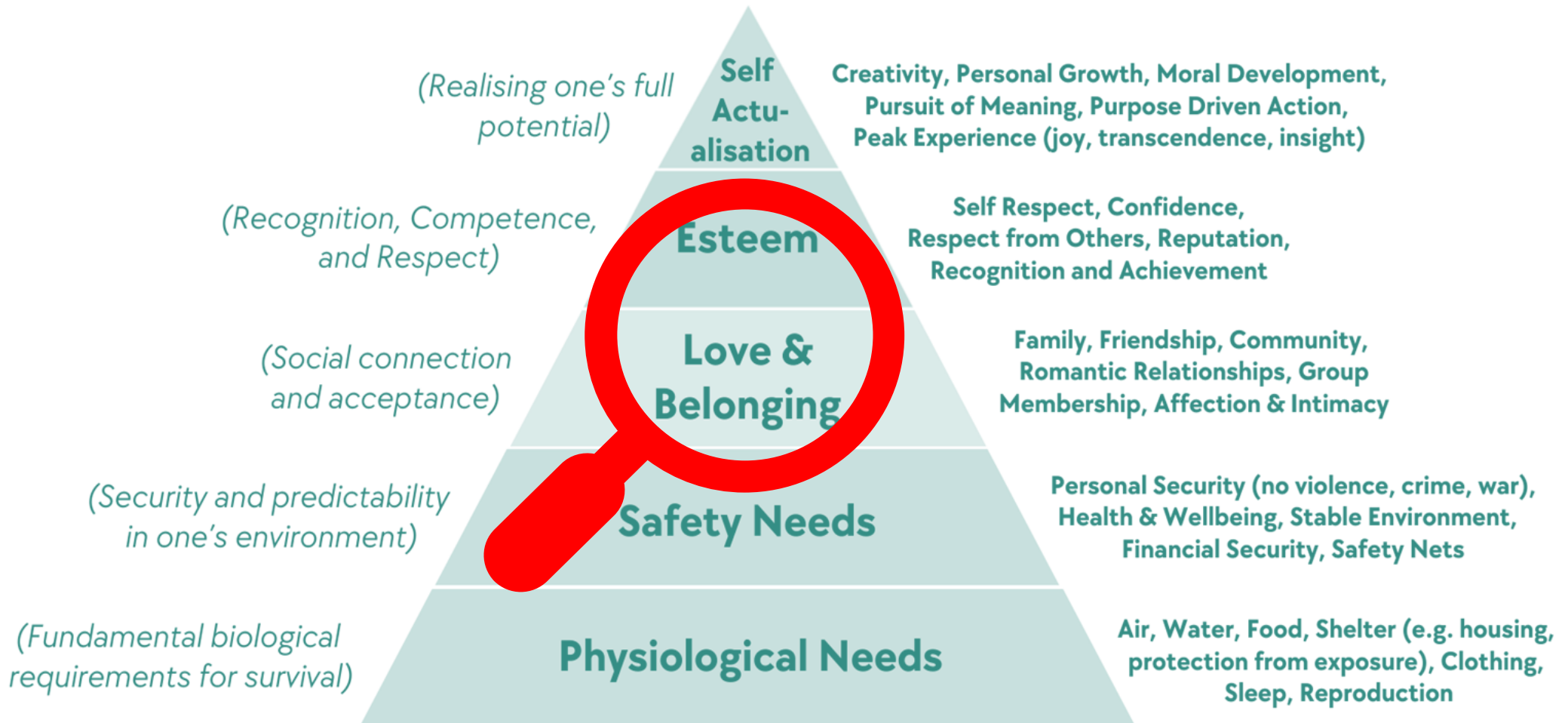


**Takeaway:**  
Students increasingly report experiencing teasing or feeling unsafe at school.



# Mental Health

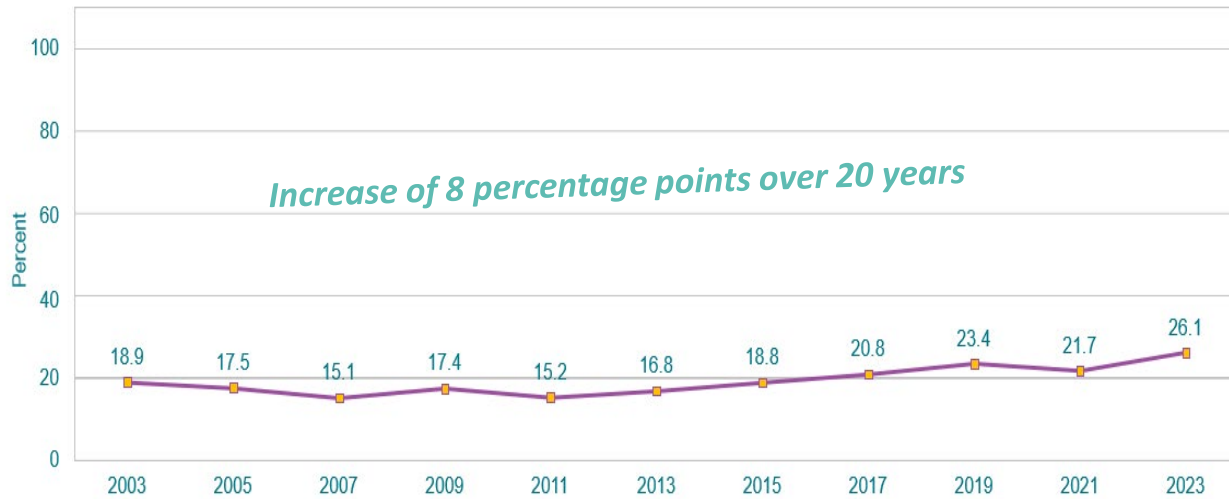
## Social & Self Esteem Needs



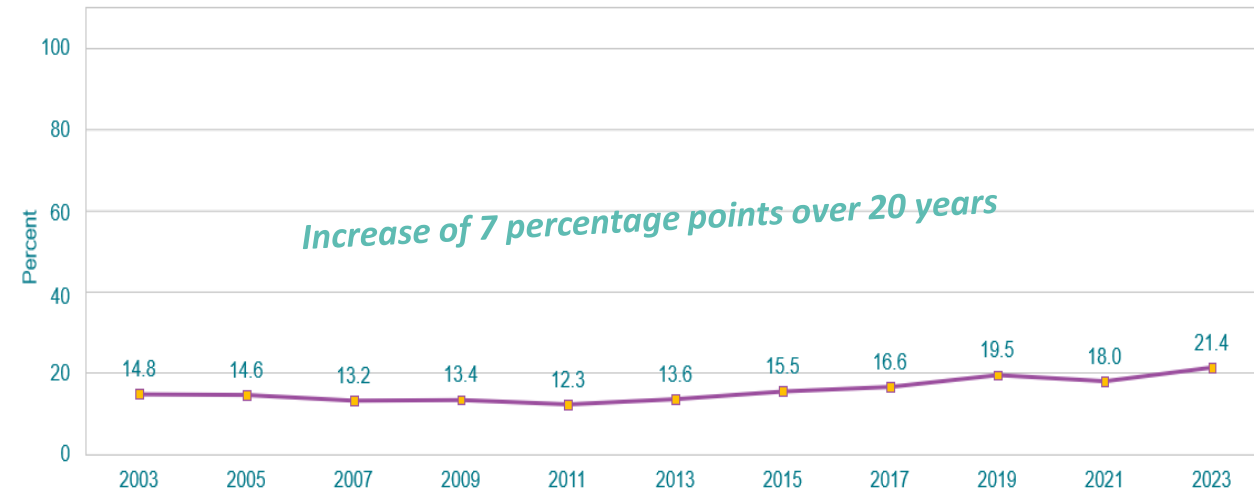
[https://en.wikipedia.org/wiki/File:Maslow%27s\\_Hierarchy\\_of\\_Needs\\_Pyramid\\_\(original\\_five-level\\_model\).png](https://en.wikipedia.org/wiki/File:Maslow%27s_Hierarchy_of_Needs_Pyramid_(original_five-level_model).png)

# Mental Health and Suicidal Ideation

Percentage of High School Students Who Seriously Considered Attempting Suicide,\* 2003-2023†



