



9.20.2023 Agenda Regular Meeting of Trustees

The regular meeting of the Board of Trustees of School District #35 has been scheduled for **Wednesday, September 20, 2023 at 6:00 P.M. in the library and via Zoom.**

Call to Order

Pledge of Allegiance

Presiding Trustee's Explanation of Procedures

Public Comment- Non Agenda Items

Consent Agenda

Minutes: 8.15.2023-Regular Meeting, 9.1.2023-Special Meeting and 9.6.2023-Special Meeting; **Finance:** Warrants; Operational Budget by Object Code; Cash Reconciliation; Extra-Curricular Expenditure and Reconciliation Report; **Personnel:** Personnel Resolution

Superintendent Report

District Clerk-Business Manager Report

Old Business

Discussion Items:

Governing Board Committees

Action Items:

Discuss & Consider Security Technology

Discuss & Consider Trustee's Financial Summary for 2022-2023 Fiscal Year

Discuss & Consider Budget for 2023-2024 Fiscal Year

Discuss & Consider Policy Series 1000 - 2nd reading

New Business

Action Items:

Schedule Superintendent's Evaluation

Schedule Annual Facility Walkthrough

RFP: Owners Rep

Homeschool Student request to play athletics

Policy Series 7000 Financial Management - First Reading

Next Meeting:

October 4, 2023 Work Study Session Policy Series 7000 Financial Management

October 6, 2023 Agenda Planning Session

October 18, 2023 Regular Board Meeting

Recessed Until A Later Posted Date

The Core Purpose of Gallatin Gateway School is to embrace an engaging learning culture in a safe, nurturing environment where each student thrives now and into the future.

Excerpt from GGS Policy #1441- Audience Participation

Audience Participation

The Board recognizes the value of public comment on educational issues and the importance of involving members of the public in its meetings. The Board also recognizes the statutory and constitutional rights of the public to participate in governmental operations. To allow fair and orderly expression of public comments, the Board will permit public participation through oral or written comments during the “public comment” section of the Board agenda and prior to a final decision on a matter of significant interest to the public. The Chairperson may control such comments to ensure an orderly progression of the meeting.

Individuals wishing to be heard by the Chairperson shall first be recognized by the Chairperson. Individuals, after identifying themselves, will proceed to make comments as briefly as the subject permits. The Chairperson may interrupt or terminate an individual’s statement when appropriate, including when statements are out of order, too lengthy, personally directed, abusive, obscene, or irrelevant. The Board as a whole shall have the final decision in determining the appropriateness of all such rulings. It is important for all participants to remember that Board meetings are held in public but are not public meetings. Members of the public shall be recognized and allowed input during the meeting, at the discretion of the Chairperson.

Cross Reference: 1420 School Board Meeting Procedure

Legal Reference: Article II, Section 8, Montana Constitution – Right of participation
Article II, Section 10, Montana Constitution – Right of privacy
§§ 2-3-101, et seq., MCA Notice and Opportunity to Be Heard

Zoom procedures:

1. *Login details are on the district website -- [See District Calendar](#)*
2. *Please ensure your mic is muted until called upon by the Chair*
3. *Public Comment is accepted two times during the meeting:*
 - a. *During non-agenda public comment for items not on the agenda*
 - b. *When the Chair opens it for public comment as determined appropriate*
4. *To participate from a mobile device or computer:*
 - a. *Please use the “Raise Hand” button under “Participants” button at the bottom of your screen*
 - b. *Once called on please unmute yourself to provide comments*
5. *To participate from a phone when dialed in:*
 - a. **9 to raise and lower hand for public comment*
 - b. *Once called on please press *6 to unmute yourself to provide comment*



**8.15.2023 MINUTES
REGULAR MEETING
BOARD OF TRUSTEES, GALLATIN GATEWAY SCHOOL DISTRICT #35**

CALL TO ORDER

The Board of Trustees of the Gallatin Gateway School District #35 met at 6:00 P.M. on August 15, 2023, in the Gallatin Gateway School Board Room and via Zoom. Board Chair Aaron Schwieterman presided and called the meeting to order at 6:07 P.M.

TRUSTEES PRESENT

Aaron Schwieterman, Board Chair; Mary Thurber, Vice Chair; Carissa Paulson, Tim Melton

TRUSTEES ABSENT

Brian Nickolay

STAFF PRESENT

Kelly Henderson, Superintendent; Brittney Bateman, District Clerk

OTHERS PRESENT

Lain Kay

PLEDGE OF ALLEGIANCE

The meeting attendees recited the *Pledge of Allegiance*.

PRESIDING TRUSTEE'S EXPLANATION OF PROCEDURES

Board Chair Aaron Schwieterman explained the public comment process to be followed for addressing the Board in accordance with Gallatin Gateway School policy. She noted: 1) that prior to a vote the public may comment on agenda items; 2) there will be time for public comment on non-agenda items; 3) public comment periods are not intended to be a question and answer session.

PUBLIC COMMENT ON NON-AGENDA ITEMS

Lain Kay wished to speak to the board about the music program for the 2023-2024 school year. Every year, she donates \$2,000.00 to the school district to go towards helping pay for the music program and the swimming lessons in the spring. Ms. Kay expressed her thoughts about making 5th grade band a requirement, so students are exposed to music. She feels that if students take music at an early age in middle school, they will be prepared to play music in high school.

CONSENT AGENDA

Motion: Trustee Paulson to approve the consent agenda as presented. **Minutes:** 6.21.2023-Regular Meeting and 8.3.2023-Special Meeting; **Finance:** Warrants; Operational Budget by Object Code; Cash

Reconciliation; Extra-Curricular Expenditure and Reconciliation Report; **Personnel:** Personnel Resolution
Seconded: Trustee Melton
Public Comment: None
For: Schwieterman, Thurber, Paulson, Melton
Opposed: None
Motion passed unanimously 4-0

SUPERINTENDENT REPORT

Superintendent Kelly Henderson gave the Board an update regarding what happened over the last month in the district. A few of the items discussed include: 1) update on policies and changes made; 2) 4 paid weeks for teachers to work on curriculum; 3) staff PIR next week

DISTRICT CLERK REPORT

District Clerk Brittney Bateman gave the Board an update regarding what happened over the last month in the district. A few of the items discussed include: 1) MT DOJ fingerprinting certification; 2) health insurance switchover; 3) food service menus; 4) facilities work

OLD BUSINESS

Discussion Items:

Board Activities - B2School, NTO, Open House, Back to School BBQ

New Teacher Orientation - August 16-17 from 8a-4p. The board is providing lunch.

Back to School PIR Week - August 21-25 from 8a-4p. The board is providing breakfast.

Open House - August 24 from 5:30-7p

Back to School BBQ - August 22 at Neal Krogstad's home

Action Items:

Discuss and Consider Board Goals

The Board Goals were developed at a Work Study Session with Deborah Silk, November 2022.

Goals of the Gallatin Gateway School

Goal Area 1: Individual Student Success

Statement of Intended Outcome, Five years: We have successfully enhanced our expectations of students, the exposure of our students to learning opportunities, and our individualized approach to education. As a result, our students are literate and enthused about their education, are enjoying their experiences, and are thriving.

Goal Area 2: Facilities

Statement of Intended Outcome, Five Years: We have successfully integrated environmentally friendly initiatives into our school and enhanced the current and future use and efficiency of our facilities to ensure that our school meets the contemporary needs of our students, staff and the community we serve.

Goal Area 3: Staff and Volunteers

Statement of Intended Outcome, Five years: Our staff are highly valued and supported and because of our positive work environment, our staff flourish in their respective positions. Our staff, with our volunteers, collaborate in a cohesive manner that fully supports the individual needs of our students. Our staff and volunteers have positively impacted each student enrolled in our school.

Goal Area 4: Leadership, Communication and Collaboration

Statement of Intended Outcome, Five Years: Leadership roles have been articulated and enhanced resulting in quality and effective communications and collaboration with parents, staff and the

community. Through our efforts, we now operate in a cohesive manner that has significantly improved our District operations, programs and services and enhanced individual student success.

Goal Area 5: Safety

Statement of Intended Outcome, Five Years: We have enhanced the safety and security of our facilities to minimize the risk and harm to our students and staff in the event of a safety or security breach. We have effectively enhanced our emotional support services for students.

Motion: Trustee Thurber to approve the board goals for the 2023-2024 school year.

Seconded: Trustee Melton

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Discuss and Consider Superintendent Goals

The Superintendent goals were developed during the 2022-2023 school year in conjunction with the strategic plan review and update.

Motion: Trustee Melton to approve the Superintendent's Goals for the 2023-2024 school year.

Seconded: Trustee Thurber

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

2nd Reading Legislative Changes

MTSBA has provided us with the updated model policies for the changes made during the 2023 Legislative Session.

Motion: Trustee Paulson to approve the model policy changes on the second reading.

Seconded: Trustee Thurber

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

NEW BUSINESS

Action Items:

Discuss & Consider Trustee's Financial Summary for 2022-2023 Fiscal Year

Due to recent events, the Trustee's Financial Summary is not completed. The auditor has been contacted to see if there is an option to have someone from their office help the district in the interim. The Office of Public Instruction has been made aware of the situation the district is in. This topic was tabled to a later meeting.

Discuss & Consider Budget for 2023-2024 Fiscal Year

Due to recent events, the Budget for the 2023-2024 fiscal year is not completed. The auditor has been contacted to see if there is an option to have someone from their office help the district in the interim. The Office of Public Instruction has been made aware of the situation the district is in. This topic was tabled to a later meeting.

Approval of the Transportation Routes for 2023-2024 School Year

Each year, the board, as well as the Gallatin County Transportation Committee, approves the bus routes for the school year. The bus routes have already been presented and approved by the Committee. The bus routes will be changed and reapproved once the school year starts and all the students are registered for the bus.

Motion: Trustee Melton to approve the presented bus routes for the 2023-2024 school year.

Seconded: Trustee Paulson

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Discuss & Consider 2021-2022 Audit Findings

Each year, the school district has to have a financial audit. This is completed by Denning, Downey and Associates. The Audit Report is included in this board book.

Motion: Trustee Melton to approve the audit report and its include findings.

Seconded: Trustee Thurber

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Discuss & Consider Out of District Attendance Agreement

We received one (1) new out of district enrollment request.

Grade	Status (new student or current student)	Home School District	Tuition
K	New	Harrison	\$0

Motion: Trustee Melton to approve the following one (1) Discretionary Non-resident Student Attendance Agreements for the 2023-2024 school year.

Seconded: Trustee Paulson

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Governing Board Appointments for Title X, IX, VI, Gallatin-Madison SPED Cooperative, Transportation Committee

Each year, the board appoints one staff member to committees to work on school related things. The committees meet and bring recommendations to the school board for approval.

Motion: Trustee Melton to approve of the Board appointments:

Title X (Family Planning/Health) - Counselor

Title IX (Discrimination) - Human Resources

Title VI (Civil Rights) - Human Resources

Gallatin-Madison SPED Cooperative - Superintendent

Transportation - District Clerk

Seconded: Trustee Thurber

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Governing Board Committee Assignments - Whole Child, Safety, PDAC, Facilities

Each year, the board appoints one trustee to a committee that is composed of teachers, staff, community members and parents.

Motion: Trustee Melton to approve the following Governing Board assignments for the 2023-2024 school year:

- Whole Child - Mary Thurber
- Safety - Brian Nickolay
- PDAC - Carissa Paulson
- Facilities - Aaron Schwieterman and Tim Melton

Seconded: Trustee Paulson

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Approval of MFPE MOA Staffing Shortage - Teacher Compensation for Substitute Needs

Last school year 2022-2023, the Governing Board agreed to a Memorandum of Agreement (MOA) with MFPE to compensate teachers. The purpose of the MOA is to compensate certified teachers who are teaching classes during their preparation time or supervising recess during their duty-free lunch period. The district is still experiencing a significant lack of substitute support for staff out of the building due to illness, appointments, or other absences. The agreement needed to be renewed for this school year.

Motion: Trustee Melton to approve of the process and procedures to compensate teachers for missed duty free lunch and preparation periods for the 2023-2024 school year to include compensation for staff from the beginning of the school year.

Seconded: Trustee Thurber

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Discuss & Consider Approved List of District Check Signers

Each year the district reapproves a list of check signers due to incoming and outgoing trustees.

Motion: Trustee Melton to approve the check signers for the 2023-2024 fiscal year:

- Aaron Schwieterman
- Mary Thurber
- Carissa Paulson
- Tim Melton
- Brian Nickolay
- Kelly Henderson
- Brittney Bateman

Seconded: Trustee Thurber

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Adjustment to Food Service Manager Salary

With the 3% increase in pay approved by the board in June, the assistant cook will make \$16.48 per hour. Our kitchen manager's salary is \$30,900.00 for the year. That makes her hourly rate \$14.86. The national average for this position is \$23 and the Montana average is \$20 an hour.

Motion: Trustee Melton to approve the correction to the pay for the Kitchen Manager from \$30,900 to \$41,600.00 for the 2023-2024 school year.

Seconded: Trustee Thurber

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Discuss and Consider Emergency Management Plan and Flip Charts

It is customary for school districts to adopt emergency management plans to ensure there is uniformity in the case of a disaster or emergency. There will be a print out, as well as flip charts in every emergency backpack located in each room in the building.

Motion: Trustee Melton to approve the Emergency Management Plan and Flip Charts.

Seconded: Trustee Paulson

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Handbook/Guide Approvals

The administration team has written the following guides and handbooks to help the employees have resources to find information.

Motion: Trustee Paulson to approve the presented handbooks and guides:

Athletic

Staff

Student-Parent

504

Assessment

Behavior

Curriculum and Instruction

Classroom Management

MTSS

Human Resources

Title IX

Seconded: Trustee Melton

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Resolution to dispose of abandoned, obsolete, and undesirable property - 20-6-604, MCA

When a district has property they no longer need for instruction, 20-6-604, MCA allows districts to sell or otherwise dispose of property.

Motion: Trustee Melton to approve of the resolution to dispose of abandoned, obsolete, and undesirable property and for the money from the sale be deposited into the general fund.

Seconded: Trustee Thurber

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton
Opposed: None
Motion passed unanimously 4-0

Transfer of Duties: Business Manager

It is typical to have the District Clerk have the duties of the Business Manager. We are proposing to have Brittney Bateman assume the position of and duties of the Business Manager and to increase her salary to \$70,000 from \$63,000. We are proposing to hire an secretary to handle the secretarial tasks associated with the positions Mrs. Bateman holds (transportation, food service, human resources, adult education). With the proposed salary (\$70,000) of this position and the secretarial wages (\$16.48 an hour/\$22,448), we will stay within the budgeted salary and benefits for the two positions for the 23-24 school year.

Motion: Trustee Thurber to approve the transferring of duties of the Business Manager to the District Clerk and increasing the salary of the position to \$70,000.

Seconded: Trustee Melton

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Administrative Assistant to District Clerk-Business Manager

This position is an existing classified position that the district did not hire for the 22-23 school year. With the combination of the Business Manager and District Clerk position, this position would assist with data entry, secretarial duties focusing on food service, transportation, adult education, and human resources. The position is for 7 hours daily at the rate of pay of \$16.48.

Motion: Trustee Melton to approve the of the reinstatement of the Administrative Assistant position.

Seconded: Trustee Paulson

Public Comment: None

For: Schwieterman, Thurber, Paulson, Melton

Opposed: None

Motion passed unanimously 4-0

Next Meetings:

- Special Meeting - September 1, 2023 at 10:00 A.M. - Agenda Setting
- Special Meeting - September 6, 2023 at 1:00 P.M.
- Regular Meeting- September 20, 2023 at 6:00 P.M.

ADJOURNMENT

Board Chair Aaron Schwieterman recessed the meeting at 7:34 P.M.

Aaron Schwieterman, Board Chair

Brittney Bateman, District Clerk



9.1.2023 Minutes Special Meeting of Trustees

The special meeting of the Board of Trustees of School District #35 has been scheduled for **September 1, 2023 at 10:00 A.M. in the library.**

Call to Order - *the meeting was called to order at 10:00am by [Aaron Schwieterman](#). In attendance were [Aaron Schwieterman](#), [Mary Thurber](#), and Kelly Henderson.*

Public Comment - Non Agenda Items *there were no requests for public comment.*

New Business

Setting Agenda for Regular Board Meeting - *the board reviewed the agenda items for the September 20th regular board meeting.*

Next Meetings:

Regular Meeting - September 20, 2023 @ 6 pm

Adjournment *The meeting was adjourned at 10:25am.*

The Core Purpose of Gallatin Gateway School is to embrace an engaging learning culture in a safe, nurturing environment where each student thrives now and into the future.



9.6.2023 Minutes Special Meeting of Trustees

The special meeting of the Board of Trustees of School District #35 has been scheduled for **September 6, 2023 at 1:00 P.M. in the library.**

Call to Order *The meeting was called to order at 1:05. In attendance were [Aaron Schwieterman](#), [Mary Thurber](#), [Carissa Paulson](#), [Tim Melton](#), [Brian Nickolay](#), [Kelly Henderson](#), [Brittney Bateman](#), and Guest [Debra Silk](#).*

Public Comment - Non Agenda Items *There were no public comments submitted to the Board.*

New Business

Board Work Study Session with Debra Silk, MTSBA

Orientation

- *Mrs. Silk reviewed a brief Board Member Orientation with the Governing Board.*
 - *Responding and Reporting complaints: The board discussed how they will handle complaints. The board member will let the person know of the proper reporting method for general complaints and formal complaints.*
 - *The board member will email the superintendent and cc: the board chair to report the concern.*
 - *The superintendent will complete any needed steps to address the concern and follow up with the board in the weekly update email.*
 - *The board discussed volunteering and working in the district.*

Policy Series 1000 Review

The board completed a review of Policy Series 1000 for the first reading.

Adjournment *The meeting was adjourned at 3:05pm.*

Superintendent's Report

September 20, 2023



Strategic Goals

Individual Student Success

- Special Education students - 12
- Students with 504's - 13
- Check In/Check Out - 4 students
- No behavior incidents to date

Staff and Volunteers

- Classified staff meeting - intervention program, staff evaluation recess and lunch issues and needs
- Started goal setting and observations for staff on 9-19-2023
- PLC meeting topics: Accommodations/Modifications for 504/IEP needs, the next two weeks is Teaming/PLC time to work on intervention/enrichment, completed the EPAS training for staff.

Facilities

- Completed the re-numbering of rooms

Enrollment Summary:

We enrolled two new students on Friday September 15, 2023 (not included below).

Enrollment Summary				
Grade	Total	Boys	Girls	OD
K#1	10	6	4	4
K#2	10	3	7	1
1	15	6	9	5
2	11	5	6	0
3	16	10	6	3
4	10	7	3	2
5	13	5	8	2

6	18	10	8	4
7	13	7	6	2
8	13	6	7	2
Total:	129	7	6	25
Enrollment as of:		<i>9/13/2023</i>		

Transfers In/Out

In: We have 8 new students since school started

Out:

14 Students moved (either in state or out of state)

3 Students are homeschooling due to social issues/anxiety

3 Students attending Private School

1 Student Unknown

3 Students Attending District of Residence

Summer and Back to School Days

The certified staff had the option of working 20 additional days this summer (2 weeks in June and 2 weeks in August) to align their curriculum resources with the standards. Thank you so much for coming for breakfast with all the staff and lunch with our new teachers. We appreciated having you be present with us.

Monday - Day 1 Operations Day

- Manuals
 - 504 Manual: Coordinator – Missy Schultz
 - Assessment Plan: Keeper of the Plan – Amanda McClish
 - Athletic Handbook: Athletic Director – Erica Clark;
 - Review attendance and academic requirements
 - Behavior Expectations/Behavior Matrix
 - C & I Guide/Standards based instruction/Standards based grading
 - Classroom Management
 - ELL Guide: Assessment – Missy Schultz, Instructional Planning – Kelly Henderson
 - HR Handbook: HR is Brittney Bateman & Kelly Henderson
 - Mentoring Handbook
 - MTSS Handbook
 - Staff Handbook

- Student-Parent Handbook
- Title IX Handbook
- Volunteer Handbook
- Wellness Plan
- Master Agreement
- Office Procedures and Information
- Disclosure Agreements information available in the Mentor Handbook and the Staff Handbook [District Handbooks](#). Please have these available for an open house.
- Tour of the Facilities/Walls/Attic/Basement/Storage

Tuesday Day 2

Emergency Management

- 8:00-9:30a
 - Plan [District Handbooks](#)
 - Flip Chart [District Handbooks](#)
 - Back Packs
 - Drills – we are going to have different drills this year that are NOT going to be announced.
 - Catapult (Erica)

9:30a-12p Active Intruder Training (This is the classroom portion only. We will be completing the defensive tactics at another time.)

1-2:30p Suicide Prevention Training - Missy

Wednesday Day Three

Classroom and Behavior Management

8:00-11:30am Classroom Management/Behavior Management Guides [District Handbooks](#)

- De-Escalation Strategies [23-24 PIR](#)
- Trauma Informed and Restorative Practices – ACES Information [23-24 PIR](#)

Processes and Procedures

Teaching of Controversial Issues - parent notification and curriculum resource reviews

Discipline Matrix – when do I send a student to the office?

12:15-4:00pm

Expectations for the first two weeks of school:

- Relationship Building
- Study Skills Basics

- Technology Use – Discuss Bark, Hapara, Digital Citizenship
- Processes/Procedures
- Expectations for Learning – keep your expectations high for students. Convey this to them.
- Student Behavior/Dress Code

Expectations for the last two weeks of school:

- Field Trips
- Instruction
- Classroom Clean Up

Instruction/Curriculum

- Assessment Calendar
- Assessment Data Tracking Tool
- Writing Expectations
- Indian Education for All – Ashley- [Essential Understandings](#) Document
- Special Education - Maddie D

MTSS [District Handbooks](#)

- Intervention
- MTSS Team
- Behavior
- Title I
- Processes/Procedures
- Student Data Analysis and Watch List [Assessment Data](#)
- Watch List Student Plan [Watchlist Student Form](#)

Study Skills [Study Skills Materials](#)

Thursday Day Four

Student Data

8:00-10:00a	Continuation of Data Conversation and collaboration
8:30-9:30a	Classified staff meeting in the Library
10:00-11:30a	Intervention/Instructional Planning for Watch List students. Do we have students that could benefit from acceleration or lower grade instruction?

Technology and Programs

12:30-4:00p	Technology and Programs (Mike/Kelly)
<i>Technology</i>	Chromebook check out
	Color Printer
	Care and Cleaning of Chromebooks
	Chromebook Inventory

Program Resources User Manuals and information on the programs below can be found in the GGS Staff Team Drive under [23-24 Curriculum Planning](#)– Program Resources.

**In parentheses are the names of the experts.

- IXL (Mike)
- Waterford (K-2) (Neal, Maddy H)
- Renaissance (Kelly)
- Easy CBM (Kelly)
- Write Right Now (Kelly)
- SAVVAS (Kelly)
- Hapara (Ashley)
- Bridges Education (Mathematics)
- McGraw Hill - Social Studies (Ashley)
- Big Brains (Mike)

This is required for students in grades K-5 for math fact practice. Big Brains gives us data to track the progress for students with computation.

Smarter Balanced (Kelly, Mike, Ashley) Tide, Online training, FIAB's in Teacher Tools (C & I document has more information about Teacher Tools in SBAC.

Whitelist updates – if there are websites that you would like your students to have access to for instruction, please complete this form: [Whitelist Request List](#) If you are requesting a website and it is an emergency – please send me an email or come talk to me.

5:00 pm Title I Parent Meeting

5:00 pm Fall Sports Meeting

5:30 pm – 7pm Open House

Day Five Friday – Staff Meeting

District Committees

Governing Board Led:

- Whole Child: Lilly Thorstad, Schultz, Mariel Warren, Barnes,
- Facilities- Mike Coon, Madeline
- Safety- Schultz and Ashley Davis, Carly James, Margaret Campbell, Paige Schladetsch
- PDAC-Maddie D, Neal, Jacki, Maddy H, Amanda McClish
- Audit - none for this year

School Led:

- Sunshine: Amanda McClish Margaret Campbell,,Connie Beery, Schultz

- Staff Wellness: Lilly Thorstad, Maddie D., Mariel Warren, Maddy H, Paige Schladetsch
- Foundation Rep: Neal
- MTSS- Madeline , Amanda
- Athletics/Activities (Fees, Booster Club, Fundraising) Amanda McClish
- Risk Assessment Team (Policy 3310P1) team shall include individuals with expertise in human resources, education, school administration, mental health, and law enforcement.
- Emergency Response Team
- Post Incident Response Team-Maddie D., Carly James, Barnes
- Technology Cyber Response Team Spencer Kirkemo
- Negotiations (MFPE) contact Mike Coon,

Stuff:

1. October MFPE deadline for submitting alternative offerings is September 29th. MFPE Educators Days are October 19-20th. (MFPE = Montana Federation of Public Employees)
2. Search and Seizures Procedure:

School authorities are authorized to utilize any reasonable means of conducting searches that includes but is not limited to a pat down of the exterior of students clothing, pockets, objects/containers used or owned by students or in their possession, devices or tools identified in school district policy or the student handbook or deemed necessary by the superintendent.

- The search can only be conducted by a school official or designee.
- The search should be done in private, not in front of other students or adults.
- A witness must be present of the same gender
- Parents will be contacted immediately following a search with written documentation provided.
- The superintendent is notified immediately.

