

SFIC Work Plan (August 25 through January 26)

	Aug 14 PM Zoom only	Sept 15-16 Helena	Sept Road Shows	Oct 14-15 Helena	Oct 16-17 Ed Confs	Nov 13-14 Helena	Dec 15 Zoom only	Jan 13 Zoom only
Phase I: Innovation & Excellence in Education Working Group (IEEWG)								
Develop understanding of international comparisons, benchmarking, gap analysis	NCEE intro and overview of work							
NCEE-facilitated Road Shows/Outreach to educators, parents, students, business community (not full Commission/IEEWG)			Kalispell Havre Billings		Ed Confs Missoula Helena			
Reports back from outreach, develop IEEWG recommendations, implementation plan, cost estimates				Develop recs and plan		Feedback from Ed Confs Refine recs and plan	Further refinements Review draft report	
Finalize and Publish IEEWG report by Jan. 31, 2026								Finalize report
Phase II: School Funding Formula Analysis and Recommendations								
Develop understanding of Montana's current funding formula, litigation history, issues with current formula	NCSL Principles Hist Background Defining equity and adequacy	Dist Rev Big Pic Dist Gen Fund 20-9-309 Xwalk		Gen fund PPR Equalization and Mill rates Sp Ed basics Tuition Fund		LAD update Facilities 101 RFI update	Phase II Planning	RFP update Feb outline Funding training (if time)

SFIC Work Plan (Phase II only; working draft for review/discussion/modification at April 7-8 meeting)

	CALENDAR YEAR 2026				
	Jan 13 Zoom only	Feb 11-12 Helena	April 7-8 Helena	June 17-18 Helena	Aug 12-13 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 Feb outline Funding training (if time)	All funds overview Dist GF deep dive Inflation Analysis Sp Ed - high-cost IEPs Facilities needs English Learners Mental Health Cost of living Levy passage rates	APA analysis of MT formula and comparison with other states Further explore identified issues with current formula	Further explore identified issues with current formula as directed by the Commission Examine revenue? Countywide BASE change? HB 483 changes?	Follow-up as needed
Conduct consultant-advised cost study using successful schools methodology		Intro APA Overview methodology Define successful school	Study update and discussion Commission direction as needed	Study results Consultant analysis Discuss findings	Follow-up as needed
Analyze alignment of IEEWG recommendations and existing funding formula; consider changes			Staff and NCEE analysis NCEE Latest Learnings Commission discussion	Follow-up as needed	Follow-up as needed
Develop SFIC findings, recommendations, draft legislation incorporating public comment			Workshop potential findings and recs Discuss potential legislation	Follow-up as needed Refine findings and recs Review potential legislation	Follow-up as needed
Finalize and Publish SFIC report by Sept. 1, 2026					Provide draft report in advance Public comment Commission revision and approval