Percentage of High School Students Who Made a Plan About How They Would Attempt Suicide,\* 2003-2023†



**Takeaway:**  
Students increasingly report considering or making a plan to attempt suicide.



YRBS data 1991-2023

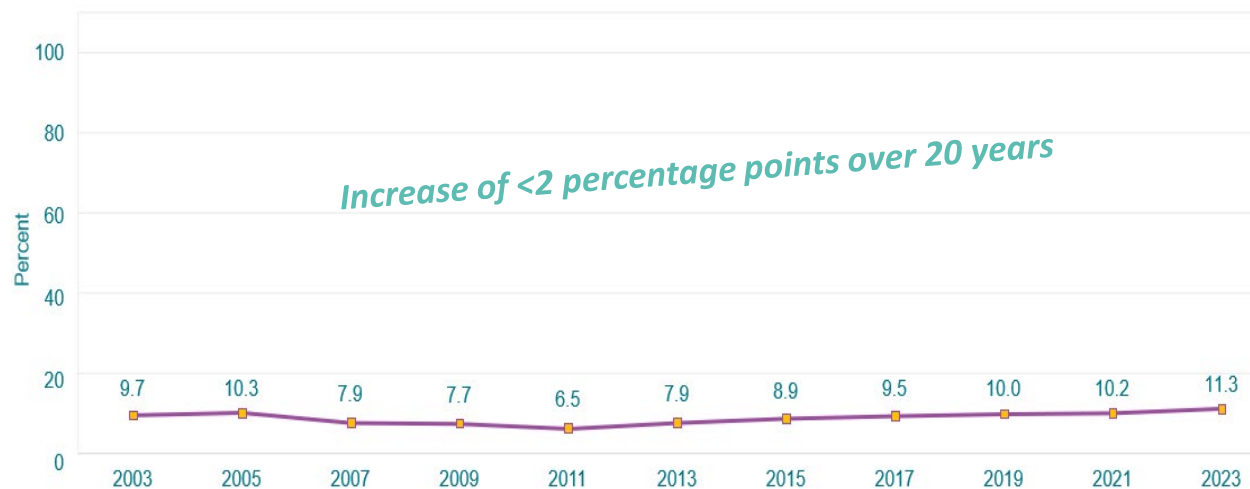
OPI webpage: <https://opi.mt.gov/Leadership/Data-Reporting/Youth-Risk-Behavior-Survey>

Note that some questions have been added since data collection began in 1991. Longitudinal analysis covers the entire timespan that each question has been asked on the YRBS.