3. Food in the Classroom
Share with parents the importance of healthy snacks and meals
4. Procedures - who's doing what? 6-8 doing together
 - a. Lining up for recess/coming home
 - b. Boot barn (boots/snow pants) - process for setting up
5. Flag Ceremony - playing instrument, whole school pledge of allegiance, star spangled banner @8:15am
6. Study Skills Document
7. Cell phones and hats
 - a. K-2 no hats
 - b. 3-8 okay but abuse - lose it - advertise

- c. Cell phones - have them use them in class with teacher permission, away other times, leave the cell when they go to the bathroom, other than that none, use guest network for students using cells, no headphones unless permission, be clear about why you are on your phones, use it right or lose it
 - d. Smart watches - in their locker not during class
- 8. Bond information – best public relations, go to events, talk positively about our school and colleagues
- 9. Inventory Training – bar codes and board approval
<https://gallatingateway.goalexandria.com/tt-dashboard> Username: inventory (or you each have your own...let me know if you want to use that instead) Password: Gators1234!
- 10. Student Recognition monthly drawings, quarterly other ideas or keep to the end of the year?
 - a. Caught you being good cards - weekly on the intercom and at the end of the quarter have an assembly for rewards instead of at the end of the year
 - b. Get a book vending machine
- 11. Book Vending Machine: We've historically given a token for a book from the vending machine for Accelerated Reader rewards. Can we scrap that and use the book vending machine for a birthday prize for every student? Do you have other ideas? Birthdays, Caught you being good, K-2 reading charts
- 12. Custodial convo
 - a. email him with needs
 - b. vacuuming - schedule so that we can stack chairs, garbage outside the classroom door
 - c. during prep - okay except when Missy is in there one time weekly
- 13. Time Card approval – Time cards must be submitted on the last day of each month. Please make sure you do that.
- 14. Stipend Form – please complete the stipend form for any of your extra-curricular duties and turn that into me by next Friday. You will receive compensation at the end of your event instead of monthly.
- 15. Duty Schedule

Old Business
DISCUSSION ITEM

Governing Board Committees

Presented by: Aaron Schwieterman/Kelly Henderson

Background (to include funding source if applicable):
Staff Volunteers for Committees:

Facilities	Whole Child	PDAC	Safety
Aaron Schwieterman	Mary Thurber	Carissa Paulson	Brian Nickolay
Tim Melton	Kelly Henderson	Kelly Henderson	Kelly Henderson
Kelly Henderson	Lilly Thorstad	Maddie Downs	Missy Schultz
Brittney Bateman	Missy Schultz	Neal Krogstad	Ashley Davis
Mike Coon	Mariel Warren	Jacki Yager	Carly James
Madeline Barry	Nickie Barnes	Maddy Herron	Margaret Campbell
Miranda Johnson	Erica Clark	Amanda McClish	Paige Schladetsch
Vacant: Parent	Spencer Kirkemo		Vacant: Parent
Vacant: Community	Melissa Melton		Vacant: Parent
Vacant: Community	Vacant: Parent		

Please let me know when you want to have a meeting. I'll be assisting you in scheduling with Mrs. Bateman posting the meetings.

Old Business
ACTION ITEM

Security Technology

Presented by: Kelly Henderson, Mary Thurber, Mike Coon

Background (to include funding source if applicable):

Proposals for TEST, SHI, and Systems Northwest are included in the Board Packet.

Recommendation: Administration recommends the approval of the TEST proposal for \$75,879.99 which includes equipment and installation.

Proposal



Serving all of Montana

To: Gallatin Gateway School

Attn: Mike Coon

Date: 8/2/2023

Regarding: Proposal to replace existing security camera system with Digital Watchdog system.

Upgrade Existing System Scope of Work: Systems Northwest will provide labor and materials to replace the existing security camera system with a new Digital Watchdog camera system. SNW will install a 32TB NVR with Digital Watchdog Spectrum Software installed. This will provide the customer with at least 30 days of video storage, and special features and analytics.

As a cost savings to the customer, Systems Northwest will reuse all twenty-seven (27) existing cameras, load camera licenses, and perform programming and setup. Also, SNW will reuse all existing PoE Switches for connectivity. As long as all cameras are OnVIF compliant they should work and talk with the new system. If a camera doesn't work, it can be replaced at a cost over and above this proposal.

SYSTEMS NORTHWEST TOTAL PRICE ----- **\$20,732.00**

Additional Outdoor Cameras Scope of Work: Systems Northwest will provide labor and materials to install two (2) additional cameras on the outside of the building. One camera will be mounted in the corner outside the boiler room to view the playground. The other camera will be mounted outside the library to view that side of the building. This camera will have a wide-angle field of view. SNW will provide and pull cabling, mounts, make connections to the newly installed Digital Watchdog NVR and perform programming.

SYSTEMS NORTHWEST TOTAL PRICE ----- **\$4,293.00**

Additional Indoor Cameras Scope of Work: Systems Northwest will provide labor and materials to install a total of six (6) additional cameras. One camera will be mounted in the gymnasium. This camera will be on a wall mount in the far NE corner. The other five (5) cameras will be mounted in the drop-tile ceiling in various hallway locations found on the attached floor plans. SNW will provide and pull cabling, mount cameras, make connections to the newly installed Digital Watchdog NVR and perform programming.

SYSTEMS NORTHWEST TOTAL PRICE ----- **\$10,060.00**

SYSTEMS NORTHWEST TOTAL PROJECT PRICE ----- **\$35,085.00**

Quotation Notes:

- Customer to supply PoE Ports for all camera locations.
- Work to be completed during normal business hours.
- If required, customer to complete patch and painting work.
- Customer to provide network connection for connectivity.
- Pricing includes materials, wire, connectors, installation, programming, testing and owner training.
- If required, owner to supply and install all required 120VAC power.
- Customer to provide access to all areas of work.
- Proposal does not include any asbestos dust abatement control that may be required. This will be the responsibility of owner or third party and will be completed at a cost over and above this proposal.

Proposal



Serving all of Montana

If not approved within 30 days from the date of the proposal, pricing is subject to change due to manufacturer and/or supplier's periodic price increases.

If our proposal is accepted, please circle price values for materials and/or labor needed, sign, date and return by email to tony@snwmt.com, or fax to 406-756-1700.

Date Accepted _____

Company Name _____

Company Representative _____

Respectfully,

A handwritten signature in black ink that reads "Tony Kushner". The signature is fluid and cursive, with a long horizontal stroke at the end.

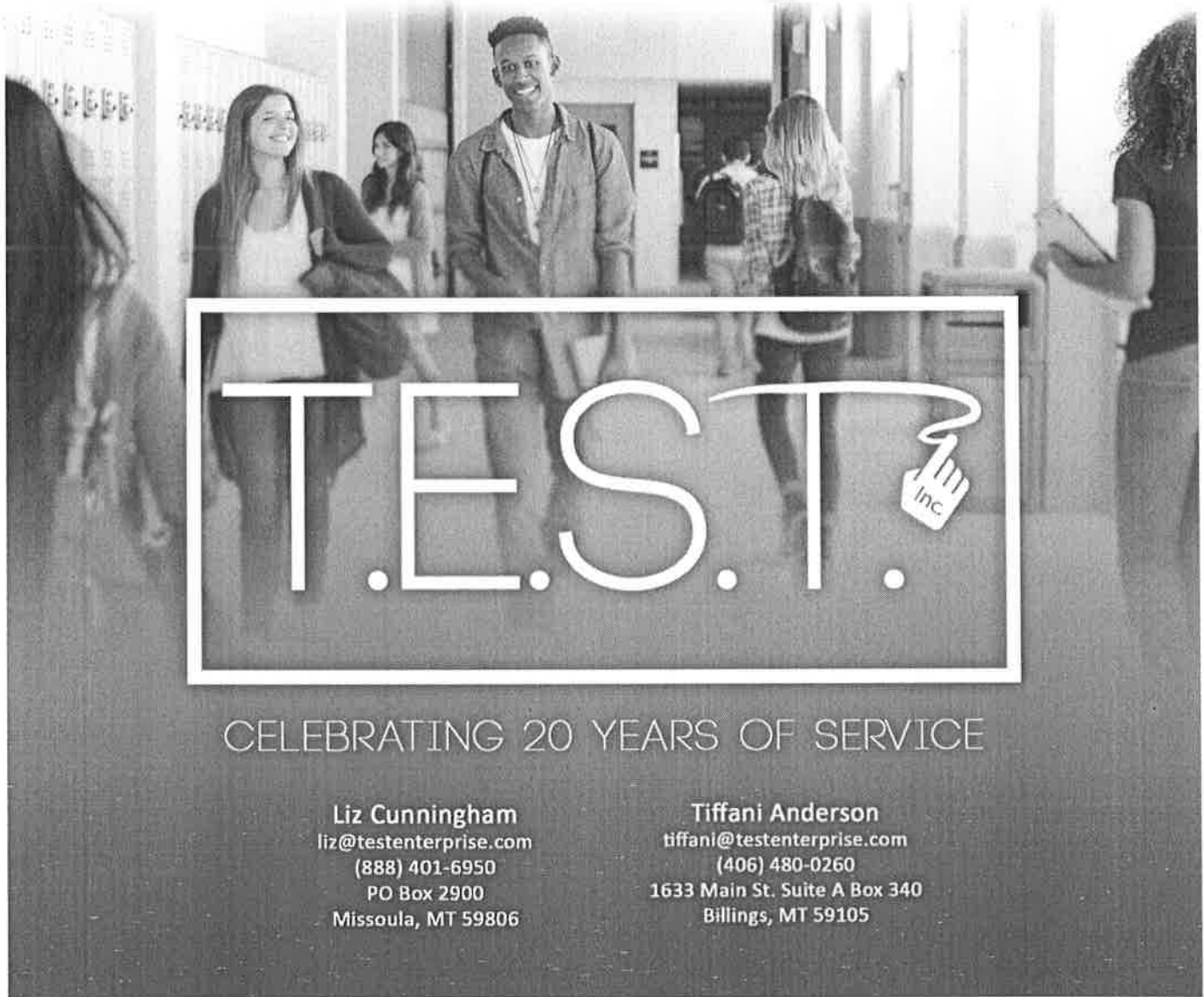
Tony Kushner
406-250-0458
Systems Northwest, LLC



GALLATIN GATEWAY SCHOOL

Video Surveillance Proposals

August 1, 2023



CELEBRATING 20 YEARS OF SERVICE

Liz Cunningham
liz@testenterprise.com
(888) 401-6950
PO Box 2900
Missoula, MT 59806

Tiffani Anderson
tiffani@testenterprise.com
(406) 480-0260
1633 Main St. Suite A Box 340
Billings, MT 59105

Authorized Reseller

AVIGILON™

a Motorola Solutions Company



PO Box 2900, Missoula, MT 59806 • **1-888-401-6950** or (406) 541-6950 • FAX: (406) 541-6949 • www.testenterprise.com



CELEBRATING 20 YEARS OF SERVICE

Our commitment to Montana: SMART SAFE SECURE SCHOOLS

Total Education Solutions in Technology, Inc. (T.E.S.T., Inc.) was founded by Liz Cunningham in 1999 as a Montana based woman owned company. T.E.S.T. consults closely with Montana schools to research and provide only the best innovative technology. We are committed to helping schools and educators evaluate, implement and integrate the best innovative educational technology to empower students to discover new understanding and attain individual success in efficient and safe environments. T.E.S.T.'s solutions are always focused on what is best for students!

T.E.S.T., Inc was created as an educational training company. After researching effective training and teaching strategies, Liz purchased a SMART Board to use for training. Through the effectiveness of creating dynamic and engaging training using the SMART Board and the interest from school districts in purchasing and implementing the technology into their classrooms, T.E.S.T. became a SMART Authorized Reseller for Montana. T.E.S.T. has organized state-wide technology conferences, provided regional training events, local technology workshops, on-site visits and individual teacher support over the past 20 years.

In 2001 through 2004, T.E.S.T. was contracted by the University of Montana to develop and implement leadership and technology training to Montana school administrators through the Bill and Melinda Gates Foundation State Technology Challenge Grant. T.E.S.T. assisted schools in completing a grant required on-line assessment – Taking a Good Look at Instructional Technology (TAGLIT). Through this project, the Montana Office of Public Instruction (OPI) adopted TAGLIT as its state technology assessment for Title II, Part D funding. In 2005, T.E.S.T. acquired the rights to TAGLIT from the Gates Foundation and administered the on-line assessment nationally for K-12 school districts for many years.

Liz Cunningham served as a Five-Year Comprehensive Education Plan facilitator for OPI. Through her work on this project, she coordinated a group of eleven school districts in eastern Montana to form a technology consortium and submitted a Partnerships for Student Achievement Through Technology (PSATT) competitive technology grant for high-need school districts funded by Enhancing Education Through Technology (Ed Tech) Title II, Part D of the Elementary and Secondary Education Act as Amended by the No Child Left Behind (NCLB) Act of 2001. The Eastern Montana Technology Education Consortium (EMTEC) was awarded its first round of funding from 2003-2005 as one of six funded grants. Liz Cunningham served as the EMTEC Grant Director. In 2005, T.E.S.T. coordinated groups of schools in 4 regional areas to submit for the second round of PSATT grant Title II, Part D competitive technology grants. All four grants (EMTEC, ACE, LIFT, and M7) were awarded funding from 2005-2008. As project director, Liz implemented two Intel Tech to the Future research-based programs – the Essentials Course and Teaching, Thinking with Technology. T.E.S.T coordinated all facets of the project including technology professional development, lesson development, mentoring, assessment, evaluation, and project partnerships.

The love of serving Montana schools continues on through the ongoing research of solutions that best serve their needs. T.E.S.T. is proud to represent companies that are pioneers in their fields and are always leading the way with innovative advancements. SMART was the founder of interactive boards in the classroom and continues to lead the industry with their new SMART Displays with IQ and collaborative SMART Learning Suite software. Audio Enhancement is not only the founding company of audio systems in the classroom but continues to incorporate the needs of schools and has added the SAFE (Security Alert for Education) System into their teacher microphones, has the ability to add video cameras into their systems and use View Path to record, store, and share video for instructional solutions and now provides a reliable school-wide Intercom, Paging, and Bells Solution that helps organize students, strengthens situational outcomes and can even help save lives. Avigilon Security Solutions offers the best high definition video security cameras that include cutting edge analytics that help prevent incidents instead of just reviewing them after the fact. Their surveillance cameras also integrate with their access control system, offering solutions that provide the security our students deserve to have. Liz & Steve Cunningham are from Lewistown, MT. Steve was the first responder on site during the shooting at Lewistown School District in 1986 and the shooter was one of Liz's friend's younger brother. This event greatly impacted their lives and has come full circle to their commitment to evaluate and find the BEST solutions for school safety and security! Our KIDS are the reason T.E.S.T. has evolved into much more than a training company and drives our passion to find effective solutions to keep them safe! T.E.S.T proudly continues to build a FIRST-CLASS TEAM of experts to serve Montana Schools. **Thank you for your business over the last 24+ years and here's to many more years!!**





CELEBRATING 20 YEARS OF SERVICE

Our commitment to Montana:
SMART SAFE SECURE SCHOOLS

SMART SAFE SECURE SCHOOLS



840 Shoreline Dr., Suite C | PO Box 1075 Polson, MT 59860
P 888-401-6950 | F 406-541-6950 | sales@testenterprise.com

www.testenterprise.com

This quote is prepared for:

8/1/2023

School District

Gallatin Gateway

Avigilon-On Prem Solution with Full Analytics

AVIGILON

HEAD END

Qty	Product Name	MSRP	Unit Price	Total
1	NVR5-STD-32TB-S19-NA	21698.2	17,358.56	17,358.56
19	ACC7-ENT Software	316.51	253.21	4,810.99

CAMERAS

7	24C-H5A-3MH	2651	2,120.80	14,845.60
1	20C-H5A-4MH	2757	2,205.60	2,205.60
1	8.0C-H5A-DO1-IR	1770.03	1,416.02	1,416.02
10	6.0C-H5A-D1-IR	1339.67	1,071.74	10,717.40

19 MOUNTS/ACC

7	H4AMH-AD-PEND1	188.8	151.04	1,057.28
7	IRPTZ-MNT-WALL1	112.11	89.69	627.83
7	H4AMH-DO-COVR1	188.8	151.04	1,057.28
7	H4AMH-AD-IRIL1	389.4	311.52	2,180.64
7	POE-INJ2-60W-NA	177	141.60	991.20
6	H4-MT-CRNR1	106.2	84.96	509.76
1	H4AMH-AD-CEIL1	177	141.60	141.60
1	H4AMH-DC-CPNL1	129.8	103.84	103.84
1	H4AMH-DC-COVR1	82.61	66.09	66.09

LABOR

19	Installation, Termination & Certification CAT6 Cable		250.00	4,750.00
19	Installation, Aim, Commission - Cameras		100.00	1,900.00
	Installation & Programming of Server			2,500.00
	Travel - includes travel time, mileage, lodging, & Per Diem			1,939.55

MANAGEMENT/SERVICES

	Project Management/Commissioning/Final Project Documents			3,458.96
	Training			1,000.00
	Support - 1 year			1,550.00
	Shipping			691.79

TOTALS

\$ 75,879.99





CELEBRATING 20 YEARS OF SERVICE

Our commitment to Montana:
SMART SAFE SECURE SCHOOLS

SMART SAFE SECURE SCHOOLS



www.testenterprise.com

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P 888-401-6950 | F 406-541-6950 | sales@testenterprise.com

This quote is prepared for:

8/1/2023

School District

Gallatin Gateway

Avigilon-On Prem Solution with Partial Analytics

AVIGILON

HEAD END

Qty	Product Name	MSRP	Unit Price	Total
1	VMA-AS3-24P24-NA	11411.5	9,129.20	9,129.20
19	ACC7-ENT Software	316.51	253.21	4,810.99

CAMERAS

7	24C-H5A-3MH	2651	2,120.80	14,845.60
1	20C-H5A-4MH	2757	2,205.60	2,205.60
1	8.0C-H5A-DO1-IR	1770.03	1,416.02	1,416.02
10	5.0C-H5SL-D1	660.8	528.64	5,286.40

19 MOUNTS/ACC

7	H4AMH-AD-PEND1	188.8	151.04	1,057.28
7	IRPTZ-MNT-WALL1	112.11	89.69	627.83
7	H4AMH-DO-COVR1	188.8	151.04	1,057.28
7	H4AMH-AD-IRIL1	389.4	311.52	2,180.64
7	POE-INJ2-60W-NA	177	141.60	991.20
6	H4-MT-CRNR1	106.2	84.96	509.76
1	H4AMH-AD-CEIL1	177	141.60	141.60
1	H4AMH-DC-CPNL1	129.8	103.84	103.84
1	H4AMH-DC-COVR1	82.61	66.09	66.09

LABOR

19	Installation, Termination & Certification CAT6 Cable		250.00	4,750.00
19	Installation, Aim, Commission - Cameras		100.00	1,900.00
	Installation & Programming of Server			2,500.00
	Travel - includes travel time, mileage, lodging, & Per Diem			1,939.55

MANAGEMENT/SERVICES

	Project Management/Commissioning/Final Project Documents			2,775.94
	Training			1,000.00
	Support - 1 year			1,550.00
	Shipping			555.18

TOTALS

\$ 61,400.00





CELEBRATING 20 YEARS OF SERVICE

Our commitment to Montana:
SMART SAFE SECURE SCHOOLS

SMART SAFE SECURE SCHOOLS



www.testenterprise.com

840 Shoreline Dr., Suite C | PO Box 1075 Polson, MT 59860
P 888-401-6950 | F 406-541-6950 | sales@testenterprise.com

This quote is prepared for:

8/1/2023

School District

Gallatin Gateway

Avigilon Alta Cloud Solution with Analytics



SOFTWARE

Qty	Product Name	MSRP	Unit Price	Total
18	Ava Aware License - 3 years	499	399.20	7,185.60

HARDWARE

Product Name				
8	Ava Quad - Black - 30 Days	3099	2,479.20	19,833.60
7	Ava Dome - 5MP 30 days - White	999	799.20	5,594.40
3	Ava Bullet Tele White - 4K - 30 days	1679	1,343.20	4,029.60

MOUNTS/ACC

Product Name				
7	Pendant Mounting Cap - White	44	35.20	246.40
7	Mounting Arm - White	66	52.80	369.60
8	Quad Wall Mount Bracket	87	69.60	556.80

SERVICES

Product Name				
18	Installation, Termination & Certification CAT6 Cable		250.00	4,500.00
18	Installation, Aim, Commission		100.00	1,800.00
	Travel - includes travel time, mileage, lodging, & Per Diem			1,939.55

MANAGEMENT/SERVICES

	Project Management/Commissioning/Final Project Documents			2,302.78
	Training			1,000.00
	Support - 1 year			1,550.00
	Shipping			460.56

TOTALS

\$ 51,368.88





Billings School District

Industry: Education

Location: Billings, Montana, USA

AVIGILON
a Motorola Solutions Company

SUCCESS STORY:

Safeguarding Our Future

Billings Public Schools (BPS) is the largest school district in the state of Montana, comprised of 31 schools, 1,800 teachers and over 17,000 students living within a highly diverse region. BPS strives to inspire, educate and empower students to be responsible and innovative global citizens who achieve their full potential, and they are looked to as an example for other schools when it comes to education and security practices.

With such a sizable student and teacher population, risk mitigation became an inherent security priority for BPS. Total Education Solutions in Technology Inc., a security integrator, introduced the district to Avigilon to demonstrate how a complete security solution could help to enhance safety of their students and staff. BPS decided to implement a pilot solution in one of their middle schools, where common challenges include vandalism, graffiti and bullying amongst the students.



Avigilon Solutions Implemented

Avigilon Control Center (ACC) Software
Allows quick and easy review of live or recorded video with a simplified screen layout, intuitive controls and self-learning video analytics. Also features Avigilon Appearance Search™ technology to help you quickly find a person or vehicle of interest.

H4 PTZ Camera Line
Combines powerful zoom, high-speed tracking with 360-degree coverage and built-in self-learning video analytics

HD Multisensor Camera Line
Provides flexible scene coverage with one license and wire pull to save on installation, time and cost.

H4 Fisheye Camera Line
Provides 360° panoramic views with no blind spots in 6 and 12 MP resolutions.

Self-Learning Video Analytics
Recognize and detect the movements of people and vehicles, notifying operators of events that may need further investigation.

A New Solution

To combat the high rate of crime and at-school incidents that Riverside Middle School was facing, BPS deployed a complete Avigilon video surveillance system featuring video analytics. Avigilon cameras with self-learning video analytics were installed along with Avigilon Control Center (ACC) video management software and Avigilon Appearance Search technology. The system allows BPS to leverage artificial intelligence and video analytics capabilities to help quickly search for, identify, verify and act on potentially critical events.

Within just seven months, BPS saw a considerable change within Riverside Middle School. The new security system served as both an effective deterrent and investigative tool, helping to reduce incidents of vandalism, graffiti and bullying. BPS saw first-hand how Avigilon solutions could help them achieve three of their top objectives: mitigating violence, de-escalating bullying, and reducing vandalism and theft.

Avigilon in Action

Mitigating Violence

After installation of the system, a significant fight occurred at the school gym between a few of the students. After the principal was called and the incident concluded, each student was interviewed so that school administrators could gain a better understanding of what had happened and respond accordingly. Since there were discrepancies with each story, the principal relied on ACC's easy-to-use interface, advanced search capabilities and exceptional image detail to uncover the truth, and was able to identify and resolve the situation in a matter of minutes.

CONTINUED



De-escalating Bullying

BPS experienced further success with their new security system when the principal noticed a particular student had a habit of taking her lunch to the bathroom on a daily basis. Avigilon Appearance Search technology enabled the principal to quickly confirm the student's whereabouts during lunch hours by showing when she entered and exited the bathroom, which prompted him to address the strange behavior with the student. After a brief conversation, the principal realized she was forced to do so as a result of bullying and was able to resolve the issue with all involved students and their parents to ensure the behavior would stop.

"When a student is facing bullying, our security system can help to take the target off their back," says **Kevin Kirkman, Principal at Riverside Middle School**. "Kids are often scared to voice these kinds of issues to an adult because they fear retaliation, but now we can catch bullying without it being reported; we can gather robust video evidence and address the behavior without creating further problems for the victim."

Reducing Vandallism and Theft

Outside of inter-student conflicts, BPS has been able to use their new security system as a safeguard against property damage and liability claims. In one such case, BPS used video evidence and Avigilon Appearance Search technology to locate and identify that a contractor working onsite was



H4 Fisheye Camera



responsible for an open door that led to a break-in. This allowed BPS to hold the contractor accountable for the expenses of the related damages.

"The new Avigilon system has made our jobs a whole lot easier," says **Mr. Kirkman**. "When an incident occurs, school administrators no longer have to talk to multiple individuals to try and figure out what happened. The investigation is simple; we can see what happened, clear as day. It's made it easier to uphold school rules and maintain a safe environment for students and staff."

The Avigilon system has also enabled proactive after-hours monitoring of the school grounds. With predefined analytics rules, the system can detect the movement of people and vehicles in specific areas and notify operators for further investigation, allowing them to quickly respond to potentially critical events before they escalate.

A Scalable Success

BPS's new security solution has provided Riverside Middle School with an extra layer of security. By allowing staff to mitigate risk and proactively address negative behavior in a middle school that faced vandalism, graffiti and bullying, it has helped decrease at-school incidents and crime rates. As a result of its success, BPS is planning to standardize Avigilon security solutions in various phases throughout the district. ■

Old Business
ACTION ITEM

Trustee's Financial Summary for 22-23

Presented by: Kelly Henderson and Brittney Bateman

Background (to include funding source if applicable):

Recommendation: Administration recommends approval of the Trustee's Financial Summary for 22-23



Trustees' Financial Summary

FY2022-23

Submit ID:

16 Gallatin County

0364 Gallatin Gateway Elem

Due Date:

Board of Trustees transmits to County Supt. not later than August 15th (MCA 20-9-213)

County Supt. transmits to the Office of Public Instruction no later than September 15th. (MCA 20-3-209)

This report is the school district's official submission of annual financial information to the county superintendent and state superintendent under section 20-9-213, MCA.

- *Trustees are responsible for ensuring the accuracy and prompt submission of this report.*
- *Subsequent amendments to this report made by the clerk of the district as a result of the desk audit process are considered officially made on behalf of the trustees.*
- *Amendments initiated by OPI to correct coding or to comply with GAAP as a result of the desk audit process and which are communicated in writing to the clerk will be assumed to be accepted by the trustees unless the district notifies OPI in writing of their objection by December 10.*
- *This report and any amendments initiated by the district through December 10 are binding for use in determining various allocations of state and federal grants and in monitoring maintenance of effort for state and federal programs.*

Certification

Business Manager/Clerk:

Brittney Bateman

Phone #:

(406) 763-4415

(Signature)

(Date)

Chair, Board of Trustees:

Aaron Schwieterman

(Signature)

(Date)

County Superintendent

John Nielson

(Signature)

(Date)

Software

Accounting Package:

Black Mountain

For FY23 did the district employ a certified special education director?

No

As reported through TEAMS - Terms of Employment, the district does not employ a certified special education director meeting the requirements of having a class III Administrator's certificate with a principal's endorsement or a supervisor's endorsement in special education. Administrative rules provide expenditures coded to program 280, function 24XX and Object 1XX and 2XX in Funds 01, 13, 24, 25, or 26 to be included in the calculation of reversion and disproportionate costs only if the district employs a certified special education director.

Electronic filers are not required to send the cover page to OPI.