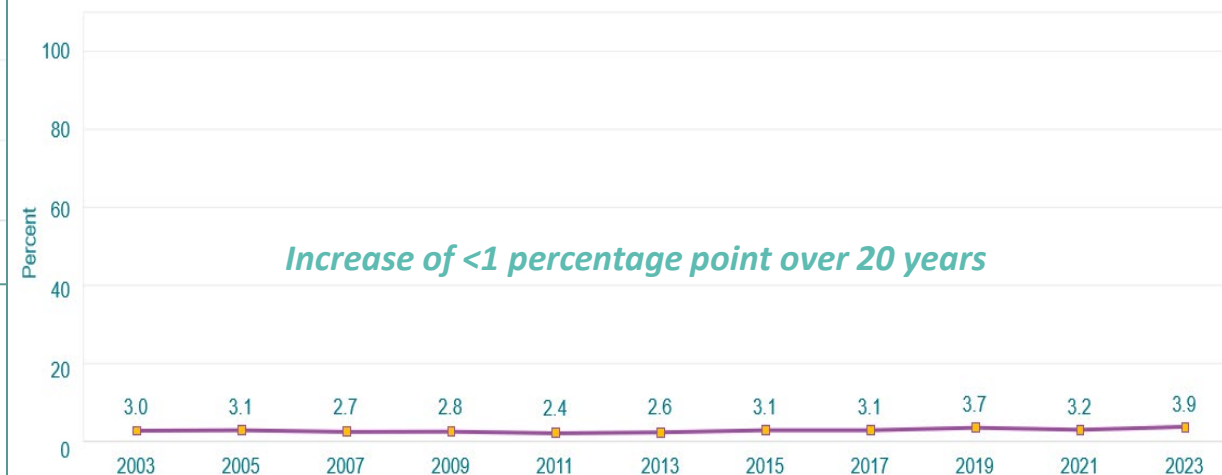


# Mental Health and Suicidal Attempts

Percentage of High School Students Who Attempted Suicide,\* 2003-2023†



Percentage of High School Students Who Had a Suicide Attempt That Resulted in an Injury, Poisoning, or Overdose That Had to Be Treated by a Doctor or Nurse,\* 2003-2023†



**Takeaway:**

Students report a small increase in suicide attempts, including attempts that result in a medical visit.



YRBS data 1991-2023

OPI webpage: <https://opi.mt.gov/Leadership/Data-Reporting/Youth-Risk-Behavior-Survey>

Note that some questions have been added since data collection began in 1991. Longitudinal analysis covers the entire timespan that each question has been asked on the YRBS.