Trustees' Financial Summary

FY2022-23

Submit ID:

16 Gallatin County

0364 Gallatin Gateway Elem

Project Reporter Codes

PRC	Title	Program Type	Project Number	CFDA#
137	ART	LOCAL	137	
145	MISCELLANEOUS	LOCAL	145	
149	Facility Rental	LOCAL	149	
160	LIBRARY	LOCAL	160	
169	PCARD REBATE	LOCAL	169	
195	BOOK FAIR- LIBRARY	LOCAL	195	
207	Excess Sale proceeds	LOCAL	207	
216	Yearbook Sales	LOCAL		
430	REAP (FY21)	FEDERAL		
432	REAP	FEDERAL	432	
434	Fy 22 Title I	FEDERAL		
612	BUILDING RESERVE- Voted Levy	LOCAL	612	
613	BUILDING RESERVE- PERMISSIVE LEVY	LOCAL	613	
680	Building Reserve - Voted Levy	LOCAL	680	
710	Field Trips	LOCAL	710	
711	DC Field Trip	LOCAL	711	
737	DPHHS ESSER III REOPENING GRANT	FEDERAL		
775	CRRSA - State School Emergency Relief Fund II (ESSER II)	FEDERAL	775	84.425D
776	ESSER II SUPPLEMENTAL	FEDERAL		
777	ESSER II - Special Needs	FEDERAL	777	
785	ARP - State School Emergency Relief Fund (ESSER III)	FEDERAL	785	84.425U
786	ESSER III SUPPLEMENTAL	FEDERAL		
787	ESSER III - Learning Loss	FEDERAL	787	



Trustees' Financial Summary

FY2022-23

Submit ID:

16 Gallatin County

0364 Gallatin Gateway Elem

Balance Sheet

		General Fund	Transportation Fund	Bus Depreciation Reserve Fund	School Food Services Fund
ASSETS, LIABILITIES, AND FUND BALANCE		(01)	(10)	(11)	(12)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)	94,366.93	33,274.20	128,261.13	(10,844.71)
02	Taxes Receivable - Real and Personal (120-149)	17,997.00	3,414.00	1,021.00	
03	Taxes Receivable - Protested (150-159)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)		7,282.97		
06	Other Current Assets (190-210)				
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
20	TOTAL ASSETS AND OTHER DEBITS	112,363.93	43,971.17	129,282.13	(10,844.71)
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)				
27	Other Liabilities (690 - 699)				
35	TOTAL LIABILITIES				
DEFERRED INFLOWS					
36	Deferred Inflows (680)	17,997.00	3,414.00	1,021.00	
FUND BALANCE/EQUITY					
37	Reserve for Inventories (951)				
38	Reserve for Encumbrances (953)				
46	Non-Materialized ANB - Excess Levy				
47	TIF Fund Balance For Budget				
48	Fund Balance for Budget	94,366.93	40,557.17	128,261.13	(10,844.71)
52	TOTAL FUND BALANCE/EQUITY	94,366.93	40,557.17	128,261.13	(10,844.71)
53	TOTAL LIABILITIES AND FUND BALANCE	112,363.93	43,971.17	129,282.13	(10,844.71)



Trustees' Financial Summary

FY2022-23

Submit ID:

16 Gallatin County

0364 Gallatin Gateway Elem

Balance Sheet

		Tuition Fund	Retirement Fund	Miscellaneous Programs Fund	Adult Education Fund
ASSETS, LIABILITIES, AND FUND BALANCE		(13)	(14)	(15)	(17)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)	15,173.12	21,023.67	31,875.45	17,557.08
02	Taxes Receivable - Real and Personal (120-149)	17.00			431.00
03	Taxes Receivable - Protested (150-159)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)		58,666.20	92,192.94	
06	Other Current Assets (190-210)			57,795.16	
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
20	TOTAL ASSETS AND OTHER DEBITS	15,190.12	79,689.87	181,863.55	17,988.08
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)			14,712.88	4,750.00
27	Other Liabilities (690 - 699)				
35	TOTAL LIABILITIES			14,712.88	4,750.00
DEFERRED INFLOWS					
36	Deferred Inflows (680)	17.00			431.00
FUND BALANCE/EQUITY					
37	Reserve for Inventories (951)				
38	Reserve for Encumbrances (953)			630.00	
48	Fund Balance for Budget	15,173.12	79,689.87	166,520.67	12,807.08
52	TOTAL FUND BALANCE/EQUITY	15,173.12	79,689.87	167,150.67	12,807.08
53	TOTAL LIABILITIES AND FUND BALANCE	15,190.12	79,689.87	181,863.55	17,988.08



Trustees' Financial Summary

FY2022-23

Submit ID:

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Balance Sheet

		Traffic Education Fund	Non-Operating Fund	Lease-Rental Fund	Compensated Absence Fund
ASSETS, LIABILITIES, AND FUND BALANCE		(18)	(19)	(20)	(21)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)				566.13
02	Taxes Receivable - Real and Personal (120-149)				
03	Taxes Receivable - Protested (150-159)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
20	TOTAL ASSETS AND OTHER DEBITS				566.13
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)				
27	Other Liabilities (690 - 699)				
35	TOTAL LIABILITIES				
DEFERRED INFLOWS					
36	Deferred Inflows (680)				
FUND BALANCE/EQUITY					
37	Reserve for Inventories (951)				
38	Reserve for Encumbrances (953)				
48	Fund Balance for Budget				566.13
52	TOTAL FUND BALANCE/EQUITY				566.13
53	TOTAL LIABILITIES AND FUND BALANCE				566.13



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Balance Sheet

		Metal Mines Tax Reserve Fund	State Mining Impact Fund	Impact Aid Fund	Litigation Reserve Fund
ASSETS, LIABILITIES, AND FUND BALANCE		(24)	(25)	(26)	(27)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
20	TOTAL ASSETS AND OTHER DEBITS				
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)				
27	Other Liabilities (690 - 699)				
35	TOTAL LIABILITIES				
DEFERRED INFLOWS					
36	Deferred Inflows (680)				
FUND BALANCE/EQUITY					
37	Reserve for Inventories (951)				
38	Reserve for Encumbrances (953)				
48	Fund Balance for Budget				
52	TOTAL FUND BALANCE/EQUITY				
53	TOTAL LIABILITIES AND FUND BALANCE				



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Balance Sheet

		Technology Fund	Flexibility Fund	Permanent Endowment Fund	Debt Service Fund
ASSETS, LIABILITIES, AND FUND BALANCE		(28)	(29)	(45)	(50)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)	12,338.13	11,566.79		6,087.29
02	Taxes Receivable - Real and Personal (120-149)	623.00			268.00
03	Taxes Receivable - Protested (150-159)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
20	TOTAL ASSETS AND OTHER DEBITS	12,961.13	11,566.79		6,355.29
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)				
27	Other Liabilities (690 - 699)				
35	TOTAL LIABILITIES				
DEFERRED INFLOWS					
36	Deferred Inflows (680)	623.00			268.00
FUND BALANCE/EQUITY					
37	Reserve for Inventories (951)				
38	Reserve for Encumbrances (953)				
39	Reserve for Endowments (954)				
47	TIF Fund Balance For Budget				
48	Fund Balance for Budget	12,338.13	11,566.79		6,087.29
52	TOTAL FUND BALANCE/EQUITY	12,338.13	11,566.79		6,087.29
53	TOTAL LIABILITIES AND FUND BALANCE	12,961.13	11,566.79		6,355.29



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Balance Sheet

		Building Fund	Building Reserve Fund	Day Care Enterprise Fund	Industrial Arts Fund
ASSETS, LIABILITIES, AND FUND BALANCE		(60)	(61)	(70)	(71)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)	2,205.84	203,497.38		
02	Taxes Receivable - Real and Personal (120-149)		2,759.00		
03	Taxes Receivable - Protested (150-159)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
10	Land and Land Improvements (311-322)				
11	Buildings and Building Improvements (331 & 332)				
12	Machinery and Equipment (341 & 342)				
13	Construction Work in Progress (351)				
20	TOTAL ASSETS AND OTHER DEBITS	2,205.84	206,256.38		
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)				
27	Other Liabilities (690 - 699)				
29	Notes Payable - Noncurrent (720)				
30	Lease Obligations Payable (730)				
32	Compensated Absences Payable (760)				
33	Net Pension Liability (770)				
35	TOTAL LIABILITIES				
DEFERRED INFLOWS					
36	Deferred Inflows (680)		2,759.00		
FUND BALANCE/EQUITY					
37	Reserve for Inventories (951)				
38	Reserve for Encumbrances (953)				
41	Unrestricted Net Assets (940)				
47	TIF Fund Balance For Budget				
48	Fund Balance for Budget	2,205.84	203,497.38		
50	Invested in Capital Assets, Net of Related Debt				
52	TOTAL FUND BALANCE/EQUITY	2,205.84	203,497.38		
53	TOTAL LIABILITIES AND FUND BALANCE	2,205.84	206,256.38		



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Balance Sheet

		Miscellaneous Enterprise Fund	Data Processing Internal Service Fund	Purchasing Internal Service Fund	Central Transportation Internal Service Fund
ASSETS, LIABILITIES, AND FUND BALANCE		(72)	(73)	(74)	(75)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
10	Land and Land Improvements (311-322)				
11	Buildings and Building Improvements (331 & 332)				
12	Machinery and Equipment (341 & 342)				
13	Construction Work in Progress (351)				
20	TOTAL ASSETS AND OTHER DEBITS				
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)				
27	Other Liabilities (690 - 699)				
29	Notes Payable - Noncurrent (720)				
30	Lease Obligations Payable (730)				
32	Compensated Absences Payable (760)				
33	Net Pension Liability (770)				
35	TOTAL LIABILITIES				
DEFERRED INFLOWS					
36	Deferred Inflows (680)				
FUND BALANCE/EQUITY					
38	Reserve for Encumbrances (953)				
41	Unrestricted Net Assets (940)				
50	Invested in Capital Assets, Net of Related Debt				
52	TOTAL FUND BALANCE/EQUITY				
53	TOTAL LIABILITIES AND FUND BALANCE				



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Balance Sheet

ASSETS, LIABILITIES, AND FUND BALANCE		Instructional Materials Ctr Internal Service Fund	Miscellaneous Internal Service Fund	Self Insurance Fund - Health	Self Insurance Fund - Liability
		(76)	(77)	(78)	(79)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
10	Land and Land Improvements (311-322)				
11	Buildings and Building Improvements (331 & 332)				
12	Machinery and Equipment (341 & 342)				
13	Construction Work in Progress (351)				
20	TOTAL ASSETS AND OTHER DEBITS				
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)				
27	Other Liabilities (690 - 699)				
29	Notes Payable - Noncurrent (720)				
30	Lease Obligations Payable (730)				
32	Compensated Absences Payable (760)				
33	Net Pension Liability (770)				
35	TOTAL LIABILITIES				
DEFERRED INFLOWS					
36	Deferred Inflows (680)				
FUND BALANCE/EQUITY					
38	Reserve for Encumbrances (953)				
39	Reserve for Endowments (954)				
41	Unrestricted Net Assets (940)				
48	Fund Balance for Budget				
50	Invested in Capital Assets, Net of Related Debt				
52	TOTAL FUND BALANCE/EQUITY				
53	TOTAL LIABILITIES AND FUND BALANCE				



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Balance Sheet

ASSETS, LIABILITIES, AND FUND BALANCE		Private Purpose Trust (spend interest only)	Interlocal Agreement Fund	Student Extracurricular Activities Fund	Private Purpose Trust (spend principal & interest)
		(81)	(82)	(84)	(85)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)	1,556.41		44,095.99	
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
07	Inventories (220 & 230)				
08	Prepaid Expenses (240)				
09	Deposits (250)				
20	TOTAL ASSETS AND OTHER DEBITS	1,556.41		44,095.99	
DEFERRED OUTFLOWS					
21	Deferred Outflows (501)				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
25	Other Current Liabilities (621-679)				
27	Other Liabilities (690 - 699)				
35	TOTAL LIABILITIES				
DEFERRED INFLOWS					
36	Deferred Inflows (680)				
FUND BALANCE/EQUITY					
37	Reserve for Inventories (951)				
38	Reserve for Encumbrances (953)				
39	Reserve for Endowments (954)				
45	Assets Held in Trusts	1,556.41		44,095.99	
52	TOTAL FUND BALANCE/EQUITY	1,556.41		44,095.99	
53	TOTAL LIABILITIES AND FUND BALANCE	1,556.41		44,095.99	



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Balance Sheet

ASSETS, LIABILITIES, AND FUND BALANCE		Payroll Clearing Fund	Claims Clearing Fund	Investment Earnings Clearing Fund	Retirement/COBRA Insurance Fund
		(86)	(87)	(88)	(89)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)	43,642.46	31,249.55		
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
20	TOTAL ASSETS AND OTHER DEBITS	43,642.46	31,249.55		
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
24	Warrants Payable (620)	21,365.69	31,249.55		
25	Other Current Liabilities (621-679)	22,276.77			
35	TOTAL LIABILITIES	43,642.46	31,249.55		
FUND BALANCE/EQUITY					
52	TOTAL FUND BALANCE/EQUITY				
53	TOTAL LIABILITIES AND FUND BALANCE	43,642.46	31,249.55		



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Balance Sheet

		Custodial Fund - A	Custodial Fund - B	Custodial Fund - C	Custodial Fund - D
ASSETS, LIABILITIES, AND FUND BALANCE		(90)	(91)	(92)	(93)
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
20	TOTAL ASSETS AND OTHER DEBITS				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
24	Warrants Payable (620)				
25	Other Current Liabilities (621-679)				
35	TOTAL LIABILITIES				
FUND BALANCE/EQUITY					
52	TOTAL FUND BALANCE/EQUITY				
53	TOTAL LIABILITIES AND FUND BALANCE				



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Balance Sheet

		Custodial Fund - E	Cafeteria/Flex Plan Fund		
ASSETS, LIABILITIES, AND FUND BALANCE		(94)	(95)		
ASSETS AND OTHER DEBITS					
01	Cash & Investments (101-119) Less Warrants Payable (620)				
04	Receivables from Other Funds (160-179)				
05	Due From Other Governments (180)				
06	Other Current Assets (190-210)				
20	TOTAL ASSETS AND OTHER DEBITS				
LIABILITIES					
22	Payable to Other Funds (601-606)				
23	Due to Other Governments (611)				
24	Warrants Payable (620)				
25	Other Current Liabilities (621-679)				
35	TOTAL LIABILITIES				
FUND BALANCE/EQUITY					
52	TOTAL FUND BALANCE/EQUITY				
53	TOTAL LIABILITIES AND FUND BALANCE				



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Schedule of Revenues, Expenditures and Changes in Fund Balance

01 - General Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In:			Fund Code 01	
PRC	Revenue		2022 Value	2023 Value
1110	District Tax Levy		0.00	509,860.28
1111	District Levy - Real Property		519,714.08	0.00
1112	District Levy - Personal Property		2,475.71	0.00
1114	District Levy - Personal Property/Mobile Homes		3,656.03	0.00
1117	District Levy - Distribution of Prior Year Protested/Delinquent Taxes		0.00	5,974.74
1190	Penalties and Interest on Taxes		1,723.15	1,209.60
1510	Interest Earnings		1,159.16	2,462.80
1900	Other Revenue from Local Sources		10.00	35,498.33
3110	Direct State Aid		543,162.21	553,305.77
3111	Quality Educator		51,621.25	48,781.60
3112	At Risk Student		2,546.32	2,212.22
3113	Indian Education For All		3,836.30	3,887.76
3114	American Indian Achievement Gap		446.00	458.00
3115	State Special Education Allowable Cost Payment to Districts		25,188.45	24,852.61
3116	Data For Achievement		3,672.37	3,722.43
3120	State - Guaranteed Tax Base Aid		189,657.36	180,153.92
6100	Material Prior Period Revenue Adjustments		3,151.86	31,634.07
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:			1,352,020.25	1,404,014.13

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				Fund Code 01		
PRC	Program	Function	Object	2022 Value	2023 Value	
	1XX	Regular Education Programs - Elementary/Secondary				
		1XXX	Instruction			
			1XX Personal Services - Salaries	616,829.59	642,770.99	
			2XX Personal Services - Employee Benefits	94,871.49	98,378.72	
			3XX Purchased Professional and Technical Services	342.25	2,616.69	
			5XX Other Purchased Services	0.00	153.80	
			6XX Supplies and Materials	41,698.43	75,629.55	
			810 Dues and Fees	1,214.00	1,862.81	
		21XX	Support Services - Students			
			1XX Personal Services - Salaries	42,811.65	44,484.89	
			2XX Personal Services - Employee Benefits	6,240.42	6,277.78	
			3XX Purchased Professional and Technical Services	616.17	63.42	
			6XX Supplies and Materials	776.42	45.00	
			810 Dues and Fees	45.00	0.00	
			8XX Other Expenditures	0.00	976.00	
		221X	Improvement of Instruction Services			
			6XX Supplies and Materials	31.19	0.00	



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Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					Fund Code 01
PRC	Program	Function	Object	2022 Value	2023 Value
			810 Dues and Fees	19,241.80	9,054.39
		222X	Educational Media Services		
		1XX	Personal Services - Salaries	27,618.02	31,153.44
		2XX	Personal Services - Employee Benefits	3,848.29	3,282.79
		3XX	Purchased Professional and Technical Services	0.00	1,195.51
		6XX	Supplies and Materials	4,669.13	7,780.58
		23XX	Support Services - General Administration		
		1XX	Personal Services - Salaries	107,606.02	151,621.63
		2XX	Personal Services - Employee Benefits	12,545.32	9,166.97
		3XX	Purchased Professional and Technical Services	30,558.62	33,598.23
		4XX	Purchased Property Services	0.00	145.62
		5XX	Other Purchased Services	14,865.78	9,767.78
		6XX	Supplies and Materials	7,523.14	6,141.81
		810	Dues and Fees	7,108.26	7,967.18
		24XX	Support Services - School Administration		
		1XX	Personal Services - Salaries	330.00	322.04
		2XX	Personal Services - Employee Benefits	21.66	1.50
		3XX	Purchased Professional and Technical Services	0.00	237.50
		810	Dues and Fees	0.00	1,125.00
		25XX	Support Services - Business		
		1XX	Personal Services - Salaries	36,727.04	43,886.73
		2XX	Personal Services - Employee Benefits	2,688.60	1,604.57
		3XX	Purchased Professional and Technical Services	0.00	1,157.00
		5XX	Other Purchased Services	1,806.81	0.00
		6XX	Supplies and Materials	14,485.32	11,441.70
		810	Dues and Fees	1,194.27	375.00
		8XX	Other Expenditures	0.00	4,447.55
		26XX	Operation and Maintenance of Plant Services		
		1XX	Personal Services - Salaries	2,970.50	3,478.50
		2XX	Personal Services - Employee Benefits	13.14	17.11
		3XX	Purchased Professional and Technical Services	395.00	14,203.61
		4XX	Purchased Property Services	114,193.65	120,666.46
		5XX	Other Purchased Services	12,683.45	16,052.71
		6XX	Supplies and Materials	20,432.52	13,443.27
		7XX	Property and Equipment Acquisition	0.00	1,068.00
		810	Dues and Fees	282.08	244.00
		280	Special Education - Local and State		
		1XXX	Instruction		
		1XX	Personal Services - Salaries	41,636.00	42,821.00
		2XX	Personal Services - Employee Benefits	7,503.38	7,551.63
		221X	Improvement of Instruction Services		
		6XX	Supplies and Materials	185.50	0.00



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Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					Fund Code 01	
PRC	Program	Function	Object	2022 Value	2023 Value	
		26XX	Operation and Maintenance of Plant Services			
		4XX	Purchased Property Services	0.00	150.51	
		5XX	Other Purchased Services	0.00	404.40	
		62XX	Resources Transferred to Other School Districts or Cooperatives			
		920	Resources Transferred to Other School Districts or Cooperatives	2,771.00	1,366.81	
	316		Data For Achievement			
		1XXX	Instruction			
		3XX	Purchased Professional and Technical Services	2,844.00	0.00	
	710		School Sponsored Extracurricular Activities			
		34XX	Extracurricular - Activities			
		1XX	Personal Services - Salaries	1,850.00	1,000.00	
		2XX	Personal Services - Employee Benefits	115.58	12.84	
		5XX	Other Purchased Services	1,420.53	0.00	
		6XX	Supplies and Materials	281.70	0.00	
		810	Dues and Fees	523.20	0.00	
	720		School Sponsored Athletics			
		35XX	Extracurricular - Athletics			
		1XX	Personal Services - Salaries	11,200.00	9,850.00	
		2XX	Personal Services - Employee Benefits	173.20	243.92	
		3XX	Purchased Professional and Technical Services	96.00	0.00	
	910		Food Services			
		31XX	Food Services			
		1XX	Personal Services - Salaries	2,091.48	11,085.99	
		2XX	Personal Services - Employee Benefits	350.02	835.75	
		6XX	Supplies and Materials	7,182.95	2,489.66	
		810	Dues and Fees	194.50	45.50	
	999		Undistributed			
		62XX	Resources Transferred to Other School Districts or Cooperatives			
		920	Resources Transferred to Other School Districts or Cooperatives	10,000.00	0.00	
		9999	Undistributed			
		892	Material Prior Period Expenditure Adjustments	0.00	6,133.75	
137	ART					
		1XX	Regular Education Programs - Elementary/Secondary			
		1XXX	Instruction			
		6XX	Supplies and Materials	237.50	0.00	
260						
		1XX	Regular Education Programs - Elementary/Secondary			
		1XXX	Instruction			
		6XX	Supplies and Materials	139.00	0.00	
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				<u>1,340,080.57</u>	<u>1,461,899.59</u>	



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Schedule Of Changes Worksheet

Fund Code 01

Beginning Fund Balance					152,252.39	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In					1,404,014.13	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out					1,461,899.59	(3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)	0.00	
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)	0.00	
					0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)					94,366.93	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

10 - Transportation Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 10

PRC	Revenue	2022 Value	2023 Value
1110	District Tax Levy	0.00	99,035.03
1111	District Levy - Real Property	100,681.93	0.00
1112	District Levy - Personal Property	474.04	0.00
1114	District Levy - Personal Property/Mobile Homes	666.74	0.00
1190	Penalties and Interest on Taxes	302.58	231.46
1410	Individual Transportation Fees	870.00	390.00
1510	Interest Earnings	109.35	1,225.44
1900	Other Revenue from Local Sources	0.00	2,605.46
2220	County On-Schedule Transportation Reimbursement	7,679.66	11,371.25
3210	State - On-Schedule Transportation Reimbursement	7,192.96	4,088.28
6100	Material Prior Period Revenue Adjustments	0.00	661.70
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		117,977.26	119,608.62

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 10

PRC	Program	Function	Object	2022 Value	2023 Value
1XX Regular Education Programs - Elementary/Secondary					
23XX Support Services - General Administration					
		1XX	Personal Services - Salaries	24,934.17	36,076.13
		2XX	Personal Services - Employee Benefits	2,769.86	1,753.15
		5XX	Other Purchased Services	1,276.82	281.71
25XX Support Services - Business					
		1XX	Personal Services - Salaries	18,895.69	19,833.10
		2XX	Personal Services - Employee Benefits	1,249.67	683.16
26XX Operation and Maintenance of Plant Services					
		4XX	Purchased Property Services	15,661.27	1,778.00
27XX Student Transportation Services					
		1XX	Personal Services - Salaries	24,214.67	43.91
		2XX	Personal Services - Employee Benefits	2,381.80	2.04
		3XX	Purchased Professional and Technical Services	712.26	0.00
		4XX	Purchased Property Services	71.51	6,743.05
		5XX	Other Purchased Services	5,963.81	43,763.30
		6XX	Supplies and Materials	6,111.95	6,804.87
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				104,243.48	117,762.42



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Schedule Of Changes Worksheet

Fund Code 10

Beginning Fund Balance						38,710.97 (1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In						119,608.62 (2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out						117,762.42 (3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)		0.00
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)		0.00
						0.00 (4)
Ending Fund Balance (1 + 2 - 3 + 4)						40,557.17 (5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

11 - Bus Depreciation Reserve Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 11

PRC	Revenue	2022 Value	2023 Value
1110	District Tax Levy	0.00	29,389.15
1111	District Levy - Real Property	29,814.30	0.00
1112	District Levy - Personal Property	141.71	0.00
1114	District Levy - Personal Property/Mobile Homes	207.15	0.00
1190	Penalties and Interest on Taxes	97.22	71.30
1510	Interest Earnings	338.87	1,833.88
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		30,599.25	31,294.33

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 11

PRC	Program	Function	Object	2022 Value	2023 Value
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				0.00	0.00

Schedule Of Changes Worksheet Fund Code 11

Beginning Fund Balance					96,966.80	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In					31,294.33	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out					0.00	(3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)	0.00	
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)	0.00	
					0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)					128,261.13	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

12 - School Food Services Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 12

PRC	Revenue	2022 Value	2023 Value
	1510 Interest Earnings	0.00	485.03
	1611 National School Lunch Program	4,773.23	3,905.00
	1613 Special Milk Program	9.00	0.00
	1621 Lunch Sales	345.99	57,525.79
	1632 Daily Adult Sales	2,368.23	10.00
	1900 Other Revenue from Local Sources	59.58	2,555.65
	4550 Federal School Nutrition Reimbursement	120,387.10	0.00
	4555 School Nutrition Summer Food Service Program	25,512.32	0.00
466			
	4550 Federal School Nutrition Reimbursement	7,166.80	0.00
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		160,622.25	64,481.47

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 12

PRC	Program	Function	Object	2022 Value	2023 Value
	910 Food Services				
		31XX Food Services			
			1XX Personal Services - Salaries	39,161.38	40,979.90
			2XX Personal Services - Employee Benefits	4,852.02	2,659.65
			3XX Purchased Professional and Technical Services	168.00	0.00
			4XX Purchased Property Services	0.00	150.51
			5XX Other Purchased Services	0.00	404.40
			6XX Supplies and Materials	102,766.76	44,247.28
			810 Dues and Fees	360.17	115.00
			8XX Other Expenditures	0.00	326.04
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				147,308.33	88,882.78



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Schedule Of Changes Worksheet

Fund Code 12

Beginning Fund Balance						13,556.60 (1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In						64,481.47 (2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out						88,882.78 (3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)		0.00
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)		0.00
						0.00 (4)
Ending Fund Balance (1 + 2 - 3 + 4)						-10,844.71 (5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance 13 - Tuition Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 13

PRC	Revenue	2022 Value	2023 Value
	1110 District Tax Levy	0.00	3.52
	1111 District Levy - Real Property	391.14	0.00
	1112 District Levy - Personal Property	6.01	0.00
	1114 District Levy - Personal Property/Mobile Homes	26.87	0.00
	1190 Penalties and Interest on Taxes	22.12	1.98
	1510 Interest Earnings	61.77	251.61
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		507.91	257.11

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 13

PRC	Program	Function	Object	2022 Value	2023 Value
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				0.00	0.00