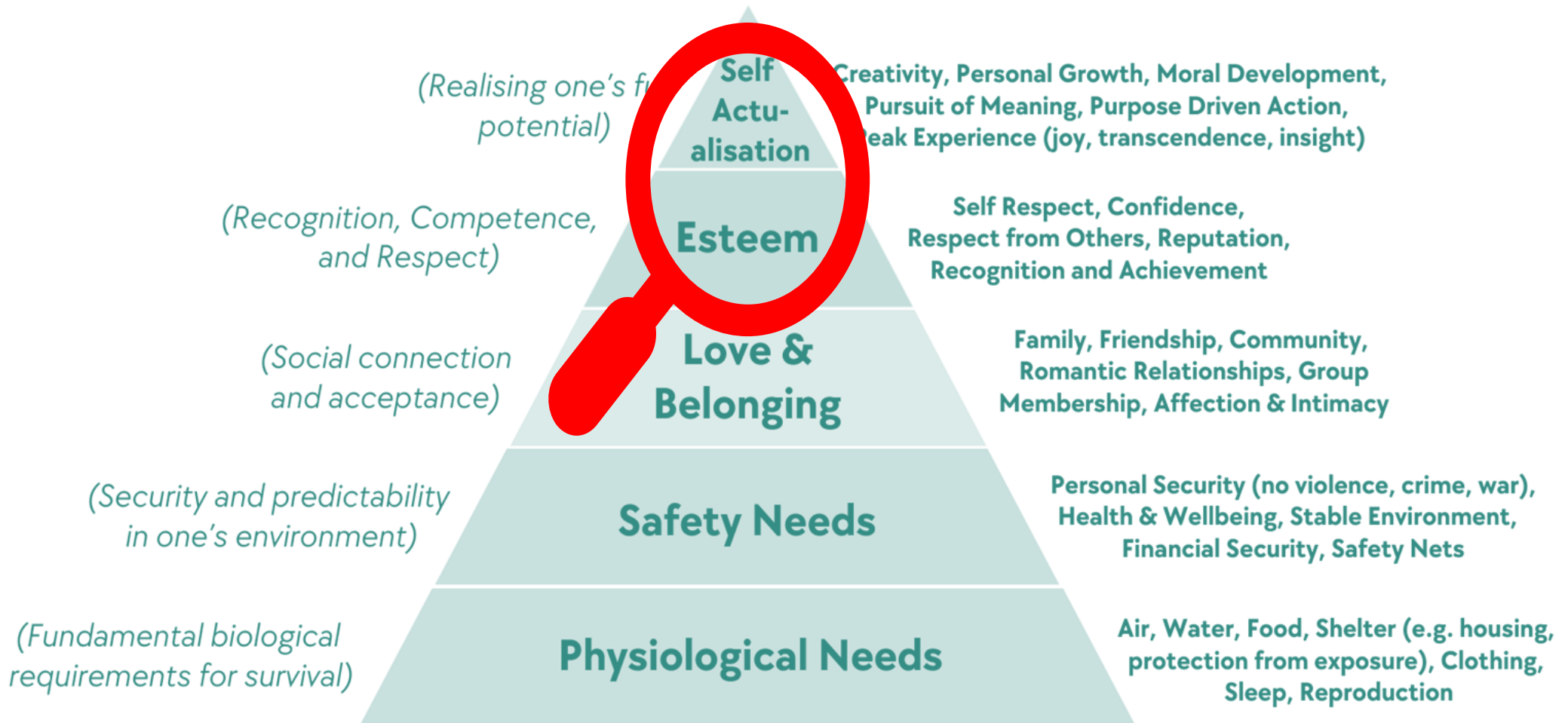




# Mental Health



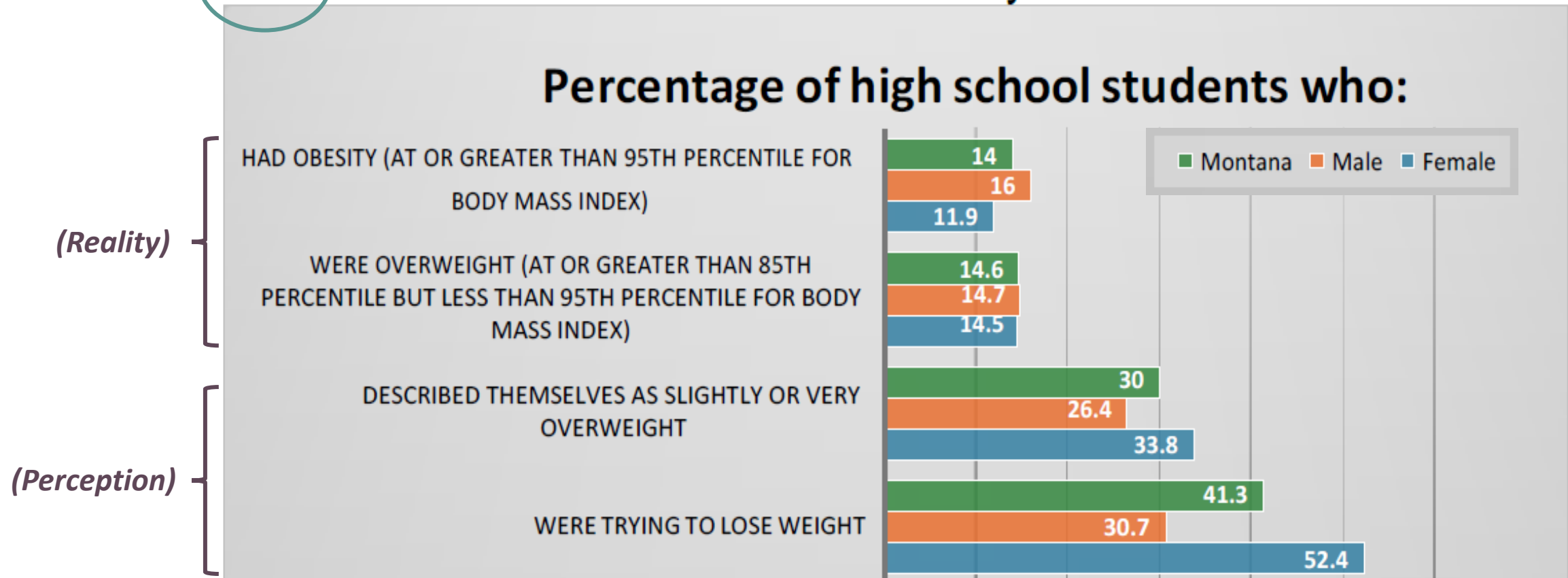
## Self Esteem & Actualization Needs



[https://en.wikipedia.org/wiki/File:Maslow%27s\\_Hierarchy\\_of\\_Needs\\_Pyramid\\_\(original\\_five-level\\_model\).png](https://en.wikipedia.org/wiki/File:Maslow%27s_Hierarchy_of_Needs_Pyramid_(original_five-level_model).png)

# Mental Health - Negative Self Image

2023 Montana Youth Risk Behavior Survey



YRBS data 1991-2023

OPI webpage: <https://opi.mt.gov/Leadership/Data-Reporting/Youth-Risk-Behavior-Survey>

Note that some questions have been added since data collection began in 1991. Longitudinal analysis covers the entire timespan that each question has been asked on the YRBS.

LEGISLATIVE  
SERVICES  
DIVISION

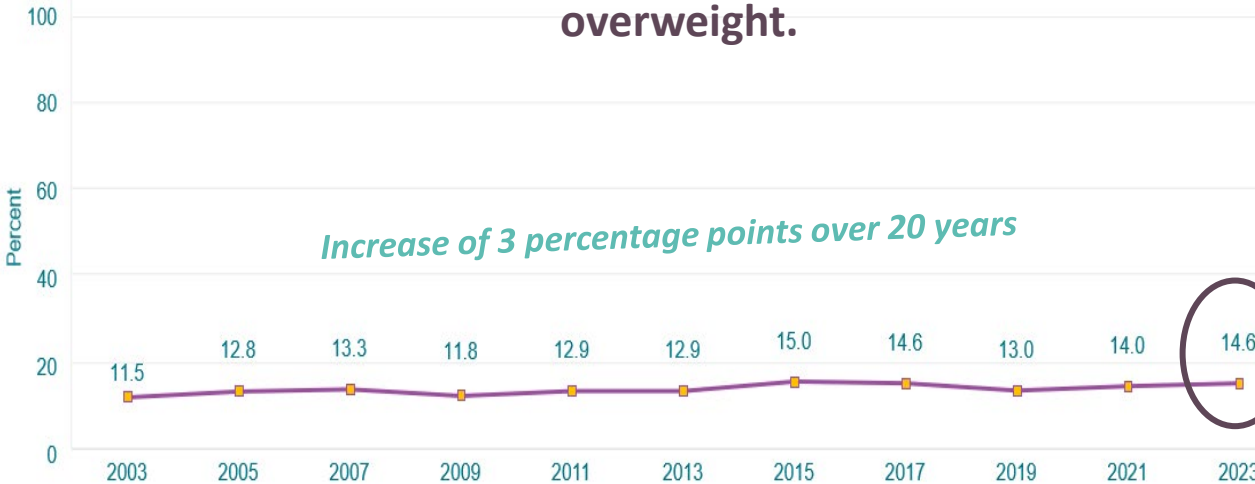
# Mental Health and Negative Self-Image

Percentage of High School Students Who Were Overweight,\* 2003-2023†

*(Reality)*

In 2023, 14.6% of students who took the YRBS were overweight.

Increase of 3 percentage points over 20 years

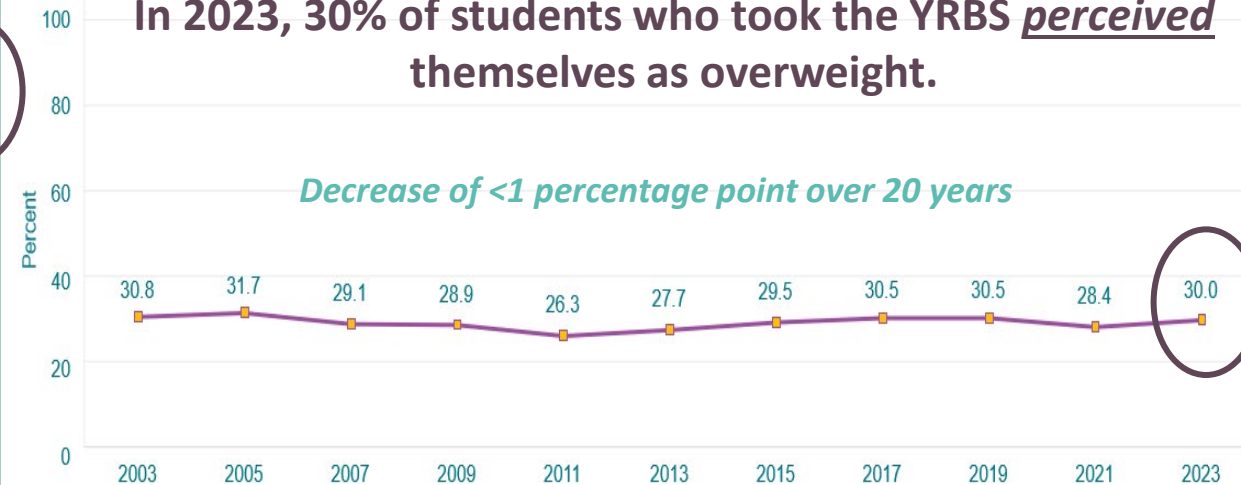


Percentage of High School Students Who Described Themselves As Slightly or Very Overweight, 2003-2023\*

*(Perception)*

In 2023, 30% of students who took the YRBS perceived themselves as overweight.