Schedule Of Changes Worksheet Fund Code 13

Beginning Fund Balance					14,916.01	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In					257.11	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out					0.00	(3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)	0.00	
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)	0.00	
					0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)					15,173.12	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

14 - Retirement Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 14

PRC	Revenue	2022 Value	2023 Value
	1510 Interest Earnings	265.56	2,147.17
	2240 County Retirement Distribution	195,398.40	168,434.43
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		195,663.96	170,581.60

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 14

PRC	Program	Function	Object	2022 Value	2023 Value
	1XX Regular Education Programs - Elementary/Secondary				
		1XXX Instruction			
			2XX Personal Services - Employee Benefits	101,699.22	111,271.06
		21XX Support Services - Students			
			2XX Personal Services - Employee Benefits	7,444.94	7,173.31
		222X Educational Media Services			
			2XX Personal Services - Employee Benefits	4,681.44	5,228.64
		23XX Support Services - General Administration			
			2XX Personal Services - Employee Benefits	22,041.39	32,040.29
		24XX Support Services - School Administration			
			2XX Personal Services - Employee Benefits	49.55	25.93
		25XX Support Services - Business			
			2XX Personal Services - Employee Benefits	9,891.34	12,773.96
		26XX Operation and Maintenance of Plant Services			
			2XX Personal Services - Employee Benefits	241.20	280.45
		27XX Student Transportation Services			
			2XX Personal Services - Employee Benefits	4,048.01	3.54
	280 Special Education - Local and State				
		1XXX Instruction			
			2XX Personal Services - Employee Benefits	7,059.58	7,452.77
	610 Adult Continuing Education Programs				
		1XXX Instruction			
			2XX Personal Services - Employee Benefits	189.91	241.24
		23XX Support Services - General Administration			
			2XX Personal Services - Employee Benefits	539.97	828.85
		25XX Support Services - Business			
			2XX Personal Services - Employee Benefits	464.37	55.16
	710 School Sponsored Extracurricular Activities				
		34XX Extracurricular - Activities			
			2XX Personal Services - Employee Benefits	146.68	76.87



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Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					Fund Code 14	
PRC	Program	Function	Object		2022 Value	2023 Value
	720	School Sponsored Athletics				
		35XX	Extracurricular - Athletics			
			2XX Personal Services - Employee Benefits		1,369.02	786.79
	910	Food Services				
		31XX	Food Services			
			2XX Personal Services - Employee Benefits		6,861.37	8,218.44
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					<u>166,727.99</u>	<u>186,457.30</u>

Schedule Of Changes Worksheet					Fund Code 14	
Beginning Fund Balance						95,565.57 (1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In						170,581.60 (2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out						186,457.30 (3)
Increase/Decrease of Reserve for Inventories						
	This Year	0.00	Less Last Year	0.00 (4a)	0.00	
Increase/Decrease of Reserve for Encumbrances						
	This Year	0.00	Less Last Year	0.00 (4b)	0.00	
						0.00 (4)
Ending Fund Balance (1 + 2 - 3 + 4)						79,689.87 (5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

15 - Miscellaneous Programs Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In:		Fund Code 15
PRC	Revenue	2023 Value
137	ART	
	1900 Other Revenue from Local Sources	134.40
145	MISCELLANEOUS	
	1900 Other Revenue from Local Sources	88,351.13
	1920 Contributions/Donations from Private Sources	500.00
	6100 Material Prior Period Revenue Adjustments	-1,208.69
149	Facility Rental	
	1900 Other Revenue from Local Sources	910.00
	1910 Rentals	830.00
160	LIBRARY	
	1900 Other Revenue from Local Sources	2,953.15
169	PCARD REBATE	
	1900 Other Revenue from Local Sources	2,879.34
207	Excess Sale proceeds	
	1900 Other Revenue from Local Sources	23.77
	1920 Contributions/Donations from Private Sources	151.00
216	Yearbook Sales	
	1920 Contributions/Donations from Private Sources	560.00
430	REAP (FY21)	
	6100 Material Prior Period Revenue Adjustments	-1,200.00
434	Fy 22 Title I	
	4120 Title V, Part B, Subpart 1, Small Rural Schools Achievement (SRSA)	17,821.00
	4200 Title I, Part A, Improving Basic Programs	37,215.00
711	DC Field Trip	
	1920 Contributions/Donations from Private Sources	57,795.16
737	DPHHS ESSER III REOPENING GRANT	
	7370 ARP - DPHHS - Reopening Schools Grant	13,626.30
775	CRRSA - State School Emergency Relief Fund II (ESSER II)	
	6100 Material Prior Period Revenue Adjustments	-2,932.40
	7750 CRRSA - State School Emergency Relief Fund	11,397.00
777	ESSER II - Special Needs	
	7750 CRRSA - State School Emergency Relief Fund	1,411.00
785	ARP - State School Emergency Relief Fund (ESSER III)	
	6100 Material Prior Period Revenue Adjustments	8,130.00
787	ESSER III - Learning Loss	
	7850 ARP - State School Emergency Relief Fund	9,241.59
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		248,588.75



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Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				Fund Code 15	
PRC	Program	Function	Object	2022 Value	2023 Value
145	MISCELLANEOUS				
	1XX	Regular Education Programs - Elementary/Secondary			
	1XXX	Instruction			
		3XX	Purchased Professional and Technical Services		1,430.72
		6XX	Supplies and Materials		2,899.35
	21XX	Support Services - Students			
		1XX	Personal Services - Salaries		1,720.00
	25XX	Support Services - Business			
		1XX	Personal Services - Salaries		47,105.03
	26XX	Operation and Maintenance of Plant Services			
		4XX	Purchased Property Services		15,832.91
	710	School Sponsored Extracurricular Activities			
		34XX	Extracurricular - Activities		
		3XX	Purchased Professional and Technical Services		250.00
	910	Food Services			
		31XX	Food Services		
		7XX	Property and Equipment Acquisition		6,793.44
			145 Subtotal		<u>76,031.45</u>
160	LIBRARY				
	1XX	Regular Education Programs - Elementary/Secondary			
		222X	Educational Media Services		
		8XX	Other Expenditures		7.00
			160 Subtotal		<u>7.00</u>
195	BOOK FAIR- LIBRARY				
	1XX	Regular Education Programs - Elementary/Secondary			
		222X	Educational Media Services		
		6XX	Supplies and Materials		1,594.04
			195 Subtotal		<u>1,594.04</u>
434	Fy 22 Title I				
	1XX	Regular Education Programs - Elementary/Secondary			
		1XXX	Instruction		
		1XX	Personal Services - Salaries		8,351.32
	420	Title I, Part A, Improving Basic Programs			
		1XXX	Instruction		
		1XX	Personal Services - Salaries		38,297.13
		2XX	Personal Services - Employee Benefits		12,964.05
			434 Subtotal		<u>59,612.50</u>
710	Field Trips				
	1XX	Regular Education Programs - Elementary/Secondary			
		1XXX	Instruction		
		8XX	Other Expenditures		53.51



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Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					Fund Code 15	
PRC	Program	Function	Object	2022 Value	2023 Value	
	27XX	Student Transportation Services				
		5XX	Other Purchased Services		493.90	
710	School Sponsored Extracurricular Activities					
	34XX	Extracurricular - Activities				
		6XX	Supplies and Materials		1,004.31	
			710 Subtotal		<u>1,551.72</u>	
711	DC Field Trip					
	1XX	Regular Education Programs - Elementary/Secondary				
	1XXX	Instruction				
		8XX	Other Expenditures		55,955.50	
	27XX	Student Transportation Services				
		5XX	Other Purchased Services		1,839.66	
			711 Subtotal		<u>57,795.16</u>	
737	DPHHS ESSER III REOPENING GRANT					
	1XX	Regular Education Programs - Elementary/Secondary				
	25XX	Support Services - Business				
		6XX	Supplies and Materials		3,524.00	
	26XX	Operation and Maintenance of Plant Services				
		3XX	Purchased Professional and Technical Services		10,102.30	
			737 Subtotal		<u>13,626.30</u>	
775	CRRSA - State School Emergency Relief Fund II (ESSER II)					
	1XX	Regular Education Programs - Elementary/Secondary				
	1XXX	Instruction				
		6XX	Supplies and Materials		5,400.00	
	221X	Improvement of Instruction Services				
		6XX	Supplies and Materials		5,997.00	
			775 Subtotal		<u>11,397.00</u>	
777	ESSER II - Special Needs					
	1XX	Regular Education Programs - Elementary/Secondary				
	1XXX	Instruction				
		1XX	Personal Services - Salaries		1,411.00	
			777 Subtotal		<u>1,411.00</u>	
785	ARP - State School Emergency Relief Fund (ESSER III)					
	1XX	Regular Education Programs - Elementary/Secondary				
	1XXX	Instruction				
		3XX	Purchased Professional and Technical Services		150.00	
	21XX	Support Services - Students				
		6XX	Supplies and Materials		7,500.00	
785	ARP - State School Emergency Relief Fund - Basic					
	1XXX	Instruction				
		6XX	Supplies and Materials		1,110.00	
			785 Subtotal		<u>8,760.00</u>	



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Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 15

PRC	Program	Function	Object	2022 Value	2023 Value
787	ESSER III - Learning Loss				
	787 ARP - State School Emergency Relief Fund - Learning Loss				
	1XXX Instruction				
			1XX Personal Services - Salaries		5,537.50
			2XX Personal Services - Employee Benefits		3,704.09
			787 Subtotal		<u>9,241.59</u>
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					<u>241,027.76</u>

Schedule Of Changes Worksheet Fund Code 15

Beginning Fund Balance					158,959.68 (1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In					248,588.75 (2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out					241,027.76 (3)
Increase/Decrease of Reserve for Inventories					
This Year	0.00	Less Last Year	0.00 (4a)		0.00
Increase/Decrease of Reserve for Encumbrances					
This Year	630.00	Less Last Year	0.00 (4b)		630.00
					630.00 (4)
Ending Fund Balance (1 + 2 - 3 + 4)					167,150.67 (5)

Project Reporter Summaries

Project Reporter	Revenues	Expenditures	Difference
137 ART	134.40	0.00	134.40
145 MISCELLANEOUS	87,642.44	76,031.45	11,610.99
149 Facility Rental	1,740.00	0.00	1,740.00
160 LIBRARY	2,953.15	7.00	2,946.15
169 PCARD REBATE	2,879.34	0.00	2,879.34
195 BOOK FAIR- LIBRARY	0.00	1,594.04	-1,594.04
207 Excess Sale proceeds	174.77	0.00	174.77
216 Yearbook Sales	560.00	0.00	560.00
430 REAP (FY21)	-1,200.00	0.00	-1,200.00
434 Fy 22 Title I	55,036.00	59,612.50	-4,576.50
710 Field Trips	0.00	1,551.72	-1,551.72
711 DC Field Trip	57,795.16	57,795.16	0.00
737 DPHHS ESSER III REOPENING GRANT	13,626.30	13,626.30	0.00
775 CRRSA - State School Emergency Relief Fund II (ESSER II)	8,464.60	11,397.00	-2,932.40
777 ESSER II - Special Needs	1,411.00	1,411.00	0.00
785 ARP - State School Emergency Relief Fund (ESSER III)	8,130.00	8,760.00	-630.00
787 ESSER III - Learning Loss	9,241.59	9,241.59	0.00
Total	<u>248,588.75</u>	<u>241,027.76</u>	<u>7,560.99</u>



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Schedule of Revenues, Expenditures and Changes in Fund Balance

17 - Adult Education Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 17

PRC	Revenue	2022 Value	2023 Value
	1110 District Tax Levy	0.00	12,340.90
	1111 District Levy - Real Property	22,360.35	0.00
	1112 District Levy - Personal Property	108.18	0.00
	1114 District Levy - Personal Property/Mobile Homes	132.72	0.00
	1190 Penalties and Interest on Taxes	59.56	41.68
	1340 Fees for Adult Education	60.00	1,597.10
	1510 Interest Earnings	48.13	420.52
145 MISCELLANEOUS			
	1900 Other Revenue from Local Sources	0.00	100.00
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		22,768.94	14,500.20

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 17

PRC	Program	Function	Object	2022 Value	2023 Value
	610 Adult Continuing Education Programs				
		1XXX Instruction			
			1XX Personal Services - Salaries	1,116.00	2,685.00
			2XX Personal Services - Employee Benefits	232.26	58.05
			6XX Supplies and Materials	0.00	3,219.12
		23XX Support Services - General Administration			
			1XX Personal Services - Salaries	3,233.58	4,852.93
			2XX Personal Services - Employee Benefits	318.77	103.70
			5XX Other Purchased Services	799.84	22.54
		24XX Support Services - School Administration			
			4XX Purchased Property Services	0.00	150.51
		25XX Support Services - Business			
			1XX Personal Services - Salaries	3,285.10	329.47
			2XX Personal Services - Employee Benefits	208.91	2.09
		26XX Operation and Maintenance of Plant Services			
			4XX Purchased Property Services	1,680.00	319.21
			5XX Other Purchased Services	975.65	1,086.45
145 MISCELLANEOUS					
	610 Adult Continuing Education Programs				
		24XX Support Services - School Administration			
			5XX Other Purchased Services	0.00	404.40
	650 Adult Education High School Equivalency Programs				
		24XX Support Services - School Administration			
			3XX Purchased Professional and Technical Services	0.00	2,130.50
			6XX Supplies and Materials	0.00	4,941.00



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Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:	11,850.11	20,304.97
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Schedule Of Changes Worksheet

Fund Code 17

Beginning Fund Balance		18,611.85	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In		14,500.20	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out		20,304.97	(3)
Increase/Decrease of Reserve for Inventories			
This Year	0.00	Less Last Year	0.00 (4a)
		0.00	
Increase/Decrease of Reserve for Encumbrances			
This Year	0.00	Less Last Year	0.00 (4b)
		0.00	
		0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)		12,807.08	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

21 - Compensated Absence Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 21

PRC	Revenue	2022 Value	2023 Value
	1510 Interest Earnings	6.66	9.40
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		6.66	9.40

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 21

PRC	Program	Function	Object	2022 Value	2023 Value
	1XX Regular Education Programs - Elementary/Secondary				
	25XX Support Services - Business				
		1XX Personal Services - Salaries		6,795.35	0.00
		2XX Personal Services - Employee Benefits		30.40	0.00
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				6,825.75	0.00

Schedule Of Changes Worksheet Fund Code 21

Beginning Fund Balance	556.73	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In	9.40	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out	0.00	(3)
Increase/Decrease of Reserve for Inventories		
This Year	0.00	
Less Last Year	0.00	(4a)
	0.00	
Increase/Decrease of Reserve for Encumbrances		
This Year	0.00	
Less Last Year	0.00	(4b)
	0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)	566.13	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

28 - Technology Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 28

PRC	Revenue	2022 Value	2023 Value
1110	District Tax Levy	0.00	17,882.92
1111	District Levy - Real Property	18,063.80	0.00
1112	District Levy - Personal Property	85.88	0.00
1114	District Levy - Personal Property/Mobile Homes	126.84	0.00
1190	Penalties and Interest on Taxes	59.38	44.09
1510	Interest Earnings	30.10	330.42
3281	State - Technology Aid	814.83	1,061.57
6100	Material Prior Period Revenue Adjustments	89.28	0.00
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		<u>19,270.11</u>	<u>19,319.00</u>

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 28

PRC	Program	Function	Object	2022 Value	2023 Value
1XX Regular Education Programs - Elementary/Secondary					
1XXX Instruction					
			3XX Purchased Professional and Technical Services	0.00	150.00
			6XX Supplies and Materials	499.00	3,302.45
			810 Dues and Fees	300.00	0.00
258X Admin. Tech. - Technology Coordinator					
			1XX Personal Services - Salaries	7,252.80	7,935.80
			2XX Personal Services - Employee Benefits	1,477.48	1,521.92
25XX Support Services - Business					
			6XX Supplies and Materials	0.00	102.00
999 Undistributed					
9999 Undistributed					
			892 Material Prior Period Expenditure Adjustments	0.00	6,566.61
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				<u>9,529.28</u>	<u>19,578.78</u>



Trustees' Financial Summary

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16 Gallatin County

0364 Gallatin Gateway Elem

Schedule Of Changes Worksheet

Fund Code 28

Beginning Fund Balance						12,597.91 (1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In						19,319.00 (2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out						19,578.78 (3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)		0.00
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)		0.00
						0.00 (4)
Ending Fund Balance (1 + 2 - 3 + 4)						12,338.13 (5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

29 - Flexibility Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 29

PRC	Revenue	2022 Value	2023 Value
	1510 Interest Earnings	47.26	191.84
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		<u>47.26</u>	<u>191.84</u>

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 29

PRC	Program	Function	Object	2022 Value	2023 Value
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				<u>0.00</u>	<u>0.00</u>

Schedule Of Changes Worksheet

Fund Code 29

Beginning Fund Balance					11,374.95	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In					191.84	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out					0.00	(3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)	0.00	
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)	0.00	
					0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)					11,566.79	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

50 - Debt Service Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 50

PRC	Revenue	2022 Value	2023 Value
1110	District Tax Levy	0.00	48.54
1111	District Levy - Real Property	4,217.82	0.00
1112	District Levy - Personal Property	64.72	0.00
1114	District Levy - Personal Property/Mobile Homes	328.51	0.00
1190	Penalties and Interest on Taxes	253.39	18.55
1510	Interest Earnings	23.21	103.88
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		4,887.65	170.97

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 50

PRC	Program	Function	Object	2022 Value	2023 Value
1XX Regular Education Programs - Elementary/Secondary					
51XX General Obligation Bonds, Special Assessments and Interest					
			830 Special Assessments	198.30	0.00
			860 Agent Fees/Issuance Costs	0.00	198.30
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				198.30	198.30

Schedule Of Changes Worksheet

Fund Code 50

Beginning Fund Balance	6,114.62	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In	170.97	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out	198.30	(3)
Increase/Decrease of Reserve for Inventories		
This Year	0.00	
Less Last Year	0.00	(4a)
	0.00	
Increase/Decrease of Reserve for Encumbrances		
This Year	0.00	
Less Last Year	0.00	(4b)
	0.00	
	0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)	6,087.29	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

60 - Building Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 60

PRC	Revenue	2022 Value	2023 Value
	1510 Interest Earnings	9.02	36.56
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		<u>9.02</u>	<u>36.56</u>

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 60

PRC	Program	Function	Object	2022 Value	2023 Value
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				<u>0.00</u>	<u>0.00</u>

Schedule Of Changes Worksheet

Fund Code 60

Beginning Fund Balance					2,169.28	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In					36.56	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out					0.00	(3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)	0.00	
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)	0.00	
					0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)					2,205.84	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

61 - Building Reserve Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In:			Fund Code 61	
PRC	Revenue		2022 Value	2023 Value
	3283 State - School Major Maintenance Aid (SMMA)		12,005.11	11,601.85
	6100 Material Prior Period Revenue Adjustments		4,329.54	0.00
612	BUILDING RESERVE- Voted Levy			
	1110 District Tax Levy		0.00	60,000.00
	1111 District Levy - Real Property		53,627.99	0.00
	1112 District Levy - Personal Property		236.13	0.00
	1114 District Levy - Personal Property/Mobile Homes		333.49	0.00
	1190 Penalties and Interest on Taxes		82.66	25.55
	1510 Interest Earnings		400.32	3,056.78
613	BUILDING RESERVE- PERMISSIVE LEVY			
	1110 District Tax Levy		0.00	20,883.04
	1111 District Levy - Real Property		2,199.00	0.00
	1112 District Levy - Personal Property		30.15	0.00
	1114 District Levy - Personal Property/Mobile Homes		62.57	0.00
	1190 Penalties and Interest on Taxes		104.35	146.20
	1510 Interest Earnings		138.24	0.00
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:			73,549.55	95,713.42

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					Fund Code 61	
PRC	Program	Function	Object		2022 Value	2023 Value
612	BUILDING RESERVE- Voted Levy					
	1XX Regular Education Programs - Elementary/Secondary					
	26XX Operation and Maintenance of Plant Services					
			4XX Purchased Property Services		0.00	13,015.94
			7XX Property and Equipment Acquisition		14,231.00	9,175.00
	999 Undistributed					
	9999 Undistributed					
			892 Material Prior Period Expenditure Adjustments		0.00	8,840.51
613	BUILDING RESERVE- PERMISSIVE LEVY					
	1XX Regular Education Programs - Elementary/Secondary					
	26XX Operation and Maintenance of Plant Services					
			3XX Purchased Professional and Technical Services		5,393.81	0.00
			4XX Purchased Property Services		10,703.80	4,675.00
			7XX Property and Equipment Acquisition		0.00	6,074.63
	999 Undistributed					
	9999 Undistributed					
			892 Material Prior Period Expenditure Adjustments		0.00	11,159.78



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Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					Fund Code 61	
PRC	Program	Function	Object		2022 Value	2023 Value
680	Building Reserve - Voted Levy					
	1XX Regular Education Programs - Elementary/Secondary					
		26XX Operation and Maintenance of Plant Services				
			6XX Supplies and Materials		0.00	195.26
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:					30,328.61	53,136.12

Schedule Of Changes Worksheet					Fund Code 61	
Beginning Fund Balance					160,920.08	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In					95,713.42	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out					53,136.12	(3)
Increase/Decrease of Reserve for Inventories						
	This Year	0.00	Less Last Year	0.00	(4a)	0.00
Increase/Decrease of Reserve for Encumbrances						
	This Year	0.00	Less Last Year	0.00	(4b)	0.00
					0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)					203,497.38	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

81 - Private Purpose Trust (spend interest only)

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 81

PRC	Revenue	2022 Value	2023 Value
	1510 Interest Earnings	5.45	25.81
	6100 Material Prior Period Revenue Adjustments	0.00	0.92
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		<u>5.45</u>	<u>26.73</u>

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 81

PRC	Program	Function	Object	2022 Value	2023 Value
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				<u>0.00</u>	<u>0.00</u>

Schedule Of Changes Worksheet

Fund Code 81

Beginning Fund Balance					1,529.68	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In					26.73	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out					0.00	(3)
Increase/Decrease of Reserve for Inventories						
This Year	0.00	Less Last Year	0.00	(4a)	0.00	
Increase/Decrease of Reserve for Encumbrances						
This Year	0.00	Less Last Year	0.00	(4b)	0.00	
					0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)					1,556.41	(5)



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Schedule of Revenues, Expenditures and Changes in Fund Balance

84 - Student Extracurricular Activities Fund

Current Revenues, Other Financing Sources and Residual Equity Transfers In: Fund Code 84

PRC	Revenue	2022 Value	2023 Value
	1510 Interest Earnings	95.13	112.58
	1700 Student Extracurricular Activity Receipts	56,069.62	16,136.46
	6100 Material Prior Period Revenue Adjustments	45.00	0.00
149	Facility Rental		
	1700 Student Extracurricular Activity Receipts	0.00	50.00
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In:		<u>56,209.75</u>	<u>16,299.04</u>

Current Expenditures, Other Financing Uses and Residual Equity Transfers Out: Fund Code 84

PRC	Program	Function	Object	2022 Value	2023 Value
	7XX		Extracurricular Athletics and Activities		
		3XXX	Operation of Non-Educational Services		
			XXX Student Extracurricular	43,386.60	165.01
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out:				<u>43,386.60</u>	<u>165.01</u>

Schedule Of Changes Worksheet Fund Code 84

Beginning Fund Balance	27,961.96	(1)
Total Current Revenues, Other Financing Sources and Residual Equity Transfers In	16,299.04	(2)
Total Current Expenditures, Other Financing Uses and Residual Equity Transfers Out	165.01	(3)
Increase/Decrease of Reserve for Inventories		
This Year	0.00	
Less Last Year	0.00	(4a)
Increase/Decrease of Reserve for Encumbrances		
This Year	0.00	
Less Last Year	0.00	(4b)
	0.00	(4)
Ending Fund Balance (1 + 2 - 3 + 4)	44,095.99	(5)



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Detail Expenditure

Fund	Account	Description	2022 Value	2023 Value
XX	280 1XXX 112	Certified Teacher Staff Salaries	39,686.00	42,821.00
XX	XXX 1XXX 112	Certified Teacher Staff Salaries	544,151.52	564,597.34
XX	XXX 1XXX 650	Periodicals - Not On-Line Subscriptions	128.95	4,937.70
XX	XXX 26XX 41X	Energy Utility Services	28,689.86	40,704.79
XX	XXX XXXX 535	Technology Communication Services	752.14	16.55
XX	XXX XXXX 682	Technology Supplies	4,262.00	2,529.88
XX	XXX XXXX 561	Tuition to Other School Districts Within the State	0.00	0.00
XX	XXX 4XXX 715	Land Improvements	0.00	0.00
XX	XXX XXXX 564	Educational Fees to In-State Treatment Facilities	0.00	0.00
XX	451 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00
XX	457 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00
XX	XXX XXXX 563	Educational Fees to Detention Facilities	0.00	0.00
XX	427 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00
XX	XXX 4XXX 720	Purchase of Existing Buildings	0.00	0.00
XX	39X 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00
XX	432 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00
XX	XXX 4XXX 725	Major Construction Services	0.00	0.00
XX	XXX 4XXX 710	Land	0.00	0.00
XX	458 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00
XX	XXX 1XXX 640	Textbooks and Other Printed Materials - No On-line Services	20,046.96	0.00
XX	XXX 4XXX 74X	Major Equipment-Replacement	0.00	0.00
XX	XXX XXXX 355	Technology Contracted Services	1,679.40	0.00
XX	456 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00
XX	XXX XXXX 562	Tuition to Other School Districts Outside the State	0.00	0.00
XX	XXX XXXX 735	Technology Equipment and Software	0.00	0.00
XX	XXX XXXX 455	Technology Repairs and Rental	0.00	0.00
XX	210 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00
XX	XXX 4XXX 73X	Major Equipment-New	0.00	0.00
XX	260 1XXX 112	Certified Teacher Staff Salaries	0.00	0.00



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Special Education Reversion

Special Education Allowable Cost Payments:

a. Instructional Block Grant Entitlement	24,852.61
b. Related Services Block Grant Entitlement	0.00
c. Total Entitlements Subject to Reversion	24,852.61

Prorated Cooperative Cost Payments:

d. Related Services Block Grant Entitlement (paid to coop)	8,283.66
e. Minimum Special Education Expenditures to Avoid Reversion [(c) * (1.33)] + [(d) * (0.33)]	35,787.58
f. Grand Total Allowable Special Education Expenditures (See attached worksheet)	51,739.44
g. Special Education Reversion Amount If f = 0 then c = reversion ELSE If (e - f) is > 0, then [(e - f) * 0.75] = reversion	0.00

Note to District:

If the amount on Line (g) is greater than zero, revenue source code 3115 State Special Education Allowable Cost Payment to Districts in the General Fund (01) will be reduced automatically. The amount will be used to fund the special education allowable cost entitlement next year. Include the reverted amount on the General Fund (01) balance sheet in Deferred Inflows (680).