Decrease of <1 percentage point over 20 years

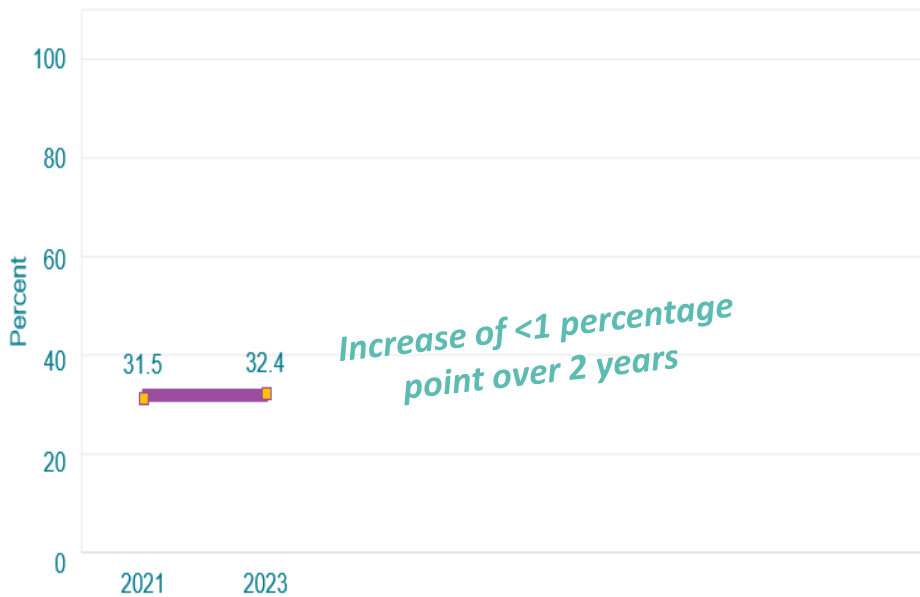


**Takeaway:**

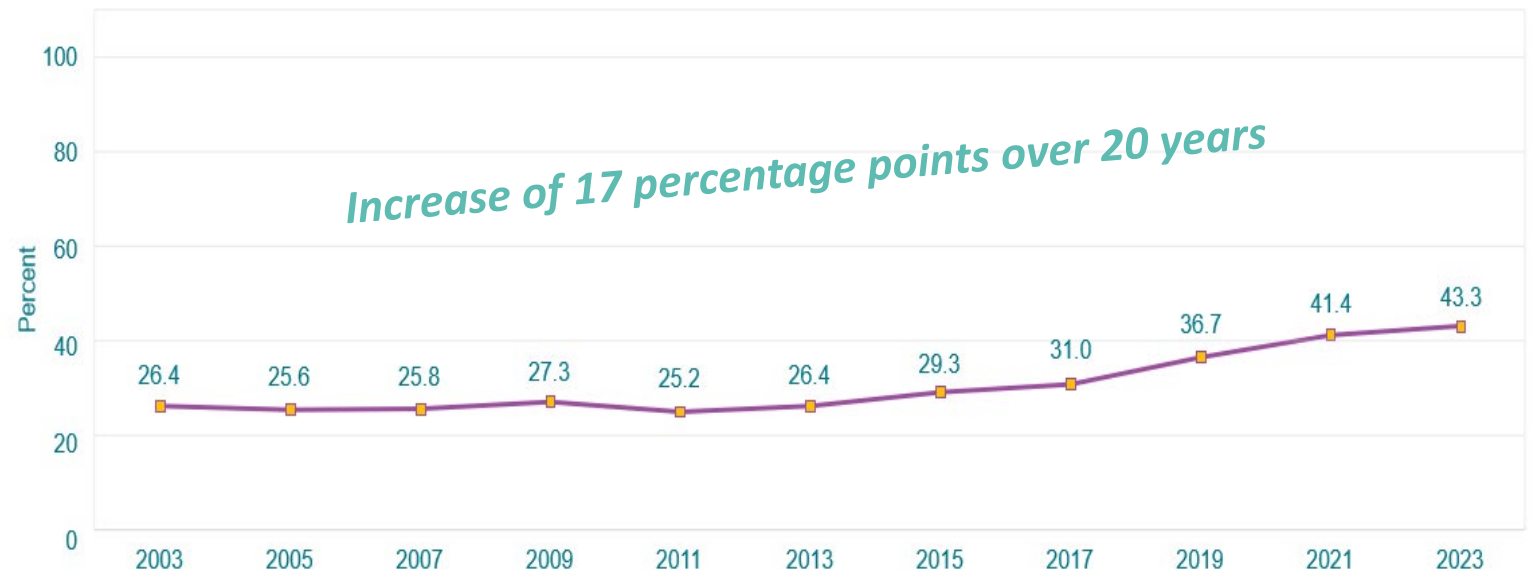
Students tend to have a more negative view of their own weight than what is medically classified as overweight.

# Mental Health as Self-Reported

Percentage of High School Students Who Reported That Their Mental Health Was Most of the Time or Always Not Good,\* 2021-2023†



Percentage of High School Students Who Felt Sad or Hopeless,\* 2003-2023†



**Takeaway:**  
Students increasingly report experiencing sadness, hopelessness, and negative mental health.



YRBS data 1991-2023

OPI webpage: <https://opi.mt.gov/Leadership/Data-Reporting/Youth-Risk-Behavior-Survey>

Note that some questions have been added since data collection began in 1991. Longitudinal analysis covers the entire timespan that each question has been asked on the YRBS.



# Mental Health Subpopulations

## 2023 MONTANA YOUTH RISK BEHAVIOR SURVEY

### MIDDLE SCHOOL STUDENT FREQUENCY DISTRIBUTIONS \* FOR AMERICAN INDIAN STUDENTS ON OR NEAR A RESERVATION

The following frequency distributions are based upon surveys with 637 middle school American Indian students who live on or near a Reservation in Montana during February 2023. Frequency distributions may not total 637 due to nonresponses and percents may not total 100 percent due to rounding.

- 43% of students\* felt so **sad or hopeless** almost every day for two weeks or more in a row that they stopped doing usual activities.
- Students\* reported their **mental health as "not good"** by frequency:
  - Sometimes 24%
  - Most of the time 17%
  - Always 9%
- 62% of students\* reported using **social media** several times a day, with 34% reporting their usage as *multiple times per hour*.
- 26% of students\* reported having eaten **breakfast** every day for the past week.
- 28% of students\* had seriously considered or made a plan to attempt **suicide** in the past 12 months.
- 22% of students\* actually attempted **suicide** in the past 12 months.
- 8% of students\* made a **suicide** attempt in the past 12 months that resulted in an injury, poisoning, or overdose that had to be treated by a doctor or nurse.