Remember:

The Deferred Inflow(680) entry for the reverted amount in the General Fund (01) will need to be removed in the next fiscal year.

Local and state special education resource transfers to the coop must be coded as follows: XXX-280-62XX-920.

Percentage of Special Ed Funding FY2025 Maximum Budget: 100%



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Special Education Reversion

Program	Function	Object	Fund 01	Fund 13	Fund 24	Fund 25	Fund 26
280	1XXX	1XX	42,821.00	0.00	0.00	0.00	0.00
280	1XXX	2XX	7,551.63	0.00	0.00	0.00	0.00
280	1XXX	3XX	0.00	0.00	0.00	0.00	0.00
280	1XXX	4XX	0.00	0.00	0.00	0.00	0.00
280	1XXX	5XX	0.00	0.00	0.00	0.00	0.00
280	1XXX	6XX	0.00	0.00	0.00	0.00	0.00
280	1XXX	7XX	0.00	0.00	0.00	0.00	0.00
280	21XX	1XX	0.00	0.00	0.00	0.00	0.00
280	21XX	2XX	0.00	0.00	0.00	0.00	0.00
280	21XX	3XX	0.00	0.00	0.00	0.00	0.00
280	21XX	4XX	0.00	0.00	0.00	0.00	0.00
280	21XX	5XX	0.00	0.00	0.00	0.00	0.00
280	21XX	6XX	0.00	0.00	0.00	0.00	0.00
280	21XX	7XX	0.00	0.00	0.00	0.00	0.00
280	221X	1XX	0.00	0.00	0.00	0.00	0.00
280	221X	2XX	0.00	0.00	0.00	0.00	0.00
280	221X	3XX	0.00	0.00	0.00	0.00	0.00
280	221X	4XX	0.00	0.00	0.00	0.00	0.00
280	221X	5XX	0.00	0.00	0.00	0.00	0.00
280	221X	6XX	0.00	0.00	0.00	0.00	0.00
280	221X	7XX	0.00	0.00	0.00	0.00	0.00
280	222X	1XX	0.00	0.00	0.00	0.00	0.00
280	222X	2XX	0.00	0.00	0.00	0.00	0.00
280	222X	3XX	0.00	0.00	0.00	0.00	0.00
280	222X	4XX	0.00	0.00	0.00	0.00	0.00
280	222X	5XX	0.00	0.00	0.00	0.00	0.00
280	222X	6XX	0.00	0.00	0.00	0.00	0.00
280	222X	7XX	0.00	0.00	0.00	0.00	0.00
280	24XX	1XX	0.00	0.00	0.00	0.00	0.00
280	24XX	2XX	0.00	0.00	0.00	0.00	0.00
280	24XX	3XX	0.00	0.00	0.00	0.00	0.00
280	24XX	4XX	0.00	0.00	0.00	0.00	0.00
280	24XX	5XX	0.00	0.00	0.00	0.00	0.00
280	24XX	6XX	0.00	0.00	0.00	0.00	0.00
280	24XX	7XX	0.00	0.00	0.00	0.00	0.00
280	62XX	920	1,366.81	0.00	0.00	0.00	0.00
Totals			51,739.44	0.00	0.00	0.00	0.00

51,739.44

Be sure costs have been properly allocated between the elementary and high school district, if appropriate. Expenditures in Object 8XX are not allowable. Expenditures in function 24XX and Objects 1XX and 2XX are only allowable if the district employs a certified special education director. ARM 10.16.3136

*Expenditures under 24XX 1XX/2XX are excluded from the total when there is not a certified special education director as reported for FY23 in TEAMS.



Trustees' Financial Summary

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Schedule of Changes in Fixed Assets, Depreciation, and Net Fixed Assets

Governmental	Beginning Balance	Adjust- ments	Additions	Removals	Ending Balance
Land	58,361.00	0.00	0.00	0.00	58,361.00
Land Improvements	123,536.58	0.00	0.00	0.00	123,536.58
Buildings	1,775,830.00	0.00	0.00	0.00	1,775,830.00
Machinery and Equipment	74,137.07	0.00	0.00	0.00	74,137.07
Totals at Historical Cost	2,031,864.65	0.00	0.00	0.00	2,031,864.65
Governmental Activities, Capital Assets, Net of Accumulated Depreciation	2,031,864.65	0.00	0.00	0.00	2,031,864.65

* Governmental activities are usually reported in the general, special revenue, debt service, capital projects, permanent, and internal service funds. These funds are generally financed through taxes, intergovernmental revenues and other non-exchange revenues.

** Business-type activities are usually reported in the enterprise funds. These funds are financed in whole or in part by fees charged to external parties for goods and services.

*** Has comments.



Trustees' Financial Summary

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Schedule of Changes in Long-Term Liabilities

	(a) Beginning Balance 7/1/2022	(b) New Debt & Other Additions	(c) Principal Payments	(d) Refunding & Other Reduction	(e) Ending Balance (6/30/2023) [a+b-c-d]	(f) Current Portion Due FY2024	(g) Long-Term Portion Due FY2025
Governmental Activities *							
Compensated Absences	52,595.03	0.00	0.00	0.00	52,595.03	0.00	0.00
Total Governmental Activity							
Non-bond Long-Term Liabilities	52,595.03	0.00	0.00	0.00	52,595.03	0.00	0.00

* Governmental activities are usually reported in the general, special revenue, debt service, capital projects, permanent, and internal service funds. These funds are generally financed through taxes, intergovernmental revenues and other non-exchange revenues.

** Business-type activities are usually reported in the enterprise funds. These funds are financed in whole or in part by fees charged to external parties for goods and services.



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Net Pension Liability FY2023

	<u>Beginning Balance</u>	<u>Additions</u>	<u>Reductions</u>	<u>Ending Balance</u>
Governmental				
Net Pension - PERS	170,256.00	36,024.00	0.00	206,280.00
Net Pension - TRS	972,335.00	137,837.00	0.00	1,110,172.00

Old Business
ACTION ITEM

Proposed Budget for 23-24

Presented by: Brittney Bateman and Kelly Henderson

Background (to include funding source if applicable):

Recommendation: Administration recommends approval of the proposed budget for the 23-24 fiscal year.



Budget Report

FY 2024

16 Gallatin

Submit ID:

0364 Gallatin Gateway Elem

Due Dates:

Board of Trustees adopts Final Budget no later than August 25th before: computation of GF levy requirement by Cty Supt. & the fixing of district tax levies. (MCA 20-9-131)

Board of Trustees transmits to County Supt. within 3 days after final approval. (MCA 20-9-131)

County Supt. transmits to County Commissioners by the later of the 1st Tuesday in September or within 30 calendar days after receipt of certified taxable values. (MCA 20-9-142)

County Supt. transmits to Office of Public Instruction on or before September 15th. (MCA 20-9-134)

District ANB And Taxable Valuation

	ANB		Taxable Valuation
	EL	HS	
District:	* 159	N/A	15,029,994

* indicates that the 3 year average ANB was used to calculate the budget limitations

The final budget is approved as set forth in this document.

Certification

District Clerk:

Brittney Bateman

(Signature)

(Date)

Chairperson, School Trustees:

Aaron Schwieterman

(Signature)

(Date)

County Superintendent:

John Nielson

(Signature)

(Date)

Chairperson, County Commissioners:

(Print)

(Signature)

(Date)

Name of Contact:

(Print)

(Signature)

(Phone)



Budget Report

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Summary

Fund [A]	Adopted Budget [B]	Total Reserves (961-966) [C]	Reserve Limit [D]	% of Adopted Budget Reserved (C/B) x 100 [E]	Unreserved Fund Balance Reappropriated (970) [F]	Other Revenue [G]	District Property Tax Requirements (B - F - G = H) If < 0, enter 0 [H]	District Mill Levies H / (TV x .001) [I]
01 General	1,343,793.61	94,366.93	10%	7.02%	0.00	792,257.33	551,536.28	36.70
10 Transportation	135,690.00	27,138.00	20%	20.00%	13,419.17	19,273.32	102,997.51	6.85
11 Bus Depreciation Reserve	157,883.30	0.00	N/A	0.00%	128,261.13	0.00	29,622.17	1.97
13 Tuition	15,173.12		N/A		15,173.12	0.00	0.00	0.00
14 Retirement	226,600.00	45,320.00	20%	20.00%	34,369.87	192,230.13		
17 Adult Education	27,000.00	8,400.00	35%	31.11%	4,407.08	0.00	22,592.92	1.50
19 Non-Operating	0.00	0.00	N/A	0.00%	0.00	0.00	0.00	0.00
28 Technology	31,361.41	0.00	N/A	0.00%	12,338.13	1,023.28	18,000.00	1.20
29 Flexibility	11,566.79	0.00	N/A	0.00%	11,566.79	0.00	0.00	0.00
61 Building Reserve	296,867.38	0.00	N/A	0.00%	203,497.38	11,574.43	81,795.57	5.44
Total of All Funds	2,245,935.61	175,224.93			423,032.67	1,016,358.49	806,544.45	53.66

50 Debt Service								
Tax Jurisdiction								
1	0.00	0.00	20-9-438	0.00%	6,087.29	0.00	0.00	0.00



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General Fund Limits And Reserves Worksheet

PART I. Certified Budget Data

ANB By Budget Unit:	E1	GALLATIN GATEWAY K-6	118 *
	M1	GALLATIN GATEWAY 7-8	41 *

* indicates that the 3 year average ANB was used to calculate the budget limitations

A.	Direct State Aid	(I-A)	542,614.37
B.	Mandatory Non-isolated Levy	(I-B)	0.00
C.	Quality Educator	(I-C)	58,375.42
D.	At Risk Student	(I-D)	2,412.30
E.	Indian Education For All	(I-E)	3,801.69
F.	American Indian Achievement Gap	(I-F)	940.00
G.	Data For Achievement	(I-G)	3,639.51
H.	State Special Education Allowable Cost Payment to Districts	(I-H)	23,285.71
I.	State Special Education Related-Services Payment To Coop	(I-I)	7,761.40
J.	District GTB Subsidy Per Elementary Base Mill	(I-J)	6,315.00
K.	District GTB Subsidy Per High School Base Mill	(I-K)	N/A

PART II. General Fund Budget Limits

Prior Year Budget Data:

A.	ANB	(II-A)	167
B.	BASE Budget Limit	(II-B)	1,087,425.53
C.	Maximum Budget Limit	(II-C)	1,351,226.40
D.	Over-BASE Levy As Submitted on Budget	(II-D)	263,800.87
E.	Adopted Budget	(II-E)	1,351,226.40

Current Year Budget Data:

F.	% Special Education in Maximum Budget	(II-F)	100%
G.	BASE Budget (Minimum Budget Amount Required)	(II-G)	1,075,995.39
H.	Maximum Budget Limit	(II-H)	1,337,404.14
I.	Highest Budget Without a Vote	(II-I)	1,343,793.61
J.	Highest Budget	(II-J)	1,363,520.51
K.	Highest Voted Amount	(II-K)	19,726.90
L.	Amount Approved on Ballot by Voters	(II-L)	0.00
M.	Adopted Budget	(II-M)	1,343,793.61



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PART III. General Fund Balance For Budget As Of June 30

A.	Operating Reserve (961)	(III-A)		94,366.93
B.	TIF Operating Reserve (962)	(III-B)		0.00
C.	Excess Reserves	(III-C)		0.00
1.	Reserve For Protested/Delinquent Taxes (963)	(III-C1)	0.00	
2.	Reserve For Tax Audit Receipts (964)	(III-C2)	0.00	
D.	Unreserved Fund Balance Reappropriated (970)	(III-D)		0.00
1.	Prior Year Excess Reserves Funding Over-BASE (970a)	(III-D1)	0.00	
2.	Remaining Fund Balance Available (970b)	(III-D2)	0.00	
3.	TIF Fund Balance Reappropriated (970c)	(III-D3)	0.00	
E.	TOTAL GENERAL FUND BALANCE FOR BUDGET (TFS48)	(III-E)		94,366.93

PART V. General Fund Worksheet

General Fund Budget:

A.	Adopted General Fund Budget	(V-A)		1,343,793.61
1.	BASE Budget Limit	(V-A1)	1,075,995.39	
2.	Over-BASE Budget	(V-A2)	267,798.22	

Funding The BASE Budget:

B.	Direct State Aid	(V-B)		542,614.37
1.	Direct State Aid Paid By State	(V-B1)	542,614.37	
2.	Direct State Aid Paid By Non-Isolated District	(V-B2)	0.00	
C.	Quality Educator	(V-C)		58,375.42
D.	At Risk Student	(V-D)		2,412.30
E.	Indian Education For All	(V-E)		3,801.69
F.	American Indian Achievement Gap	(V-F)		940.00
G.	Data For Achievement	(V-G)		3,639.51
H.	Special Education Allowable Cost Payment	(V-H)		23,285.71
I.	Remaining Fund Balance Available	(V-I)		0.00
J.	Non-Levy Revenue and Funding Sources	(V-J)		37,961.13
1.	Actual Non-Levy Revenue	(V-J1)	37,961.13	
2.	Anticipated Non-Levy Revenue	(V-J2)	0.00	
3.	TIF Applied To BASE Budget	(V-J3)	0.00	
4.	Excess Levy BASE	(V-J4)	0.00	
K.	Other Non-Levy Revenue and Funding Sources	(V-K)		0.00
L.	BASE Levy Requirements	(V-L)		402,965.26
1.	State - Guaranteed Tax Base Aid	(V-L1)	119,227.20	
2.*	District Property Tax Levy To Fund BASE (BASE Levy)	(V-L2)	283,738.06	
M.	**Subtotal of BASE Budget Revenue	(V-M)		1,075,995.39

Funding The Over-BASE Budget:

N.	Fund Balance & Non-Levy Revenue Available To Fund Over-BASE	(V-N)		0.00
O.	Over-BASE Only Revenues and Funding Sources	(V-O)		0.00
1.	Prior Year Excess Reserves Reappropriated (Over-BASE Only)	(V-O1)	0.00	
2.	Tuition	(V-O2)	0.00	



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3.	Flexible Non-Voted Levy Authority Transferred from Other Funds	(V-O3)	0.00	
4.	Oil & Gas Revenues	(V-O4)	0.00	
5.	TIF Applied To Over-BASE Budget	(V-O5)	0.00	
6.	Excess Levy Over-BASE	(V-O6)	0.00	
P.	District Property Tax Levy To Fund Over-BASE Budget (Over-BASE Levy)(GF)	(V-P)		267,798.22
Q.	Subtotal of Over-BASE Revenue and Funding Sources	(V-Q)		267,798.22

Mill Levies:

R.	District Non-Isolated Mills	(V-R)		0.00
S.	BASE Mills - Elementary	(V-S)		18.88
T.	BASE Mills - High School	(V-T)		0.00
U.	Over-BASE Mills	(V-U)		17.82
	1. District Property Tax Levy Mills	(V-U1)	17.82	
	2. Flexible Non-Voted Levy Authority	(V-U2)	0.00	
V.	Total General Fund Mills	(V-V)		36.70

* Should be approximately equal to (Taxable Value X .001) X BASE Mills

** BASE Budget Revenue cannot exceed BASE Budget Limit. Excess BASE Budget Revenue is reported on line V-O and is applied to the Over-BASE Budget



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01 General Fund

Adopted Budget	0001	1,343,793.61
Budget Uses		
Expenditure Budget	0002	1,343,793.61
Add To Fund Balance	0003	0.00
TIF Fund Balance for Budget	TFS47	0.00
Estimated Funding Sources		
Unreserved Fund Balance Reappropriated	0970	0.00
Direct State Aid	3110	542,614.37
Quality Educator	3111	58,375.42
At Risk Student	3112	2,412.30
Indian Education For All	3113	3,801.69
American Indian Achievement Gap	3114	940.00
State Special Education Allowable Cost Payment to Districts	3115	23,285.71
Data For Achievement	3116	3,639.51
State - Guaranteed Tax Base Aid	3120	119,227.20
Actual Non-levy Revenue and Funding Sources		
Tax Title and Property Sales	1130	0.00
Interest Earnings	1510	2,462.80
Revenue from Community Services Activities	1800	0.00
Other Revenue from Local Sources	1900	35,498.33
Rentals	1910	0.00
Dormitory Charges	1915	0.00
Contributions/Donations from Private Sources	1920	0.00
Textbook Sales and Rentals	1940	0.00
Fees - Users/Resale of Supplies	1945	0.00
Services Provided Other School Districts or Coops	1950	0.00
Services Provided Other Local Governmental Units	1960	0.00
Summer School Fees	1981	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Anticipated Non-levy Revenue and Funding Sources - BASE		
Oil & Gas Revenues - BASE Budget	0171	0.00
TIF Applied To BASE Budget	0174	0.00
Coal Gross Proceeds	1123	0.00
School Block Grant Coal Mitigation	3449	0.00
Federal Revenue in Lieu of Taxes	4800	0.00



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Anticipated Non-levy Revenue and Funding Sources - Over-BASE

Oil & Gas Revenues - Over-BASE Budget	0172	0.00
TIF Applied To Over-BASE Budget	0175	0.00
Individual Tuition	1310	0.00
Tuition from School Districts Within State	1320	0.00
Tuition from School Districts Outside State	1330	0.00
State - Tuition for State Placement	3117	0.00

Other Non-levy Revenue

District Levy - Distribution of Prior Year Protested/Delinquent Taxes	1117	0.00
District Levy - Dept. or Revenue Tax Audit Receipts	1118	0.00
Penalties and Interest on Taxes	1190	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00

Levies

Mandatory Non-isolated Levy	1110(a)	0.00	
BASE Levy	1110(b)	283,738.06	
Over-BASE Levy	1110(c)	267,798.22	
District Tax Levy		1110	551,536.28
Total Estimated Revenues to Fund Adopted Budget		0004	1,343,793.61
Estimated Revenues Exceeding Adopted Budget		0004a	0.00



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10 Transportation Fund

Adopted Budget	0001	135,690.00
Budget Uses		
Expenditure Budget	0002	135,690.00
Add To Fund Balance	0003	0.00
Transportation Schedule Data		
On-Schedule	0005	17,521.20
Contingency	0006	1,752.12
Over-Schedule	0011	116,416.68
Fund Balance for Budget	TFS48	40,557.17
Operating Reserve	0961	27,138.00
Unreserved Fund Balance Reappropriated	0970	13,419.17
Estimated Funding Sources		
Coal Gross Proceeds	1123	0.00
Individual Transportation Fees	1410	0.00
Transportation Fees from Other School Districts Within State	1420	0.00
Transportation Fees from Other School Districts Outside State	1430	0.00
Other Transportation Fees	1440	0.00
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
State - Tuition for State Placement	3117	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Montana Oil and Gas Tax	3460	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
Reimbursements		
County On-Schedule Transportation Reimbursement	2220	9,636.66
State - On-Schedule Transportation Reimbursement	3210	9,636.66
District Tax Levy	1110	102,997.51
District Mills	999	6.85
Total Estimated Revenues to Fund Adopted Budget	0004	135,690.00
Estimated Revenues Exceeding Adopted Budget	0004a	0.00



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11 Bus Depreciation Reserve Fund

Adopted Budget	0001	157,883.30
Budget Uses		
Expenditure Budget	0002	157,883.30
Add To Fund Balance	0003	0.00
TIF Fund Balance for Budget	TFS47	0.00
Fund Balance for Budget	TFS48	128,261.13
Operating Reserve	0961	0.00
Unreserved Fund Balance Reappropriated	0970	128,261.13
TIF Fund Balance Reappropriated	0973	0.00
Estimated Funding Sources		
Coal Gross Proceeds	1123	0.00
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Montana Oil and Gas Tax	3460	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
Use Estimated Non-levy Revenue to Lower Levies? (Yes or No)		No
District Tax Levy	1110	29,622.17
District Mills	999	1.97
Total Estimated Revenues to Fund Adopted Budget	0004	157,883.30

Asset Information

Asset ID	Year Of Purchase	Original Cost	Depreciated Thru Last Year	20% Limit	Amount Depreciated
2020 ICRP (International)	2020	80,810.87	64,648.68	16,162.17	16,162.17
2018 BLUE BIRD	2017	67,300.00	80,760.00	13,460.00	13,460.00
Total					29,622.17



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13 Tuition Fund

Adopted Budget	0001	15,173.12
Budget Uses		
Expenditure Budget	0002	15,173.12
Add To Fund Balance	0003	0.00
Fund Balance for Budget	TFS48	15,173.12
Unreserved Fund Balance Reappropriated	0970	15,173.12
Estimated Funding Sources		
Coal Gross Proceeds	1123	0.00
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
Direct State Aid	3110	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Montana Oil and Gas Tax	3460	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
District Tax Levy	1110	0.00
District Mills	999	0.00
Total Estimated Revenues to Fund Adopted Budget	0004	15,173.12
Estimated Revenues Exceeding Adopted Budget	0004a	0.00



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14 Retirement Fund

Adopted Budget	0001	226,600.00
Budget Uses		
Expenditure Budget	0002	226,600.00
Add To Fund Balance	0003	0.00
Fund Balance for Budget	TFS48	79,689.87
Operating Reserve	0961	45,320.00
Unreserved Fund Balance Reappropriated	0970	34,369.87
Estimated Funding Sources		
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
County Retirement Distribution	2240	192,230.13
Total Estimated Revenues to Fund Adopted Budget	0004	226,600.00
Estimated Revenues Exceeding Adopted Budget	0004a	0.00



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17 Adult Education Fund

Adopted Budget	0001	27,000.00
Budget Uses		
Expenditure Budget	0002	27,000.00
Add To Fund Balance	0003	0.00
Fund Balance for Budget	TFS48	12,807.08
Operating Reserve	0961	8,400.00
Unreserved Fund Balance Reappropriated	0970	4,407.08
Estimated Funding Sources		
Coal Gross Proceeds	1123	0.00
Fees for Adult Education	1340	0.00
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Montana Oil and Gas Tax	3460	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
District Tax Levy	1110	22,592.92
District Mills	999	1.50
Total Estimated Revenues to Fund Adopted Budget	0004	27,000.00
Estimated Revenues Exceeding Adopted Budget	0004a	0.00



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19 Non-Operating Fund

Adopted Budget	0001	0.00
Budget Uses		
Expenditure Budget	0002	0.00
Add To Fund Balance	0003	0.00
Transportation Schedule Data		
On-Schedule	0005	0.00
Contingency	0006	0.00
Over-Schedule	0011	0.00
Fund Balance for Budget	TFS48	0.00
Operating Reserve	0961	0.00
Unreserved Fund Balance Reappropriated	0970	0.00
Estimated Funding Sources		
Coal Gross Proceeds	1123	0.00
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Montana Oil and Gas Tax	3460	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
Reimbursements		
County On-Schedule Transportation Reimbursement	2220	0.00
State - On-Schedule Transportation Reimbursement	3210	0.00
District Tax Levy	1110	0.00
District Mills	999	0.00
Total Estimated Revenues to Fund Adopted Budget	0004	0.00
Estimated Revenues Exceeding Adopted Budget	0004a	0.00



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28 Technology Fund

Adopted Budget	0001	31,361.41
Budget Uses		
Expenditure Budget	0002	31,361.41
Add To Fund Balance	0003	0.00
TIF Fund Balance for Budget	TFS47	0.00
Fund Balance for Budget	TFS48	12,338.13
Operating Reserve	0961	0.00
Unreserved Fund Balance Reappropriated	0970	12,338.13
TIF Fund Balance Reappropriated	0973	0.00
Estimated Funding Sources		
Coal Gross Proceeds	1123	0.00
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Montana Oil and Gas Tax	3460	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
State - Technology Aid	3281	1,023.28
District Tax Levy	1110	18,000.00
District Mills	999	1.20
Total Estimated Revenues to Fund Adopted Budget	0004	31,361.41
Estimated Revenues Exceeding Adopted Budget	0004a	0.00



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29 Flexibility Fund

Adopted Budget	0001	11,566.79
Budget Uses		
Expenditure Budget	0002	11,566.79
Add To Fund Balance	0003	0.00
Fund Balance for Budget	TFS48	11,566.79
Operating Reserve	0961	0.00
Unreserved Fund Balance Reappropriated	0970	11,566.79
Estimated Funding Sources		
Coal Gross Proceeds	1123	0.00
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Montana Oil and Gas Tax	3460	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
State - Transformational Learning Aid	3760	0.00
State - Advanced Opportunity Aid	3770	0.00
Transfers for Transformational Learning	5304	0.00
District Tax Levy	1110	0.00
District Mills	999	0.00
Total Estimated Revenues to Fund Adopted Budget	0004	11,566.79
Estimated Revenues Exceeding Adopted Budget	0004a	0.00



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50 Debt Service Fund

1

Taxable Value		15,029,994.00
Adopted Budget	0001	0.00
Budget Uses		
Expenditure Budget	0002	0.00
Add To Fund Balance	0003	0.00
TIF Fund Balance for Budget	TFS47	0.00
Fund Balance for Budget	TFS48	6,087.29
Fund Balance In Sinking Fund	0960	0.00
Operating Reserve	0961	0.00
Unreserved Fund Balance Reappropriated	0970	6,087.29
TIF Fund Balance Reappropriated	0973	0.00
Estimated Funding Sources		
Coal Gross Proceeds	1123	0.00
Interest Earnings	1510	0.00
Other Revenue from Local Sources	1900	0.00
State - Payment in Lieu of Taxes - FWP	3302	0.00
Montana Oil and Gas Tax	3460	0.00
Other Revenue	9100	0.00
Residual Equity Transfers In	9710	0.00
District Tax Levy	1110	0.00
Jurisdiction Mills	999	0.00
Total Estimated Revenues to Fund Adopted Budget	0004	0.00
Estimated Revenues Exceeding Adopted Budget	0004a	6,087.29



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61 Building Reserve Fund

Adopted Budget		0001	296,867.38
Budget Uses			
Expenditure Budget		0002	296,867.38
Add To Fund Balance		0003	0.00
TIF Fund Balance for Budget		TFS47	0.00
Fund Balance for Budget		TFS48	203,497.38
Operating Reserve		0961	0.00
Unreserved Fund Balance Reappropriated		0970	203,497.38
TIF Fund Balance Reappropriated		0973	0.00
Estimated Funding Sources			
Coal Gross Proceeds		1123	0.00
BR Permissive Revenues - Coal Gross Proceeds		1125	0.00
Tax Title and Property Sales		1130	0.00
BR Permissive Revenues - Tax Title and Property Sales		1131	0.00
Interest Earnings		1510	0.00
BR Permissive Revenues - Interest Earnings		1511	0.00
Other Revenue from Local Sources		1900	0.00
BR Permissive Revenues - Other Revenue from Local Sources		1901	0.00
State - School Major Maintenance Aid (SMMA)		3283	11,574.43
State - Payment in Lieu of Taxes - FWP		3302	0.00
BR Permissive Revenues - State Payment in Lieu of Taxes-FWP		3303	0.00
Montana Oil and Gas Tax		3460	0.00
BR Permissive Revenues - Montana Oil and Gas Tax		3461	0.00
Other Revenue		9100	0.00
BR Permissive Revenues - Other Revenue		9101	0.00
Residual Equity Transfers In		9710	0.00
Use Estimated Non-levy Revenue to Lower Levies? (Yes or No)			No
Building Reserve Voted Levy	1110(a)	60,000.00	
Building Reserve Permissive Levy	1110(b)	21,795.57	
District Tax Levy		1110	81,795.57
District Mills		999	5.44
Building Reserve Voted Mills		0134	3.99
Building Reserve Permissive Mills		0135	1.45
Total Estimated Revenues to Fund Adopted Budget		0004	296,867.38

Voted Reserve Authorities

Election Date	Total Authorized	Years Authorized	Levy Type	Levied Thru Last Year	Maximum Levy	Levy Amount
05/03/2022	300,000.00	5	612	60,000.00	60,000.00	60,000.00
Total						60,000.00

Old Business
ACTION ITEM

Policy Series 1000 - Second Reading

Presented by: Kelly Henderson

Background (to include funding source if applicable): This is the second reading of policy series 1000.