## YRBS 2023 data – American Indian middle school students

- OPI YRBS webpage: <https://opi.mt.gov/Leadership/Data-Reporting/Youth-Risk-Behavior-Survey>

data summarized by SFIC staff



# Mental Health Subpopulations

Unintentional Injuries and Violence – percentage of students																	
Were the victim of teasing or name calling because someone thought they were gay, lesbian, or bisexual, past 12 months																	
1993	1995	1997	1999	2001	2003	2005	2007	2009	2011	2013	2015	2017	2019	2021	2023	Linear change	2021-2023 Change
										13.2	14.7	10.7	13.2	14.8	15.6	No change	No change

Felt so sad or hopeless for two or more weeks in a row that they stopped doing some usual activities, past 12 months																	
1993	1995	1997	1999	2001	2003	2005	2007	2009	2011	2013	2015	2017	2019	2021	2023	Linear change	2021-2023 Change
			30.9	41.6	29.9	31.5	34.4	32.0	30.9	31.4	38.6	42.6	39.6	49.0	41.8	↓	↓

Seriously considered attempting suicide, past 12 months																	
1993	1995	1997	1999	2001	2003	2005	2007	2009	2011	2013	2015	2017	2019	2021	2023	Linear change	2021-2023 Change
19.7	18.4	20.3	17.2	28.2	21.0	19.7	20.6	19.5	21.2	23.2	24.3	28.2	26.1	26.7	26.2	No change	No change

Made a plan about how they would attempt suicide, past 12 months																	
1993	1995	1997	1999	2001	2003	2005	2007	2009	2011	2013	2015	2017	2019	2021	2023	Linear change	2021-2023 Change
20.6	19.1	20.1	11.9	23.0	14.5	17.4	15.8	16.6	15.1	19.2	20.6	18.6	20.4	20.7	20.8	No change	No change

Actually attempted suicide, past 12 months																	
1993	1995	1997	1999	2001	2003	2005	2007	2009	2011	2013	2015	2017	2019	2021	2023	Linear change	2021-2023 Change
10.4	11.9	11.5	9.1	20.8	15.5	19.3	16.5	18.1	11.9	15.5	15.6	18.3	15.4	17.6	25.7	↑	↑

More than **double** the % of **all students** who attempted suicide

Among students who attempted suicide, had a suicide attempt that resulted in injury, poisoning, or overdose that required medical treatment, past 12 months																	
1993	1995	1997	1999	2001	2003	2005	2007	2009	2011	2013	2015	2017	2019	2021	2023	Linear change	2021-2023 Change
34.2	32.5	27.3	35.1	35.9	30.6	30.4	34.2	38.3	36.4	32.9	36.0	32.6	36.6	31.7	30.1	No change	↓

YRBS 1993-2023 longitudinal data – **American Indian high school students**

- OPI YRBS webpage: <https://opi.mt.gov/Leadership/Data-Reporting/Youth-Risk-Behavior-Survey>