Policy 1005 - FE Make changes to the proficiency definitions to include standards based grading.

Policy 1310 - R Add emergency policy adoption language

Policy 1511 Add to yearly review at a regular board meeting

Recommendation: Administration recommends approval of Policy Series 1000.

IN GATEWAY SCHOOL DISTRICT

**1000 SERIES
THE BOARD OF TRUSTEES**

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	1005FE	Proficiency Based Learning
	1006FE	Transfers for School Safety
	1009FE	Recruitment and Retention
	1014FE	Intent to Increase Non-Voted Levy
	1014FE-F1	Notice of Intent to Impose an Increase in Levies
	1015FE	Personalized Learning Policy
	1016FE	Independent Investment Accounts
R	1105	Membership
	1110	Taking Office
	1111	Election
	1112	Resignation
	1113	Vacancies
	1120	Annual Organization Meeting
	1130	Committees
	1210	Qualifications, Terms, and Duties of Board Officers
	1230	Clerk
R	1240	Duties of Individual Trustees
R	1310	District Policy and Procedures
R	1400	Board Meetings
	1401	Records Available to Public
	1402	School Board Use of Electronic Mail
R	1420	School Board Meeting Procedure
	1420F	Assumption of Risk Form
	1425	Abstentions From Voting
R	1441	Audience Participation
	1510	Goals and Objectives
	1511	Code of Ethics for School Board Members
	1512	Conflict of Interest
	1512F	Relationships Defined and Chart
R	1513	Management Rights
	1520	Board/Staff Communications
R	1521	Board-Superintendent Relationship
	1531	Trustee Expenses
R	1610	Annual Goals and Objectives
	1620	Evaluation of Board
	1621	In-Service Conference for Trustees
	1635	Internships
R	1700	Uniform Complaint Procedure

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on: 6/26/17

1000 - R

BOARD OF TRUSTEES

Revised on: 06/15/15

Legal Status, Operation and Organization

The legal name of this District is Gallatin Gateway School District No. 35, Gallatin County, State of Montana. The District is classified as a class three district and is operated according to the laws and administrative rules pertaining to a class three district.

The Board of Trustees of Gallatin Gateway School District No. 35 is the governmental entity established by the state of Montana and constitutionally charged of the supervision and control of all aspects of the District's operations.

To achieve its primary goal of providing each child with a basic system of free quality education as required by Montana Law, the Board shall exercise the full authority granted to it by the laws of the state. Its legal powers, duties, and responsibilities are derived from the Montana Constitution and state statutes and administrative rules.

Policies of the District define and frame the manner via which the District conducts its official business. The policies of the District are modified/updated from time to time to reflect the operation of the District.

All handbooks approved by the Board are regarded as and given the same significance as District policy.

Legal Reference:	§ 20-3-323, MCA	District policy and record of acts
	§ 20-3-324, MCA	Powers and duties
	§ 20-6-101, MCA	Definition of elementary and high school districts
	§ 20-6-201, MCA	Elementary district classification
	§ 20-9-309, MCA	Basic system of free quality public elementary and secondary schools defined – identifying educationally relevant factors – establishment of funding formula and budgetary structure – legislative review
	Article X, Section 8,	MT Constitution

Gallatin Gateway Elementary

Adopted on: 2/19/20

Reviewed on:

Revised on:

1005FE

FLEXIBILITY AND EFFICIENCY

Proficiency-Based ANB

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing the provision of law allowing proficiency-based ANB.

The school district has a definition of proficiency within the meaning of that term as used in 20-9-311(4)(d). The definition must not require seat time as a condition or other element of determining proficiency. The definition must be incorporated in the district's policies and must be used for purposes of determining content and course mastery and other progress, promotion from grade to grade, grades, and graduation for pupils enrolled in the district's transformational learning program.

Definition of Proficiency

For purposes of this policy, the term “proficiency” means a degree of mastery of the underlying content for a course that is reflective of a final grade, in the professional opinion of the teacher of record, of not less than a “B”. The determination of proficiency by a teacher must not require seat time as a condition or other element of determining proficiency.

The determination of proficiency for a pupil enrolled in a course shall be made no earlier than the deadline for submitting the final grade for the course. The determination of proficiency for a pupil not enrolled in a course shall be based on the pupil’s mastery of the underlying content of the course, demonstrated through completion of a final exam designed by the teacher of record for the applicable course with a minimum grade of a “B”.

Teachers of record have full professional discretion in determining proficiency of pupils in courses taught. Teachers of record are encouraged to integrate trial and error into the learning process and to incorporate continued opportunity for practice and revision of assignments until a pupil reaches a performance level that demonstrates to the teacher’s satisfaction that mastery of learning expectations has been attained.

The District may waive specific course requirements based on individual student needs and performance levels. Waiver requests shall also be considered with respect to age, maturity, interest, and aspirations of the students and shall be in consultation with the parents or guardians.

Legal Reference:	20-1-301, MCA	School fiscal year
	20-9-311(4)(a)(b)(d), MCA	Calculation of average number belonging (ANB) – 3-year averaging
	20-3-324, MCA	Powers and duties
	10.55.906 ARM	High School Credit
	Chapter 402 (2019)	Transformational Learning Incentives

Gallatin Gateway Elementary

Adopted on: 9/20/17

Reviewed on:

1006FE

FLEXIBILITY AND EFFICIENCY

Revised on: 3/11/20

Transfers for School Safety

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing the provision of law allowing transfers of funds to improve school safety and security.

The District may transfer state or local revenue from any budgeted or non-budgeted fund, other than the debt service fund or retirement fund, to its building reserve fund in an amount not to exceed the school district's estimated costs of improvements to school and student safety and security

The transfer of such funds can be for:

1. planning for improvements to and maintenance of school and student safety, including but not limited to the cost of services provided by architects, engineers, school resource officers, counselors, and other staff or consultants assisting with improvements to school and student safety and security;
2. programs to support school and student safety and security, including but not limited to active shooter training, threat assessments and restorative justice;
3. installing or updating locking mechanisms and ingress and egress systems at public school access points, including but not limited to systems for exterior egress doors and interior passageways and rooms, using contemporary technologies;
4. installing or updating bullet-resistant windows and barriers; and
5. installing or updating emergency response systems using contemporary technologies

Any transfers made under this policy and Montana law are not considered expenditures to be applied against budget authority. Any revenue transfers that are not encumbered for expenditures in compliance with the four reasons stated above, within 2 full school fiscal years after the funds are transferred, must be transferred back to the originating fund from which the revenue was transferred.

If transfers of funds are made from a District fund supported by a non-voted levy, the District may not increase its non-voted levy for the purpose of restoring the transferred funds.

Legal Reference:	20-9-503, MCA	Budgeting, tax levy, and use of building reserve fund.
	20-9-236, MCA	Transfer of funds – improvements to school safety and security

Recruitment and Retention

It is the policy of the District to utilize all resources available to meet the District’s objective of recruiting and retaining high quality staff focused on the individual success of each student. To meet this objective the District will utilize the flexible instructor licensure opportunities available to the District.

Flexible Instructor Licensing

It is the policy of the District to increase the flexibility and efficiency of the District’s resources by utilizing the provision of law allowing flexibility in licensure of instructors and as a means of addressing recruitment and retention of staff. Flexibilities in the following areas are available for the District’s enhancement of its programs and services with a focus on individual student success:

- Internships
 - Available to anyone with a current license and endorsement in one subject who wants to move to a new licensed role/endorsed area.
 - Requirements must be satisfied within 3 years
 - Must include a plan between the intern, the school district and an accredited preparation program
- Provisionally Certified
 - May be issued to an otherwise qualified applicant who can provide satisfactory evidence of:
 - The intent to qualify in the future for a class 1 or class 2 certificate and
 - Who has completed a 4-year college program or its equivalent, and
 - Holds a bachelor’s degree from a unit of the Montana university system or its equivalent.
- Substitutes
 - Must have a GED or high school diploma
 - Will have completed 3 hours of training by the district
 - Will have submitted a fingerprint background check
(All requirements can be waived by the district if the substitute has prior substitute teaching experience in another public school from November 2002 to earlier)
 - May not substitute more than 35 consecutive days for the same teacher, however the same substitute can be used for successive absences of different staff as long as each regular teacher for whom the substitute is covering is back by 35 consecutive teaching days
- Retired Educators

- School district must certify to OPI and TRS that the district has been unable to fill the position due to no qualified applications or no acceptance of offer by a non-retired teacher.
 - Limited to employment in a second or third class elementary district or a second or third class high school district.
 - Retired teacher must have 27 years of experience in TRS
 - There is a 3-year lifetime limit on the retired individual going to work under this provision.
- Class 3 Administrative License
 - Valid for a period of 5 years
 - Appropriate administrative areas include: elementary principal, secondary principal, K-12 principal, K-12 superintendent, and supervisor.
 - Must be eligible for an appropriately endorsed Class 1,2 or 5 license to teach in the school(s) in which the applicant would be an administrator or would supervise, and qualify as set forth in ARM 10.57414 through 10.57.418
 - An applicant for a Class 3 administrative license who completed an educator preparation program which does not meet the definition in ARM 10.57.102(2), who is currently licensed in another state at the same level of licensure, may be considered for licensure with verification of five years of successful administrative experience as defined in ARM 10.57.102 as documented by a recommendation from a state accredited P-12 school employer on a form prescribed by the Superintendent of Public Instruction and approved by the Board of Public Education. The requirements of ARM 10.57.414(1)(c)(i-iii) must be met by an applicant seeking a superintendent endorsement.
 - Class 4 for CTE
 - Valid for a period of 5 years
 - Renewable pursuant to the requirements of 10.57.215, ARM and the requirements specific to each type of Class 4 license.
 - 4A – for licensed teachers without a CTE endorsement
 - 4B – for individuals with at least a bachelor’s degree
 - 4C – for individuals with a minimum of a high school diploma or GED
 - Class 5 alternatives
 - Good for a maximum of 3 years
 - Requirements dependent upon the alternative the district is seeking
 - Emergency authorization of employment
 - Individual must have previously held a valid teacher or specialist certificate or have met requirements of rule 10.57.107, ARM
 - Emergency authorization is valid for one year, but can be renewed from year to year provided conditions of scarcity continue to persist

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4 Loan Repayment Program
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6 The District will assist any quality educator who meets the qualifications for the state’s loan
7 repayment program. Loan repayment assistance may be provided on behalf of a quality educator
8 who: (1) is employed newly hired in an identified impacted school described in a critical quality
9 educator shortage area as defined in 20-4-502; and (2) has an educational loan that is not in
10 default and that has a minimum unpaid current balance of at least \$1,000 at the time of
11 application.
12

13 A quality educator is eligible for state-funded loan repayment assistance for no more than 3 years
14 and an additional 1 year of loan repayment assistance voluntarily funded by the impacted school
15 or the district under which the impacted school is operated, with the maximum annual loan
16 repayment assistance not to exceed:

- 17 • \$3,000 of state-funded loan repayment assistance after the first complete year of teaching
18 in an impacted school;
- 19 • \$4,000 of state-funded loan repayment assistance after the second complete year of
20 teaching in the same impacted school or another impacted school within the same school
21 district;
- 22 • \$5,000 of state-funded loan repayment assistance after the third complete year of
23 teaching in the same impacted school or another impacted school within the same school
24 district; and
- 25 • up to \$5,000 of loan repayment assistance funded by the impacted school or the district
26 under which the impacted school is operated after the fourth complete year of teaching in
27 the same impacted school or another impacted school within the same school district.
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30 Legal References:	10.55.716, ARM	Substitute Teachers
	10.55.607, ARM	Internships
	10.57.107, ARM	Emergency Authorization of Employment
	10.57.215, ARM	Renewal Requirements
	10.57.420, ARM	Class 4 Career and Technical Education License
	10.57.424, ARM	Class 5 Provisional License
	19-20-732, MCA	Reemployment of certain retired teachers, specialists and administrators – procedure – definitions
	20-4-501-20-4-505	Loan Repayment Assistance for Quality Educator

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Gallatin Gateway Elementary

Adopted on: 9/20/17
Reviewed on:

1014FE

FLEXIBILITY AND EFFICIENCY

Revised on: 3/11/20

Intent to Increase Non-Voted Levy

The trustees shall adopt a resolution no later than March 31 whenever the trustees intend to impose an increase in a non-voted levy in the ensuing school fiscal year for the purposes of funding any of the funds listed below:

- a) Tuition fund under 20-5-324;
- b) Adult education fund under 20-7/705;
- c) Building reserve fund under 20-9-502 and 20-9-503;
- d) Transportation fund under 20-10-143 and 20-10-144;
- e) Bus depreciation reserve fund under 20-10-147; and
- f) Flexibility fund for purposes of transformational learning.

The trustees shall provide notice of intent to impose an increase in a non-voted levy for the ensuing school fiscal year by:

- a) Adopting a resolution of intent to impose an increase in a non-voted levy that includes, at a minimum, the estimated number of increased or decreased mills to be imposed and the estimated increased or decreased revenue to be raised compared to non-voted levies under a-e imposed in the current school fiscal year and, based on the district’s taxable valuation most recently certified by the department of revenue under 15-10-202, the estimated impacts of the increase or decrease on a home valued at \$100,000 and a home valued at \$200,000, and
- b) Publish a copy of the resolution in a newspaper that will give notice to the largest number of people of the district as determined by the trustees and posting a copy of the resolution to the school district’s website.

The resolution and publication of same must take place no later than March 31.

The Superintendent shall keep the trustees informed of any changes that may have occurred, which may have an effect on the estimated change in the mills and revenue, between the adoption of the resolution and the final adoption of the budget.

Legal Reference: 20-9-116, MCA Resolution of intent to increase nonvoted levy –
notice

 Chapter 402 (2019) Transformational Learning Incentives

Gallatin Gateway Elementary

Adopted on: 9/20/17
Reviewed on:

1014FE-F1

FLEXIBILITY AND EFFICIENCY

Revised on: 3/11/20

Notice of Intent to Impose an Increase in Levies Form

As an essential part of its budgeting process, the Gallatin Gateway Elementary Board of Trustees is authorized by law to impose levies to support its budget. The Gallatin Gateway Elementary Board of Trustees estimates the following increases/decreases in revenues and mills for the funds noted below for the next school fiscal year beginning July 1, _____, using certified taxable valuations from the current school fiscal year as provided to the district:

Fund Supported	Estimated Change in Revenues*	Estimated Change in Mills*	Estimated Impact, Home of \$100,000*	Estimated Impact, Home of \$200,000*
Adult Education	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Bus Depreciation	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Transportation	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Tuition	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Building Reserve	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Flexibility	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease
Total	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease	\$__ increase/decrease

***Impacts above are based on** current certified taxable valuations from the current school fiscal year

Regarding the increase in the building reserve levy referenced above, the following are school facility maintenance projects anticipated to be completed at this time:

1. _____
2. _____
3. _____
4. _____

Legal Reference: 20-9-116, MCA Resolution of intent to increase nonvoted levy - notice

Personalized Learning Opportunities

It is the policy of the District to create an environment and culture that supports and meets the individual needs, skills and interests of each student, provides advanced opportunities for students and supports transformational learning. As a result of the collective efforts of Trustees, Administrators, and Educators, the District ensures equality of educational opportunity for each student and have fully developed the potential of each student in District schools. In addition to other initiatives/strategies, the District is committed to the following:

1. Expanding the personalized learning opportunities for each student to accelerate in their career and college readiness, reduce the out-of-pocket costs for families and empower students to actively engage in forming successful post-secondary pathways by:
 - a. developing an advanced opportunity plan for students in grades 6-12 that
 - i. fosters individualized pathways for career and postsecondary educational opportunities and that honors individual interests, passions, strengths, needs, and culture and is supported through relationships among teachers, family, peers, the business community, postsecondary education officials, and other community stakeholders; and
 - ii. embeds community-based, experiential, online, and work-based learning opportunities and foster a learning environment that incorporates both face-to-face and virtual connections.
2. Supporting and embracing a culture of transformational learning by:
 - a. developing a transformational learning plan for each participating student that
 - i. honors individual interests, passions, strengths, needs, and culture, and that is rooted in relationships with teachers, family, peers, and community members;
 - ii. embeds community-based, experiential, online, and work-based learning opportunities and foster a learning environment that incorporates both face-to-face and virtual connections; and
 - iii. provide effective professional development to assist employees in transitioning to a transformational learning model.

Gallatin Gateway Elementary

Adopted on: 2/19/20

Reviewed on:

1016FE

FLEXIBILITY AND EFFICIENCY

Revised on:

Independent Investment Accounts

The Board may establish independent investment accounts separate and apart from those funds maintained by the county treasurer. The Board may transfer cash into an independent investment account from any budgeted or non-budgeted funds. A separate account shall be established for each fund from which transfers are made. The principal and any interest earned must be reallocated to the fund from which the deposit was originally made. Unless otherwise provided by law, all other revenue may be sent directly to a participating district’s investment account.

The District may either:

1. Establish and use the account as a non-spending account, returning sufficient funds to the county treasurer in time to pay all claims against the applicable fund; or
2. Establish a subsidiary checking account and make expenditures from the investment account, provided all transactions are accounted for and reported, as required by applicable accounting principles. If the District desires to establish a subsidiary checking account for purposes of paying for expenditures directly from an investment account, the District must enter into a written agreement with the county treasurer, in accordance with § 20-9-235, MCA.

Legal Reference: § 20-9-235, MCA Authorization for school district investment account

Gallatin Gateway Elementary

Adopted on: 6/26/17

Reviewed on:

Revised on:

1105 - R

BOARD OF TRUSTEES

Membership and Terms of Office

The District is governed by a Board of Trustees consisting of five (5) members. The powers and duties of the Board include the broad authority to adopt and enforce all policies necessary for the management, operations and governance of the District. Except as otherwise provided by law, trustees shall hold office for terms of three (3) years, or until their successors are elected and qualified. Terms of trustees shall be staggered as provided by law.

All trustees shall participate on an equal basis with other members in all business transactions pertaining to the elementary school maintained by the District.

Legal References:	§ 20-3-301, MCA	Election and term of office
	§ 20-3-302, MCA	Legislative intent to elect less than majority of trustees
	§ 20-3-305, MCA	Candidate qualification, filing deadline, and withdrawal
	§ 20-3-306, MCA	Conduct of election
	§ 20-3-307, MCA	Qualification and oath
	§ 20-3-341, MCA	Number of trustee positions in elementary districts – transition
	§ 20-3-361, MCA	Joint board of trustees organization and voting membership

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1110

BOARD OF TRUSTEES

Revised on: 6/26/17; 3/11/20

Taking Office

A newly elected trustee shall take office as soon as election results have been certified and the newly elected trustee has taken and subscribed to an oath to faithfully and impartially discharge the duties of the office to the best of his/her ability.

A newly appointed trustee shall take office, after the trustee has taken and subscribed to an oath to faithfully and impartially discharge the duties of the office to the best of his/her ability.

The person shall qualify by taking an oath of office administered by the county superintendent, the superintendent’s designee, or any officer provided for in 1-6-101, MCA or 2-16-116, MCA. Such oath must be filed with the county superintendent not more than twenty-five (25) days after the receipt of the certificate of election or the appointment.

Cross Reference: Policy 1113 Vacancies

Legal References:	§ 1-6-101, MCA	Officers who may administer oaths
	§ 2-16-116, MCA	Power to administer oaths
	§ 20-1-202, MCA	Oath of office
	§ 20-3-307, MCA	Qualification and oath

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1111

BOARD OF TRUSTEES

Revised on: 6/15/15, 6/26/17

Page 1 of 2

Elections

Elections conducted by the District are nonpartisan and are governed by applicable election laws as found in Titles 13 & 20 of the Montana Code Annotated. The ballot at such elections may include candidates for trustee positions, various public policy propositions, and advisor questions.

Board elections shall take place on the first (1st) Tuesday after the first (1st) Monday in May of each year. Any person who is a qualified voter of the District is legally qualified to become a trustee. A declaration of intent to be a candidate must be submitted to the District Clerk at least forty (40) days before the regular school election day. If different terms are to be filled, the term for the position for which the candidate is filing must also be indicated. Any person seeking to become a write-in candidate for a trustee position shall file a declaration of intent no later than 5:00 p.m. on the day before the ballot certification deadline in 20-20-401. If the number of candidates filing for vacant positions or filing a declaration of intent to be a write-in candidate is equal to or less than the number of positions to be elected, the trustees may give notice no later than thirty (30) days before the election that a trustee election will not take place. If a trustee election is not held, the trustees shall declare the candidates elected by acclamation and shall issue a "certificate of election" to each candidate.

A candidate intending to withdraw from the election shall send a statement of withdrawal to the clerk of the district containing all information necessary to identify the candidate and the office for which the candidate filed. The statement of withdrawal must be acknowledged by the clerk of the district. A candidate may not withdraw after 5:00 p.m. the day before the ballot certification deadline in 20-20-401.

In the event of an unforeseen emergency occurring on the date scheduled for the funding election, the district will be allowed to reschedule the election for a different day of the calendar year.

In years when the Legislature meets in regular session or in a special session that affects school funding, the trustees may order the election on a date other than the regular school election day in order for the electors to consider a proposition requesting additional funding under § 20-9-353, MCA.

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Legal Reference:	§ 13-10-211, MCA	Declaration of intent for write-in candidates
	§ 20-3-305, MCA	Candidate qualification, nomination and withdrawal
	§ 20-3-313, MCA	Election by acclamation – notice
	§ 20-3-322, MCA	Meetings and quorum
	§ 20-3-322(5), MCA	Meetings and quorum (unforeseen emergency definition)
	§ 20-3-324(4), MCA	Powers and duties
	§ 20-9-353, MCA	Additional financing for general fund – election for authorization to impose
	§ 20-20-105, MCA	Regular school election day and special school elections – limitation – exception
	§ 20-20-204, MCA	Election Notice
	§ 20-20-301, MCA	Qualifications of elector

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

Revised on: 6/26/17

1112

BOARD OF TRUSTEES

Resignation

The resignation of a trustee must be submitted in writing to the Clerk. A resignation is effective seventy-two (72) hours after its submission unless withdrawn during that period by the trustee through written notification of withdrawal made to the Clerk.

Trustees retiring from the Board may be recognized for their service to the District by presentation of a service plaque or other appropriate activities.

Legal Reference: § 2-16-502, MCA Resignations
 § 20-3-308, MCA Vacancy of trustee position

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

Revised on: 6/26/17

1113

BOARD OF TRUSTEES

Vacancies

A trustee position becomes vacant before the expiration of a term, when any of the following occurs:

- 1. Death of the trustee;
- 2. Resignation, in writing, filed with the Clerk;
- 3. Trustee moves out of the nominating district, establishing residence elsewhere;
- 4. Trustee is no longer a registered elector of the District under the provisions of § 20-20-301, MCA;
- 5. Trustee is absent from the District for sixty (60) consecutive days;
- 6. Trustee fails to attend three (3) consecutive meetings of the trustees without good excuse;
- 7. Trustee has been removed under the provisions of § 20-3-310, MCA; or
- 8. Trustee ceases to have the capacity to hold office under any other provision of law.
- 9. A trustee position also shall be vacant when an elected candidate fails to qualify.

When a trustee vacancy occurs, the remaining trustees shall declare such position vacant and fill such vacancy by appointment. The Board will receive applications from any qualified persons seeking to fill the position after suitable public notice. The Board will appoint one (1) candidate to fill the position.

Should the Board fail to fill a vacancy within sixty (60) days from the creation of a vacancy, the county superintendent shall appoint, in writing, a competent person to fill such vacancy. An appointee shall qualify by completing and filing an oath of office with the county superintendent within fifteen (15) days after receiving notice of the appointment and shall serve until the next regularly scheduled school election and a successor has qualified.

Cross Reference: 1240 Duties of Individual Trustees
1112 Resignations

Legal References: § 20-3-308, MCA Vacancy of trustee position
§ 20-3-309, MCA Filling vacated trustee position – appointee qualification and term of office

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1120

BOARD OF TRUSTEES

Revised on: 08/19/13, 6/26/17; 3/11/20

Annual Organization Meeting

After issuance of election certificates to newly elected trustees, but no later than twenty-five (25) days after the election, the Board shall elect from among its members a Chairperson and a Vice Chairperson to serve until the next annual organizational meeting. If a Board member is unable to continue to serve as an officer, a replacement shall be elected at the earliest opportunity to serve the remainder of the term. In the absence of both the Chairperson and the Vice Chairperson, the Board shall elect a Chairperson *pro tempore*, who shall perform the functions of the Chairperson during the latter’s absence. The Clerk shall act as Board secretary.

The normal order of business shall be modified for the annual organizational meeting by considering the following matters after the approval of the minutes of the previous meeting:

1. Welcome and introduction of newly elected Board members by the current Chairperson
2. Swearing in of newly elected trustees
3. Call for nominations for Chairperson to serve during the ensuing year
4. Election of a Chairperson
5. Assumption of office by the new Chairperson
6. Call for nominations for Vice Chairperson to serve during the ensuing year
7. Election of a Vice Chairperson
8. Appointment of a Clerk

Legal References:	§ 20-3-321, MCA	Organization and officers
	§ 20-3-322(a), MCA	Meetings and quorum
	Title 1, Chapter 5, Part 6, MCA	Notarial Acts

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1130

BOARD OF TRUSTEES

Revised on: 02/17/14, 6/26/17

Committees

Generally, trustees will function as a whole and will not form committees of the Board. Nevertheless, the Board may create Board committees as deemed necessary or useful. All committees created by the Board shall comply with the open meeting laws and all other laws applicable to school board meetings.

Committees of the Board may be created and their purposes defined by a majority of the Board. The Board Chairperson shall appoint trustees to serve on such committees. Trustees serving on committees shall be limited to fewer than a majority of the Board.

Citizen Committees

The Board or the Superintendent may create committees that involve community members as deemed necessary, either on an ad hoc or regular basis. The Board Chair or Superintendent will make all appointments to citizen committees and will establish the parameters and duties for the citizen committees. Notice of citizen committee meetings shall be given in the same manner as notice for special meetings, and citizen committee meetings shall be open to the public.

Legal Reference: § 2-3-203, MCA Meetings of public agencies and certain associations of public agencies to be open to public – exceptions
Bryan v. Yellowstone (2002), 2002 MT 264
Crofts v. Associated Press (2004), 2004 MT 120

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Gallatin Gateway Elementary

Adopted on: 08/20/12
Reviewed on:

1210 BOARD OF TRUSTEES Revised on: 06/15/15, 6/26/17, 10/18/21

Qualifications, Terms, and Duties of Board Officers

The Board officers are the Chairperson and Vice Chairperson. These officers are elected at the annual organizational meeting.

Chairperson

The Chairperson may be any trustee of the board. The duties of the Chairperson include the following:

- Preside at all meetings and conduct meetings in the manner prescribed by the Board’s policies;
- Make all Board committee appointments;
- Sign all papers and documents as required by law and as authorized by action of the Board;
- Close Board meetings as authorized by Montana law; and
- Act as spokesperson for the Board.

The Chairperson is permitted to participate in all Board meetings in a manner equal to all other Board members, including the right to participate in debate and to vote. The Chairperson may make a motion, and may second motions.

Vice Chairperson

The Vice Chairperson shall preside at all Board meetings in the absence of the Chairperson and shall perform all the duties of the Chairperson during the Chairperson’s absence or unavailability. The Vice Chairperson shall work closely with the Chairperson and shall assume whatever duties the Chairperson may delegate.

Cross Reference:	Policy 1120	Annual Organizational Meeting
Legal References:	§ 2-3-203, MCA	Meetings of public agencies and certain associations of public agencies to be open to public – exceptions
	§ 20-3-321(2), MCA	Organization and officers
	§ 20-3-351(1)(a), MCA	Number of trustee positions in high school districts
	§ 20-3-352(2), MCA	Request and determination of number of high school district additional trustee positions – nonvoting trustee

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

Revised on: 6/26/17

1230

BOARD OF TRUSTEES

Clerk

The Clerk of the Board shall attend all meetings of the Board, unless excused by the Chairperson, and shall keep an accurate and permanent record of all proceedings. The Clerk shall have custody of the records, books, and documents of the Board. In the absence or inability of the Clerk to attend a Board meeting, the trustees will have one (1) of their members or a District employee act as clerk for the meeting, and said person will supply the Clerk with a certified copy of the proceedings.

The Clerk & Business Manager will keep accurate and detailed accounts of all receipts and disbursements made by the District. The Clerk shall draw and countersign all warrants for expenditures that have been approved by the Board.

The Clerk will make the preparations legally required for the notice and conduct of all District elections.

The Clerk & Business Manager shall prepare and submit to the Board a financial report of receipts and disbursements of all school funds on an annual basis, unless the Board requests such reports on a more frequent basis. The Clerk shall perform all functions pertaining to the preparation of school elections. The Clerk shall perform other duties as prescribed by state law or as directed by the Board and the Superintendent.

Legal references:	§ 20-3-321, MCA	Organization and officers
	§ 20-3-325, MCA	Clerk of district
	§ 20-4-201, MCA	Employment of teachers and specialists by contract
	§ 20-9-133, MCA	Adoption and expenditure limitations of final budget
	§ 20-9-165, MCA	Budget amendment limitation, preparation, and adoption procedures
	§ 20-9-221, MCA	Procedure for issuance of warrants
	§ 20-20-401(2), MCA	Trustees' election duties – ballot certification

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1240 - R

BOARD OF TRUSTEES

Revised on: 06/15/15, 6/26/17

Duties of Individual Trustees

The authority of individual trustees is limited to participating in actions taken by the Board as a whole when legally in session. Trustees shall not assume responsibilities of administrators or other staff members. The Board or staff shall not be bound by an action taken or statement made by an individual trustee, except when such statement or action is pursuant to specific instructions and official action taken by the Board.

Each trustee shall review the agenda and attendant materials in advance of a meeting and shall be prepared to participate in discussion and decision making for each agenda item. Each trustee shall visit every school (except in 1st class districts) at least once per year to examine its management, conditions, and needs.

All trustees are obligated to attend Board meetings regularly. Whenever possible, a trustee shall give advance notice to the Chairperson or Superintendent, of the trustee’s inability to attend a Board meeting. A majority of the Board may excuse a trustee’s absence from a meeting if requested to do so.

Board members, as individuals, have no authority over school affairs, except as provided by law or as authorized by the Board.

Cross Reference: 1113 Vacancies

Legal References:	§ 20-3-301, MCA	Election and term of office
	§ 20-3-308, MCA	Vacancy of trustee position
	§ 20-3-324(22), MCA	Powers and duties
	§ 20-3-332, MCA	Personal immunity and liability of trustees

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1310 - R

BOARD OF TRUSTEES

Revised on: 6/26/17, 5/19/21

District Policy and Procedures

The policies contained in this manual are adopted, implemented, and enforced in accordance with the supervisory authority vested with the Board of Trustees in accordance with Article X, section 8 of the Montana Constitution and related statues, regulations and court decisions.

Adoption and Amendment of Policies

Proposed new policies and proposed changes to existing policies shall be presented in writing for reading and discussion at a regular or special Board meeting. Interested parties may submit views, present data or arguments, orally or in writing, in support of or in opposition to proposed policy. Any written statement by a person, relative to a proposed policy or amendment, should be directed to the District Clerk prior to the final reading. The final vote for adoption shall take place not earlier than at the second (2nd) reading of the particular policy. New or revised policies that are required, or have required language changes based on State or Federal law, or are required changes by administrative rule, may be adopted after the first (1st) reading if sufficient notice has been given through the board agenda.

All new or amended policies shall become effective on adoption; unless a specific effective date is stated in the motion for adoption. Policies, as adopted or amended, shall be made a part of the minutes of the meeting at which action was taken and also shall be included in the District’s policy manual. Policies of the District shall be reviewed on a regular basis.

Policy Manuals

The Superintendent shall develop and maintain a current policy manual which includes all policies of the District. Every administrator, as well as staff, students, and other residents, shall have ready access to District policies.

Suspension of Policies

Under circumstances that require waiver of a policy, the policy may be suspended by a majority vote of the trustees present. To suspend a policy, however, all trustees must have received written notice of the meeting, which includes the proposal to suspend a policy and an explanation of the purpose of such proposed suspension.

Administrative Procedures

The Superintendent shall develop such administrative procedures as are necessary to ensure consistent implementation of policies adopted by the Board.

When a written procedure is developed, the Superintendent shall submit it to the Board as an information item.

Legal References:	Article X, Section 8	Montana Constitution
	§ 20-3-323, MCA	District policy and record of acts
	10.55.701, ARM	Board of Trustees

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1400 - R

BOARD OF TRUSTEES

Revised on: 08/19/13, 6/26/17,

7/17/2017

Board Meetings

Meetings of the Board must occur at a duly called and legally conducted meeting. "Meeting" is defined as the convening of a quorum of the constituent membership of the Board, whether in person or by means of electronic equipment, to hear, discuss, or act upon a matter over which the Board has supervision, control, jurisdiction, or advisory power.

Regular Meetings

Unless otherwise specified, all meetings will take place in the Gallatin Gateway multipurpose room. Regular meetings shall take place at 6:00 p.m. on the third (3rd) Wednesday of each month, or at other times and places determined by a majority vote. Except for an unforeseen emergency, meetings must be held in school buildings or, upon the unanimous vote of the trustees, in a publicly accessible building located within the District. If regular meetings are scheduled at places other than as stated above or are adjourned to times other than the regular meeting time, notice of the meeting shall be made in the same manner as provided for special meetings. The trustees may meet outside the boundaries of the District for collaboration or cooperation on educational issues with other school boards, educational agencies, or cooperatives. Adequate notice of the meeting, as well as an agenda, must be provided to the public in advance. Decision making may only occur at a properly noticed meeting held within the District's boundaries. When a meeting date falls on a school holiday, the meeting may take place the next business day.

Emergency Meetings

In the event of an emergency involving possible personal injury or property damage, the Board may meet immediately and take official action without prior notification.

Budget Meetings

Between July 1 and August 10 of each year, the Clerk shall publish a notice stating the date, time, and place trustees will meet for the purpose of considering and adopting a final budget for the District, stating that the meeting of the trustees may be continued from day to day until final adoption of a District budget and that any taxpayer in the District may appear at the meeting and be heard for or against any part of the budget. This notice shall be published in the *Bozeman Daily Chronicle*.

On the date and at the time and place stated in the published notice (on or before August 20), trustees shall meet to consider all budget information and any attachments required by law. The

meeting may continue from day to day; however, the Board must adopt a final budget not later than August 25.

Special Meetings

Special meetings may be called by the Chairperson or by any two (2) trustees. A written notice of a special meeting, stating the purpose of the meeting, shall be delivered to every trustee not less than forty-eight (48) hours before the time of the meeting, except that the forty-eight-(48)-hour notice is waived in an unforeseen emergency as stated in § 20-3-322(5), MCA. Such written notice shall be posted conspicuously within the District in a manner that will receive public attention. Written notice also shall be sent not less than twenty-four (24) hours prior to the meeting, to each newspaper and radio or television station that has filed a written request for such notices. Business transacted at a special meeting will be limited to that stated in the notice of the meeting.

Closed Sessions

Under Montana law, the Board may meet in closed sessions to consider matters of individual privacy. Before closing a meeting, the presiding officer must determine that the demands of individual privacy exceed the merits of public disclosure and so state publicly before going into closed session. The Board also may go into closed session to discuss a strategy to be followed with respect to litigation, when an open meeting would have a detrimental effect on the litigating position of the District. This exception does not apply if the litigation involves only public bodies or associations as parties. Before closing a meeting for litigation purposes, the District may wish to consult legal counsel on the appropriateness of this action. No formal action shall take place during any closed session.

Legal References:	§ 2-3-103, MCA	Public participation – governor to ensure guidelines adopted
	§ 2-3-104, MCA	Requirements for compliance with notice provisions
	§ 2-3-105, MCA	Supplemental notice by radio or television
	§ 2-3-201, MCA	Legislative intent – liberal construction
	§ 2-3-202, MCA	Meeting defined
	§ 2-3-203, MCA	Meetings of public agencies and certain associations of public agencies to be open to public – exceptions
	§ 20-3-322, MCA	Meeting and quorum
	§ 20-9-115, MCA	Notice of final budget meeting
	§ 20-9-131, MCA	Final budget meeting
	10.55.701, ARM	Board of Trustees

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3 Gallatin Gateway Elementary
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Adopted on: 08/20/12
Reviewed on:

7 1401

BOARD OF TRUSTEES

Revised on: 6/26/17, 6/27/2018

8
9 Records Available to Public

10
11 All District records, except those restricted by state and federal law, shall be available to citizens for
12 inspection at the Clerk's office.

13
14 Any individual may request public information from the district. The district shall make the means of
15 requesting public information accessible to all persons.

16
17 Upon receiving a request for public information, the district shall respond in a timely manner to the
18 requesting person by:

- 19
20 (a) Making the public information available for inspection and copying by the requesting person; or
21 (b) Providing the requesting person with an estimate of the time it will take to fulfill the request if the
22 public information cannot be readily identified and gathered and any fees that maybe charged.

23
24 The district may charge a fee for fulfilling a public information request. The fee may not exceed the
25 actual costs directly incident to fulfilling the request in the most cost-efficient and timely manner
26 possible. The fee must be documented. The fee may include the time required to gather public
27 information. The district may require the requesting person to pay the estimated fee prior to identifying
28 and gathering the requested public information.

29
30 The district is not required to alter or customize public information to provide it in a form specified to
31 meet the needs of the requesting person. If the district agrees to a request to customize a records request
32 response, the cost of the customization may be included in the fees charged by the district.

33
34 In accordance with § 20-9-213(1), MCA, the record of the accounting of school funds shall be open to
35 public inspection at any meeting of the trustees. A fee may be charged for any copies requested. Copies
36 will be available within a reasonable amount of time following a request.

37
38 A written copy of Board minutes shall be available to the general public within five (5) working days
39 following approval of the minutes by the Board. If requested, one (1) free copy of minutes shall be
40 provided to local media within five (5) working days following approval by the Board.

41
42 Legal References: § 2-6-1003, MCA Access to Public Information
43 § 2-6-1006, MCA Public Information requests - fees
44 § 20-3-323, MCA District policy and record of acts
45 § 20-9-213, MCA Duties of trustees
46
47

School Board Use of Email and Mobile Messaging

Use of email and mobile messaging by members of the Board will conform to the same standards of judgment, propriety, and ethics as other forms of school board-related communication. Board members will comply with the following guidelines when using e-mail and mobile messaging in the conduct of Board responsibilities:

1. The Board will not use e-mail or mobile messaging as a substitute for deliberations at Board meetings or for other communications or business properly confined to Board meetings.
2. Board members will be aware that mobile messages, e-mail and e-mail attachments received or prepared for use in Board business or containing information relating to Board business may be regarded as public records, which may be inspected by any person upon request, unless otherwise made confidential by law.
3. Board members will avoid reference to confidential information about employees, students, or other matters in e-mail and mobile communications, because of the risk of improper disclosure. Board members will comply with the same standards as school employees, with regard to confidential information.

Cross Reference: 1400 Board Meetings
 1401 Records Available to Public

Legal Reference: § 2-3-103, MCA Public participation – governor to ensure guidelines adopted
 § 2-3-201, MCA Legislative intent – liberal construction
 § 2-3-203, MCA Meetings of public agencies and certain associations of public agencies to be open to public – exceptions
 § 20-3-322, MCA Meeting and quorum

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1420 - R

BOARD OF TRUSTEES

Revised on: 08/19/13, 10/21/13,
06/15/15, 6/26/17, 6/27/2018; 3/11/20, 10/18/21

page 1 of 3

School Board Meeting Procedure

Agenda

The authority to set the board agenda lies with the Board Chair in consultation with board members and the administration. The act of preparing the board meeting agendas can be delegated to the Superintendent.

Any topics requested by Board members or members of the public must first be approved by the Board Chair before being placed on the agenda. Citizens wishing to make brief comments about school programs or procedures will follow the public comment procedures in district policy.

The agenda also must include a “public comment” portion to allow members of the general public to comment on any public matter under the jurisdiction of the District which is not specifically listed on the agenda, except that no member of the public will be allowed to comment on contested cases, other adjudicative proceedings, or personnel matters. The Board Chairperson may place reasonable time limits on any “public comment” period to maintain and ensure effective and efficient operations of the Board. The Board shall not take any action on any matter discussed, unless the matter is specifically noticed on the agenda, and the public has been allowed opportunity to comment.

Copies of the agenda for the current Board meeting, minutes of the previous Board meeting, and relevant supplementary information will be prepared and distributed to each trustee at least forty-eight (48) hours in advance of a Board meeting and will be available to any interested citizen at the Superintendent’s office forty-eight (48) hours before a Board meeting. An agenda for other types of Board meetings will be prepared if circumstances require an agenda.

Consent Agenda

To expedite business at its meetings, the Board approves the use of a consent agenda, which includes those items considered to be routine in nature. Any item that appears on the consent agenda may be removed by a member of the Board. Any Board member who wishes to remove an item from the consent agenda must give advance notice in a timely manner to the Superintendent. Remaining items will be voted on by a single motion. The approved motion will be recorded in the minutes, including a listing of all items appearing on the consent agenda.

Minutes

Appropriate minutes of all meetings required to be open must be kept and must be available for inspection by the public. [(Optional) If an audio recording of a meeting is made and designated as

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4 official, the recording constitutes the office record of the meeting. If an official recording is made, a
5 written record of the meeting must also be made and must also include:
6

- 7 • Date, time, and place of the meeting;
 - 8 • Presiding officer;
 - 9 • Board members recorded as absent or present;
 - 10 • Summary of discussion on all matters discussed (including those matters discussed during the
11 “public comment” section), proposed, deliberated, or decided, and a record of any votes
12 taken;
 - 13 • Detailed statement of all expenditures;
 - 14 • Purpose of recessing to closed session; and
 - 15 • Time of adjournment.
- 16

17 If the minutes are recorded and designated as the official record, a log or time stamp for each main
18 agenda item is required for the purpose of providing assistance to the public in accessing that portion
19 of the meeting.
20

21 Unofficial minutes shall be delivered to Board members in advance of the next regularly scheduled
22 meeting of the Board. Minutes need not be read publicly, provided that Board members have had an
23 opportunity to review them before adoption. A file of permanent minutes of Board meetings shall be
24 maintained in the office of the Clerk, to be made available for inspection upon request. A written
25 copy shall be made available within five (5) working days following approval by the Board.
26

27 Quorum

28

29 No business shall be transacted at any meeting of the Board unless a quorum of its members is
30 present. A majority of the full membership of the Board shall constitute a quorum, whether the
31 individuals are present physically or electronically. A majority of the quorum may pass a resolution,
32 except as provided in § 20-4-203(1), MCA, and § 20-4-401(4), MCA.
33

34 Electronic Participation

35

36 The Board may allow members to participate in meetings by telephone or other electronic means.
37 Board members may not simply vote electronically but must be connected with the meeting
38 throughout the discussion of business. If a Board member electronically joins the meeting after an
39 item of business has been opened, the remotely located member shall not participate until the next
40 item of business is opened.
41

42 If the Board allows a member to participate electronically, the member will be considered present
43 and will have his or her actual physical presence excused. The member shall be counted present for
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4 purposes of convening a quorum. The Clerk will document it in the minutes, when members
5 participate in the meeting electronically.
6

7 Any Board member wishing to participate in a meeting electronically will notify the Chairperson and
8 Superintendent as early as possible. The Superintendent will arrange for the meeting to take place in
9 a location with the appropriate equipment so that Board members participating in the meeting
10 electronically may interact, and the public may observe or hear the comments made. The
11 Superintendent will take measures to verify the identity of any remotely located participants.
12

13 Meeting Conduct and Order of Business
14

15 General rules of parliamentary procedure are used for every Board meeting. *Robert's Rules of Order*
16 may be used as a guide at any meeting. The order of business shall be reflected on the agenda. The
17 use of proxy votes shall not be permitted. Voting rights are reserved to those trustees in attendance.
18 Voting shall be by acclamation or show of hands.
19

20 Rescind a Motion
21

22 A motion to rescind (cancel previous action) may be made anytime by any trustee. A motion to
23 rescind must be properly noticed on the Board's agenda for the meeting. It is in order any time prior
24 to accomplishment of the underlying action addressed by the motion.
25

26 Cross Reference: 1441 Audience Participation
27

28 Legal References: § 2-3-103, MCA Public participation - governor to ensure guidelines
29 adopted
30 § 2-3-202, MCA Meeting defined
31 § 2-3-212, MCA Minutes of meetings – public inspection
32 § 20-1-212, MCA Destruction of records by school officer
33 § 20-3-322, MCA Meetings and quorum
34 § 20-3-323, MCA District policy and record of acts
35 *Jones and Nash v. Missoula Co., 2006 MT2, 330 Mont 2005*
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Gallatin Gateway Elementary

Adopted on: 2/19/20

Reviewed on:

Revised on:

1420F

BOARD OF TRUSTEES

Notice Regarding Public Comment

Montana law requires school districts and other public agencies to include on the agenda for public meetings an item allowing public comment on any public matter not otherwise specifically listed on the agenda that is within the jurisdiction of the agency. The public comment portion of the agenda is not the time designated to hear items that are specifically listed/identified on the agenda.

For those individuals who desire to address the Board during the public comment portion of the meeting, if you haven't already done so, please sign your name to the sheet and indicate the general topic on which you will be commenting. The Board Chairperson will call individuals to speak in the order listed on the sheet provided. Please state your name prior to beginning your comment. There will be an opportunity for citizens who have not signed in to comment at the conclusion of the comment period. The Board would like to remind everyone in attendance to avoid violations of individual rights of privacy when providing comment. The Board is not authorized to hear comments on contested cases or other adjudicative proceedings.

By law, the District cannot take any action on any matter discussed during the public comment portion of the meeting as those matters are not specifically noticed on the agenda. The Board may take a matter raised during the public comment period under consideration for inclusion on a future agenda.

In accordance with Montana law, citizens have the right to comment on an item that is specifically listed on the agenda. Citizens will be permitted to do so when the item comes up for discussion and action. The board chair will indicate when the public has the opportunity to comment prior to board action on a particular agenda item.

The Board Chair has the authority to manage all public comment periods and will do so in accordance with state law and district policy.

Gallatin Gateway Elementary

Adopted on:

Reviewed on:

1425

BOARD OF TRUSTEES

Revised on: 6/26/17

Abstentions From Voting

Section 20-3-323(2), MCA, requires the minutes of each Board meeting to include the voting records of each trustee present. As a general rule trustees should vote on all issues, unless casting a vote would be a violation of law. Under Montana law, instances in which it would be unlawful or inappropriate for a trustee to cast a vote on a particular issue include but are not necessarily limited to the following:

3. When hiring a relative of a trustee;
4. When casting a vote would directly or substantially affect, to its economic benefit, a business or other undertaking in which the trustee either has a substantial financial interest or in which the trustee is engaged as counsel, consultant, representative, or agent;
5. When casting a vote would directly and substantially affect a business or other undertaking to its economic detriment, where a trustee has a substantial personal interest in a competing firm or undertaking;
6. When casting a vote would cause a trustee to have a pecuniary interest, either directly or indirectly, in a contract made by the trustee (while acting in the trustee’s official capacity) or by the Board, and;
7. When casting a vote would put the trustee in the position of an agent or solicitor in the sale or supply of goods or services to the District.
8. When hiring the relative of a trustee;
9. When casting a vote would directly and substantially affect, to its economic benefit, a business or other undertaking in which the trustee either has a substantial financial interest or in which the trustee is engaged as counsel, consultant, representative, or agent;
10. When casting a vote would directly and substantially affect a business or other undertaking to its economic detriment, where a trustee has a substantial personal interest in a competing firm or undertaking;
11. When casting a vote would cause a trustee to have a pecuniary interest, either directly or indirectly, in a contract made by the trustee (while acting in the trustee’s official capacity) or by the Board; and
12. When casting a vote would put the trustee in the position of an agent or solicitor in the sale or supply of goods or services to the District.

In addition, a trustee shall be allowed to abstain from voting to avoid the appearance of impropriety or the appearance of a perceived conflict. If a trustee abstains from voting, the abstention should be recorded in the minutes and may include an explanation of the reasons for the abstention. The Board discourages abstentions, unless the reasons are substantiated as provided herein.

1	Legal References:	§ 2-2-105, MCA	Ethical requirements for public officers and public
2			employees
3		§ 2-2-121, MCA	Rules of conduct for public officers and public
4			employees
5		§ 2-2-302, MCA	Appointment of relative to office of trust or emolument
6			unlawful – exceptions – publication of notice
7		§ 20-1-201, MCA	School officers not to act as agents
8		§ 20-3-323, MCA	District policy and record of acts
9		§ 20-9-204, MCA	Conflicts of interests, letting contracts, and calling for
10			bids
11			
12			

Gallatin Gateway Elementary

Adopted on:
Reviewed on: 6/26/17
Revised on: 3/11/20

1441 - R

BOARD OF TRUSTEES

Audience Participation

The Board recognizes the value of public comment on educational issues and the importance of involving members of the public in its meetings. The Board also recognizes the statutory and constitutional rights of the public to participate in governmental operations. To allow fair and orderly expression of public comments, the Board will permit public participation through oral or written comments during the “public comment” section of the Board agenda and prior to a final decision on a matter of significant interest to the public. The Chairperson may control such comment to ensure an orderly progression of the meeting in the manner described in Policy 1420F.

Cross Reference: 1420 School Board Meeting Procedure

Legal Reference: Article II, Section 8, Montana Constitution – Right of participation
Article II, Section 10, Montana Constitution – Right of privacy
Chapter 2, Part 1, MCA Notice and Opportunity to Be Heard

1 Gallatin Gateway Elementary

2
3 Adopted on: 08/20/2012

4 Reviewed on: 6/26/17

5 1510

6 BOARD OF TRUSTEES

7 Revised on: 07/08/13

8
9 Goals and Objectives

10 The Board shall annually review and/or adopt long and short-range goals and objectives to guide
11 the District in the areas identified by the Board for school improvement. The Board may seek
12 input from community members, parents, students, staff members and other interested
13 individuals in developing these goals and objectives.

14 Vision: Gallatin Gateway School provides a premiere educational program for our students.

15
16 Mission: The Gallatin Gateway School community empowers our students to take responsibility
17 for their learning so they may achieve their individual potentials as lifelong learners and
18 productive citizens.

19
20 Motto: Educating the Future

21
22 Philosophy: The Trustees of School District #35 are guided by the conviction that every student
23 has the right to the best education this community can provide. Responsibility for this rests with
24 all citizens, parents, school staff, and students, with the ultimate responsibility for direction and
25 decision-making being assumed by the Board of Trustees.

26
27 The Board will exert leadership in creating, maintaining, and improving the school for the
28 children’s educational needs. The focal point of concern in our school system is the student.
29 Organization, staffing, programming, teaching, and funding will be developed to enhance
30 positive opportunities for students to learn and develop personally, academically, and socially.

31
32 NOTE: Reference to “parents’ in board policy shall mean parent, caretaker relative, legal
33 guardian, or legal custodian.