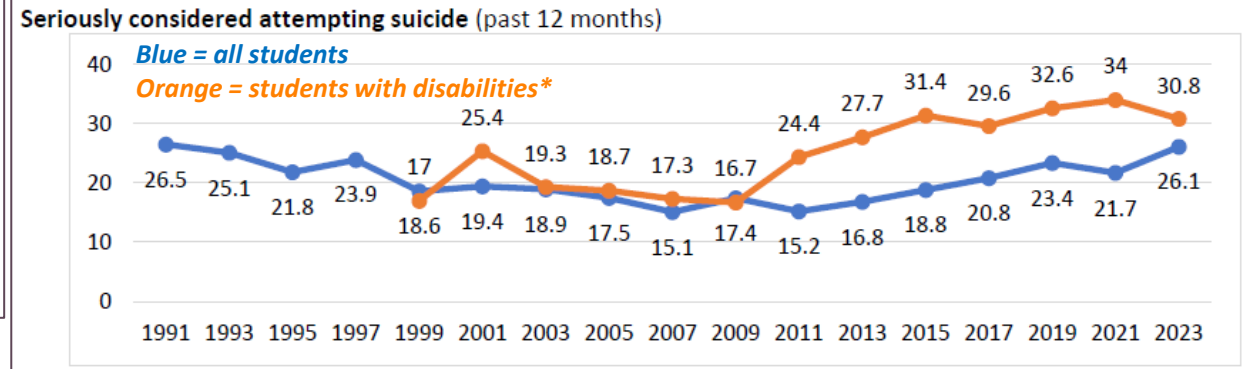
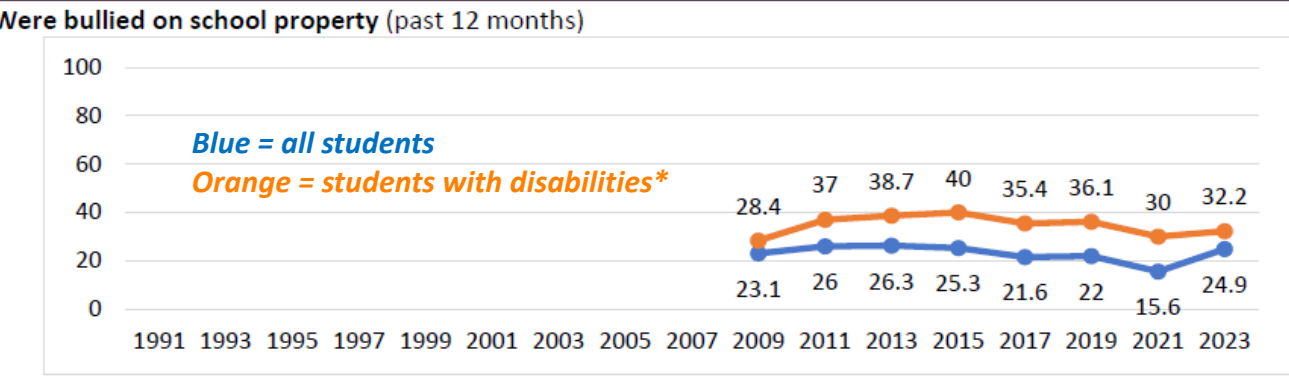
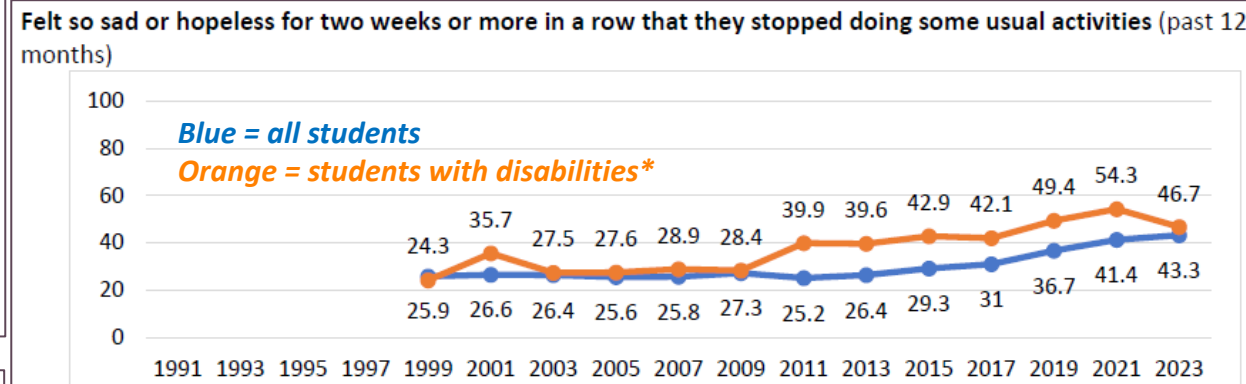
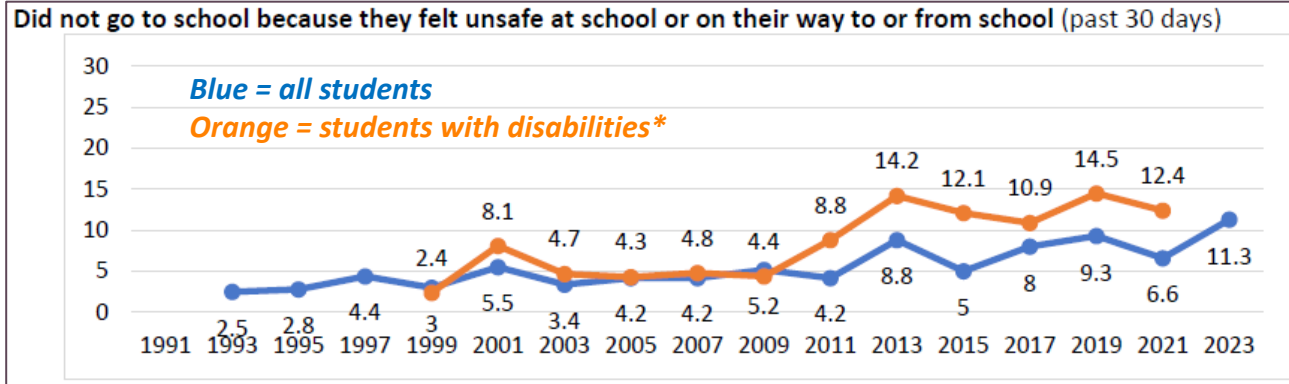


# Mental Health Subpopulations

YRBS 1999-2023 longitudinal data – Students with disabilities\*

\*Based on student responses to YRBS question:

*In the past 12 months, have you received help from a resource teacher, speech therapist, or other special education teacher?*



**Takeaway:**  
Students with disabilities tend to experience higher rates of bullying, hopelessness, and suicidal ideation than their peers.



# Mental Health – Longitudinal Summary

## Downward Trends:

- Students report getting **adequate sleep**, eating **breakfasts** and/or eating **vegetables** at lower rates than in the past.
- Students tend to have a more negative **perception of their own weight** than what is medically classified as overweight.

## Stagnant or Little Change:

- Rates at which students report **being bullied** have remained mostly the same since 2009.
- Rates of **physical activity and screen time** have not changed significantly since YRBS began collecting the data.

## Upward Trends:

- Students increasingly report experiencing **teasing** or **feeling unsafe at school**, or experiencing **sadness, hopelessness, and negative mental health**.
- Students increasingly report considering attempting or **making a plan** to attempt suicide. Data shows a small increase in reported **suicide attempts**, including attempts that result in a **medical visit**.
- There has been a small increase in students experiencing **housing instability** in the few (<6) years since YRBS began collecting this data.

## Subpopulation Highlights:

- **Students with disabilities** tend to experience higher rates of bullying, hopelessness, and suicidal ideation than their peers.
- **American Indian high school students** report attempting suicide at more than double the rate of their peers.





# School Funding Resources:

<https://www.legmt.gov/lfd/publications/school-funding-library/>

## Property Tax Resources:

<https://www.legmt.gov/lfd/publications/property-tax-library/>

## Staff Contact Info:

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Laura Sankey Keip, Legislative Services Division, [laura.sankeykeip@legmt.gov](mailto:laura.sankeykeip@legmt.gov)  
Becca Brown, Legislative Services Division, [rebecca.brown@legmt.gov](mailto:rebecca.brown@legmt.gov)  
Kate Johnson, Legislative Fiscal Division, [katharine.johnson@legmt.gov](mailto:katharine.johnson@legmt.gov)

**Questions?**

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