Gallatin Gateway Elementary

Adopted on: 6/26/17

Reviewed on:

Revised on:

1511

BOARD OF TRUSTEES

Code of Ethics for School Board Members

AS A MEMBER OF MY LOCAL BOARD OF TRUSTEES, I WILL STRIVE TO IMPROVE PUBLIC EDUCATION, AND TO THAT END I WILL:

Attend all regularly scheduled Board meetings insofar as possible and become informed concerning the issues to be considered at those meetings;

Recognize that I should endeavor to make policy decisions only after full discussion at public Board meetings;

Make all decisions based on available facts and my independent judgment and refuse to surrender that judgment to individuals or special interest groups;

Encourage the free expression of opinion by all Board members and seek systematic communications between the Board and students, staff, and all elements of the community;

Work with other Board members to establish effective Board policies and to delegate authority for administration to the Superintendent;

Recognize and respect the responsibilities that properly are delegated to the Superintendent;

Communicate to the Superintendent expression of public reaction to Board policies, school programs, or staff;

Inform myself about current educational issues, by individual study and through participation in programs providing needed information, such as those sponsored by the Montana and National School Boards Associations;

Support the employment of those persons best qualified to serve as school staff and insist on regular and impartial evaluation of staff;

Avoid being placed in a position of conflict of interest and refrain from using my Board position for personal or partisan gain;

Avoid compromising the Board or administration by inappropriate individual action or comments and respect the confidentiality of information that is privileged under applicable law;

Remember always that my first and greatest concern must be the educational welfare of students attending public schools.

Gallatin Gateway Elementary

Reviewed on:

1512

BOARD OF TRUSTEES

Revised on: 06/15/15, 6/26/17; 3/11/20

page 1 of 2

Conflict of Interest

A trustee may not:

1. Engage in a substantial financial transaction for the trustee’s private business purpose, with a person whom the trustee inspects or supervises in the course of official duties.
2. Perform an official act directly and substantially affecting, to its economic benefit, a business or other undertaking in which the trustee either has a substantial financial interest or is engaged as counsel, consultant, representative, or agent.
3. Act as an agent or solicitor in the sale or supply of goods or services to a district.
4. Have a pecuniary interest, directly or indirectly, in any contract made by the Board, when the trustee has more than a ten percent (10%) interest in the corporation. A contract does not include: 1) merchandise sold to the highest bidder at public auctions; 2) investments or deposits in financial institutions that are in the business of loaning or receiving money, when such investments or deposits are made on a rotating or ratable basis among financial institutions in the community or when there is only one (1) financial institution in the community; or 3) contracts for professional services other than salaried services or for maintenance or repair services or supplies when the services or supplies are not reasonably available from other sources, if the interest of any Board member and a determination of such lack of availability are entered in the minutes of the Board meeting at which the contract is considered.
5. Be employed in any capacity by the District, with the exception of officiating at athletic competitions under the auspices of the Montana Officials Association.
6. Perform an official act directly and substantially affecting a business or other undertaking to its economic detriment when the officer or employee has a substantial personal interest in a competing firm or undertaking.
7. Appoint or renew to a position of trust or emolument any person related or connected by consanguinity within the fourth (4th) degree or by affinity within the second (2nd) degree.
 - a. This prohibition does not apply to the issuance of an employment contract to a person as a substitute teacher who is not employed as a substitute teacher for more than thirty (30) consecutive school days.
 - b. This prohibition does not apply to the renewal of an employment contract of a tenured teacher or classified employee employed without a written contract for a

specific term related to a Board member, who was initially hired before the Board member assumed the trustee position.

- c. This prohibition does not apply if trustees comply with the following requirements: 1) **All trustees**, except the trustee related to the person to be employed or appointed, vote to employ the related person; 2) the trustee related to the person to be employed abstains from voting; and 3) the trustees give fifteen (15) days written notice of the time and place of their intended action in a newspaper of general circulation in the county where the school is located.

Legal Reference: Section 20-9-204, MCA – Conflicts of Interest
 Section 20-1-201, MCA – School Officials not to Act as Agents
 Section 2-3-302, MCA - Nepotism
 Section 2-2-103, MCA – Public Trust
 Section 2-2-104, MCA – Rules of Conduct
 Section 2-2-105, MCA – Ethical Requirements
 Section 2-2-121, MCA – Rules of Conduct

Gallatin Gateway Elementary

Reviewed on:

1512F

BOARD OF TRUSTEES Revised on: 06/15/15, 6/26/17; 3/11/20

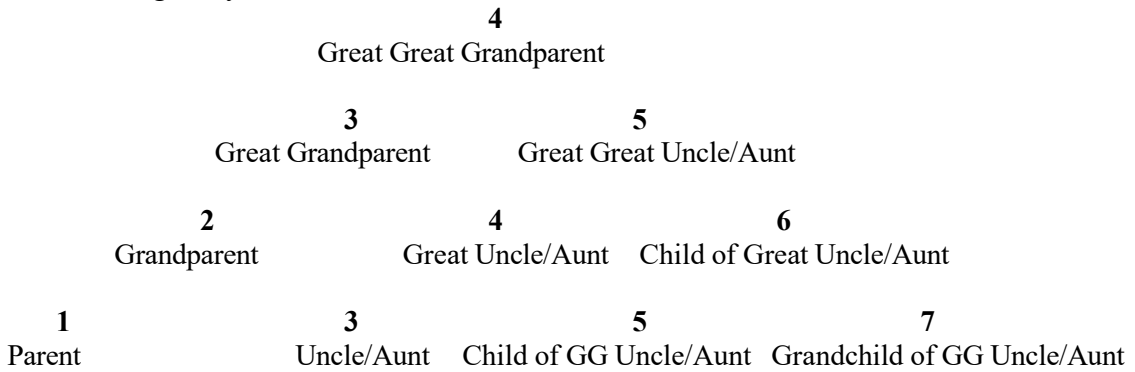
Relationships Defined and Chart

Definitions

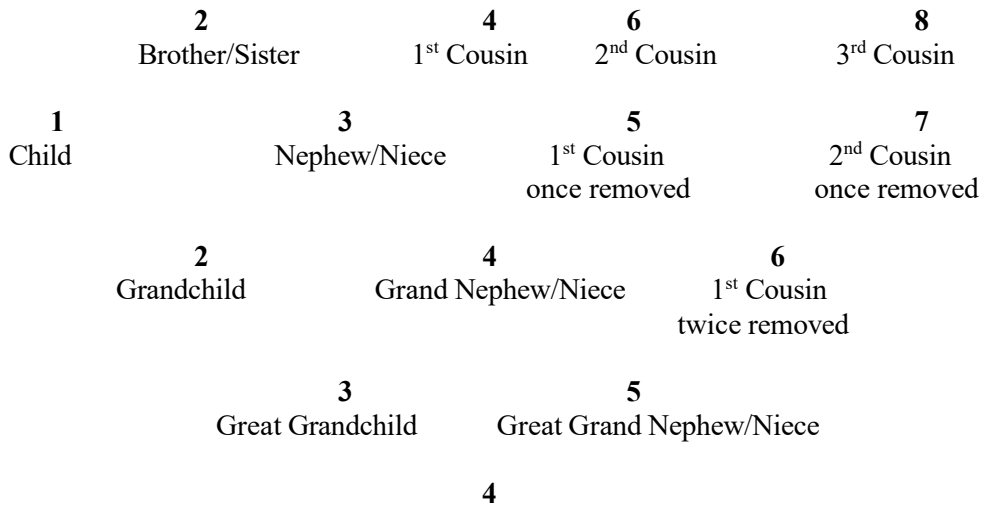
Affinity is the legal relationship arising as the result of marriage. Relationship by affinity terminates upon the death of one of the spouses or other dissolution of marriage, except when the marriage has resulted in issue still living.

Consanguinity is a relationship by blood relation. Relationship by consanguinity is confirmed by being descended from the same ancestor. Kinship determined by consanguinity may not be terminated.

Degrees of Consanguinity



Trustee



Great Great Grandchild

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Degrees of Affinity

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			Great Grandparent-in-law or Step Great Grandparent	
		2		
		Grandparent-in-law or Step Grandparent		
	1		3	
	Father/Mother-in-law or Step Parent		Uncle/Aunt-in-law Or Step Uncle/Aunt	
1	2			
Trustee	Spouse	Brother/Sister-in-law Or Step Sibling		
	1		3	
	Step Child or Son/Daughter-in-law		Nephew/Niece-in-law or Step Nephew/Niece	
		2		
		Step Grandchild or Grandchild-in-law		
			3	
			Step Great Grandchild or Great Grandchild-in-law	

Gallatin Gateway Elementary

Adopted on: 6/26/17

Reviewed on:

Revised on:

1513 - R

BOARD OF TRUSTEES

Management Rights

The Board retains the right to operate and manage its affairs in such areas as but not limited to:

1. Direct employees;
2. Employ, dismiss, promote, transfer, assign, and retain employees;
3. Relieve employees from duties because of lack of work or funds under conditions where continuation of such work would be inefficient and nonproductive;
4. Maintain the efficiency of District operations;
5. Determine the methods, means, job classifications, and personnel by which District operations are to be conducted;
6. Take whatever actions may be necessary to carry out the missions of the District in situations of emergency;
7. Establish the methods and processes by which work is performed.

The Board reserves all other rights, statutory and inherent, as provided by state law.

The Board also reserves the right to delegate authority to the Superintendent for the ongoing direction of all District programs.

Cross Reference: 6110 Superintendent

Legal Reference: § 20-3-324, MCA Powers and duties
§ 39-31-303, MCA Management rights of public employers
Bonner School District No. 14 v. Bonner Education Association, MEA-MFT, NEA, AFT, AFL-CIO, (2008), 2008 MT 9

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1520

BOARD OF TRUSTEES

Revised on: 6/26/17, 4/20/22

Board/Staff Communications

Every reasonable means of communication is encouraged throughout the education community. Nevertheless, an organization must maintain some order and structure to promote efficient and effective communications.

Staff Communications to the Board

All official communications or reports to the Board, from supervisors, teachers, or other staff members, shall be submitted through the Superintendent. This procedure shall not deny any staff member the right to appeal to the Board from administrative decisions, provided that the Superintendent shall have been notified of the forthcoming appeal and that it is processed according to the applicable procedures for complaints and grievances. The provision does not limit or restrict employees from engaging in public comment during Board meetings as permitted by Montana law.

Board Communications to Staff

All official communications, policies, and directives of staff interest and concern will be communicated to staff members through the Superintendent. The Superintendent will employ all such media as are appropriate to keep staff fully informed of Board concerns and actions.

Visits to Schools

In accordance with Montana statutes, each trustee shall visit every school of the District at least once each school fiscal year to examine its condition and needs. As a courtesy, individual Board members interested in visiting schools should make arrangements for visitations through the principals of the various schools. Such visits shall be regarded as informal expressions of interest in school affairs and not as “inspections” or visits for supervisory or administrative purposes.

Social Interaction

Staff and Board members share a keen interest in schools and education. When they meet at social affairs and other functions, informal discussion about such matters as educational trends, issues, and innovations and general District problems can be anticipated. **Discussions of personalities or staff grievances are not appropriate.**

Legal Reference: § 20-3-324(21), MCA Powers and duties
 § 2-3-103, MCA Public Participation

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

1521 - R

BOARD OF TRUSTEES

Revised on: 06/15/15, 6/26/17

Board-Superintendent Relationship

The Board-Superintendent relationship is based on mutual respect for their complementary roles. The relationship requires clear communication of expectations regarding the duties and responsibilities of both the Board and the Superintendent.

The role of the Board shall be to:

- Define the Mission, Vision, and Philosophy of Education for the District;
- Determine long and short-term goals that will move the District toward its Mission and Vision;
- Provide stewardship of the fiscal resources in relation to the Mission of the District;
- Employ a superintendent and evaluate their performance;
- Monitor and evaluate the District and its progress in relation to the Mission, Vision and goals; and
- Advocate for students and quality public education.

The role of the Superintendent shall be to:

- Provide leadership to move the District toward its Mission and Vision by achieving established long and short-term goals;
- Manage the District within the parameters of established policy and law;
- Provide the Board with appropriate information to facilitate its deliberations and informed decision-making;
- Maintain avenues for effective communication with all stakeholders; and
- Advocate on behalf of the students, the District and public education.

Cross Reference: 6110 Superintendent

Legal Reference:	§ 20-4-401, MCA	Appointment and dismissal of district superintendent or county high school principal
	§ 20-4-402, MCA	Duties of district superintendent or county high school principal

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

Revised on: 6/26/17

1531

BOARD OF TRUSTEES

Trustee Expenses

Expenses for Board Members - In-District

The members of the trustees of any district may not receive compensation for their services as trustees. The members of the trustees who reside over 3 miles from the trustees' meeting place must be reimbursed at the rate as provided in 2-18-503 for every mile necessarily traveled between their residence and the meeting place and return in attending the regular and special meetings of the trustees, and all trustees must be similarly reimbursed for meetings called by the county superintendent. The travel reimbursement may be accumulated during the school fiscal year and paid at the end of the fiscal year, at the discretion of each trustee.

A trustee is entitled to collect mileage at a rate equal to the mileage allotment allowed by the United States internal revenue service for the current year for the first 1,000 miles and 3 cents less per mile for all additional miles traveled within a given calendar month.

A trustee must file a reimbursement for mileage form, prior to July 1 of each year, requesting reimbursement for the fiscal year. The form may be obtained from the District Clerk/Business Manager.

Expenses for Board Members at Out-of-District Meetings

Trustees normally attend workshops, training institutes, and conferences at both the state and national levels. The District will pay all legitimate costs for trustees to attend out-of-District meetings, at established rates for reimbursement set by the District:

1. Transportation as approved by the Board;
2. On-site transportation during the course of the meeting, i.e., bus, taxi, or rental car;
3. Hotel or motel costs for trustee, as necessary;
4. Food costs as necessary;
5. Telephone services for necessary communications with business or family, resulting from the trustee being away from Gallatin Gateway;
6. Incidental expenditures for tips and other necessary costs attributable to the trustee's attendance at a meeting; however, the District will not reimburse or pay for such items as liquor, expenses of a spouse, separate entertainment, or other unnecessary expenditures.

Cross Reference: 7336 Travel Allowances and Expenses
Mileage reimbursement form

Legal Reference: §2-18-503, MCA Mileage - allowance
§20-3-311, MCA Trustee reimbursement and compensation of secretary for joint board.

Gallatin Gateway Elementary

Adopted on: 6/26/17

Reviewed on:

Revised on:

1610 - R

BOARD OF TRUSTEES

Annual Goals and Objectives

Each year the Board will review the Strategic Plan for the District and will have available a written comprehensive philosophy of education with goals that reflect the District’s philosophy of education. The philosophy of education and goals shall be in writing and shall be available to all.

Legal Reference: 10.55.701, ARM Board of Trustees

Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on:

Revised on: 6/26/17

1620

BOARD OF TRUSTEES

Evaluation of Board

At the conclusion of each year, the Board may evaluate its own performance in terms of generally accepted principles of successful Board operations.

The Board may choose to evaluate the effectiveness of the processes it employs in carrying out the responsibilities of the District. Those processes include but are not limited to: team building, decision making, functions planning, communications, motivation, influence, and policy.

Gallatin Gateway Elementary

Adopted on: 6/26/17

Reviewed on:

Revised on:

1621

BOARD OF TRUSTEES

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In-Service Conference for Trustees

In keeping with the need for continued boardmanship development, the Board encourages the participation of its members at appropriate Board conferences, workshops, conventions, and District-sponsored in-service training sessions. Funds for participation at such meetings will be budgeted on an annual basis.

Gallatin Gateway Elementary

Adopted on: 6/26/17

Reviewed on:

1635

BOARD OF TRUSTEES

Revised on:

Internships

Internship means an agreement between a fully licensed Class 1, 2, or 3 educator, the school district, and a Montana accredited educator preparation program. Internships are permitted in endorsement areas approved by the Board of Public Education.

The Board recognizes the need to provide training opportunities for prospective teachers and administrators. Internships for those in the process of acquiring teaching endorsements and/or administrative credentials shall be considered and approved on an individual basis. The Superintendent or designee involved will review the internship proposal with the candidate and the university representative, much in the same manner as student teachers are assigned.

As part of an internship agreement, the parties must agree to the following:

- (a) the intern will complete the requirements for the appropriate endorsement within three years;
- (b) the school district will provide local supervision and support of the intern; and
- (c) the accredited educator preparation program will approve the coursework and provide support and periodic supervision.

A superintendent intern shall be supervised throughout the year by a licensed and endorsed superintendent contracted by the district, including participation in, and review of, and written concurrence in all performance evaluations of licensed staff completed by the intern.

An emergency authorization of employment granted by the Superintendent of Public Instruction pursuant to §20-4-111, MCA is not a license; therefore is not eligible for an internship.

Legal Reference:	§ 20-4-111, MCA	Emergency authorization of employment
	ARM 10.55.602	Definitions
	ARM 10.55.607	Internships
	ARM 10.55.702	Licensure and duties of District
		Administrator – District Superintendent
	ARM 10.57.412	Class 1 and 2 Endorsements
	ARM 10.57.413	Class 3 Administrative License

Uniform Complaint Procedure

The Board establishes this Uniform Complaint Procedure as a means to address complaints arising within the District. This Uniform Complaint Procedure is intended to be used for all complaints except those governed by a specific process in state or federal law that supersedes this process or collective bargaining agreement. Matters covered by a collective bargaining agreement will be reviewed in accordance with the terms of the applicable agreement.

The District requests all individuals to use this complaint procedure, when the individual believes the Board or its employees or agents have violated the individual’s rights under state or federal law or Board policy. Complaints against a building administrator shall be filed with the Superintendent. Complaints against the Superintendent or District administrator shall be filed with the Board.

The District will endeavor to respond to and resolve complaints without resorting to this formal complaint procedure and, when a complaint is filed, to address the complaint promptly and equitably. The right of a person to prompt and equitable resolution of a complaint filed hereunder will not be impaired by a person’s pursuit of other remedies. Use of this complaint procedure is not a prerequisite to pursue other remedies and use of this complaint procedure does not extend any filing deadline related to pursuit of other remedies.

Deadlines requiring District action in this procedure may be extended for reasons related but not limited to the District’s retention of legal counsel and District investigatory procedures.

Level 1: Informal

An individual with a complaint is first encouraged to discuss it with the appropriate employee or building administrator with the objective of resolving the matter promptly and informally. An exception is that a complaint of sexual harassment should be discussed directly with an administrator not involved in the alleged harassment.

Level 2: Building Administrator

When a complaint has not been or cannot be resolved at Level 1, an individual may file a signed and dated written complaint stating: (1) the nature of the complaint; (2) a description of the event or incident giving rise to the complaint, including any school personnel involved; and (3) the remedy or resolution requested. The written complaint must be filed within thirty (30) calendar days of the event or incident or from the date an individual could reasonably become aware of such event or incident. The applicability of the deadline is subject to review by the

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4 Superintendent to ensure the intent of this uniform complaint procedure is honored.

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6 When a complaint alleges violation of Board policy or procedure, the building administrator will
7 investigate and attempt to resolve the complaint. The administrator will respond in writing to the
8 complaint, within thirty (30) calendar days of the administrator's receipt of the complaint.

9
10 If the complainant has reason to believe the administrator's decision was made in error, the
11 complainant may request, in writing, that the Superintendent review the
12 administrator's decision. (See Level 3.) This request must be submitted to the Superintendent
13 within fifteen (15) calendar days of the administrator's decision.

14
15 When a complaint alleges sexual harassment or a violation of Title IX of the Education
16 Amendments of 1972 (the Civil Rights Act), Title II of the Americans with Disabilities Act of
17 1990, or Section 504 of the Rehabilitation Act of 1973, the Administrator shall turn the
18 complaint over to the applicable District nondiscrimination coordinator. The coordinator shall
19 ensure an investigation is completed in accordance with the applicable procedure. In the case of
20 a sexual harassment or Title IX complaint the applicable investigation and appeal procedure is
21 Policy 3225P or 5012P. In the case of a disability complaint, the coordinator shall complete an
22 investigation and file a report and recommendation with the Administrator for decision. Appeal
23 of a decision in a disability complaint will be handled in accordance with this policy.

24
25 Level 3: Superintendent

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27 If the complainant appeals the administrator's decision provided for in Level 2, the
28 Superintendent will review the complaint and the administrator's decision. The Superintendent
29 will respond in writing to the appeal, within thirty (30) calendar days of the Superintendent's
30 receipt of the written appeal. In responding to the appeal, the Superintendent may: (1) meet with
31 the parties involved in the complaint; (2) conduct a separate or supplementary investigation; (3)
32 engage an outside investigator or other District employees to assist with the appeal; and/or (4)
33 take other steps appropriate or helpful in resolving the complaint.

34
35 If the complainant has reason to believe the Superintendent's decision was made in error, the
36 complainant may request, in writing, that the Board consider an appeal of the Superintendent's
37 decision. (See Level 4.) This request must be submitted in writing to the Superintendent, within
38 fifteen (15) calendar days of the Superintendent's written response to the complaint, for
39 transmission to the Board.

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41 Level 4: The Board

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43 Upon written appeal of a complaint alleging a violation the individual's rights under state or
44 federal law or Board policy upon which the Board of Trustees has authority to remedy, the Board
45 may consider the Superintendent's decision in Level 2 or 3. Upon receipt of written request for
46 appeal, the Chair will either: (1) place the appeal on the agenda of a regular or special Board

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meeting, (2) appoint an appeals panel of not less than three trustees to hear the appeal and make a recommendation to the Board, or (3) respond to the complaint with an explanation of why the appeal will not be heard by the Board of Trustees in accordance with this policy. If the Chair appoints a panel to consider the appeal, the panel will meet to consider the appeal and then make written recommendation to the full Board. The Board will report its decision on the appeal, in writing, to all parties, within thirty (30) calendar days of the Board meeting at which the Board considered the appeal or the recommendation of the panel. A decision of the Board is final, unless it is appealed pursuant to Montana law within the period provided by law.

- Cross Reference: 3210 - Equal Educational Opportunity and Nondiscrimination
5010 - Equal Employment Opportunity and Nondiscrimination
3225-3225P – Sexual Harassment of Students
5012-5012P – Sexual Harassment of Employees
- Legal Reference: Title IX of the Education Amendments of 1972 (Civil Rights Act)
Title II of the Americans with Disabilities Act of 1990
§ 504 of the Rehabilitation Act of 1973

New Business
DISCUSSION ITEM

Superintendent's Evaluation

Presented by: Aaron Schwieterman

Background (to include funding source if applicable):

The superintendent's evaluation takes place yearly during January.

Recommended dates:

December 6, 2023 Review Superintendent Evaluation tool

December 20, 2023 Complete Superintendent Evaluation sent to you by the District Clerk

January 3, 2024 Work Study Session to review Superintendent's Evaluation feedback with Superintendent. This is an executive session.

January 17, 2024 Regular Governing Board meeting to discuss and consider Superintendent's Evaluation.

Recommendation: Administration recommends approval of the dates for the Superintendent's Evaluation.

New Business
DISCUSSION ITEM

Annual Facility Walkthrough

Presented by: Kelly Henderson

Background (to include funding source if applicable): Per policy 1520, the Governing Board should visit the school to complete a facility evaluation. Last year we broke up the dates for outside and inside.

Proposed dates:

October 5, 2023 at 4pm

October 9, 2023

October 10, 2023

October 12, 2023

Recommendation: The Governing Board selects _____ for the annual facility walkthrough.

New Business
DISCUSSION ITEM

Owner's Representative

Presented by: Brittney Bateman

Background (to include funding source if applicable): The district shared a request for proposals for an owner's representative. We received one response. After reviewing the proposal, Dan McGee's proposal

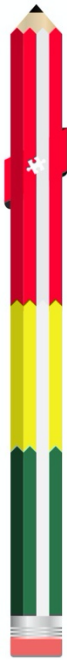
Recommendation: Administration recommends engaging with Mr. McGee as an owner's representative with the Facilities Committee.



Gallatin Gateway School

Gallatin Gateway Students

Vote YES!



Gallatin Gateway, PO
100 Mill Street
Gallatin Gateway, MT 59730

Paid For by -Gallatin Gateway School - Parents Organization

Owner's Representative - RFQ

Prepared for: Gallatin Gateway School
Prepared by: Daniel A. McGee, President
August 4, 2023
Gallatin Gateway School
P.O. Box 265 (100 Mill Street)
Gallatin Gateway, MT 59730

Original

Cover Letter/Statement of Interest - RE: Gallatin Gateway School –Request for Qualifications: Owner’s Construction Representative

Dear, Ms. Brittney Bateman,

Thank you so much for the opportunity to work with you and your school district on its facility expansion/renovations in Gallatin Gateway, Montana. This planning is an exciting step for your project and one well worth the undertaking.

Understanding that the goal of your RFQ scope is to identify and select a qualified Owner Construction Representative to assist you in the development of your district’s long-range planning efforts. My qualifications uniquely position Building, Mind, and Body and its team members for this role as your Owner Construction Representative.

Having the forethought as an owner to incorporate an owner representative early in the process to assist in developing your project's programming, budgeting, conceptual design, and public education shows that you understand the difficulty of establishing a construction project. In my 26 years of design, construction, and management experience, I have seen only a few districts think through this process quite the way your district has. I have had the pleasure of being involved in each of them.

BMB will offer you a professional approach to help you articulate your vision. We together will identify priorities and implement the project with the most significant impact in collaboration with you, your board of trustees, the community, and the end-users.

I am honored to share my experience and expertise to achieve this most exciting project for the Gallatin Gateway School and the community that it serves.

Sincerely,



Daniel A. McGee, President
Building, Mind, and Body, LLC.
8647 Wentland Court
Missoula, MT 59808
406.544.2815
danmc@buildingmindandbody.com

Re: Owner's Construction Representative services for Gallatin Gateway School from Building, Mind, and Body, LLC (BMB)

Thank you for allowing us to respond to your Request for Qualifications. This package is our response to your RFQ submission outline.

The following are in direct response to your RFQ document. *Please note that I have listed the related questions at the beginning of each paragraph to limit duplication and pages.*

The text in "Italics" indicated what RFQ questions are being answered in each section.

These include:

- *Documentation on significant projects of similar scope, with project description and professional involvement.*
- *Evidence of experience in construction management, field supervision, current construction methods and materials, technology design and applications: project manager: sustainable project management and construction (school buildings or other)*
- *Examples of services you have provided for previous school building or similar projects (including experience in evaluating how the project fulfilled the needs and requirements of the client).*
- *Demonstrate experience with projects budgeted at \$10M or more.*
- *Experience in architecture and design (including knowledge and experience with LEED projects). – **My architectural team will bring LEED knowledge and experience***
- *Submit resumes for each person or persons proposed to work on the project and define the scope of responsibilities for each person's role. – **Attached pages***

Evaluation Criteria:

- *Previous experience as Owner's Representative with similar projects*
- *References from Previous School District for similar projects*
- *Qualifications and experience of key personnel who will staff the project*
- *Experience with governmental agencies with jurisdiction*
- *Alignment with and understanding of District's goals and Mission*

Background and understanding

- *Previous experience as Owner's Representative with similar projects*
 - *Understanding of School needs and requirements*
- *Alignment with and understanding of District's goals and Mission*

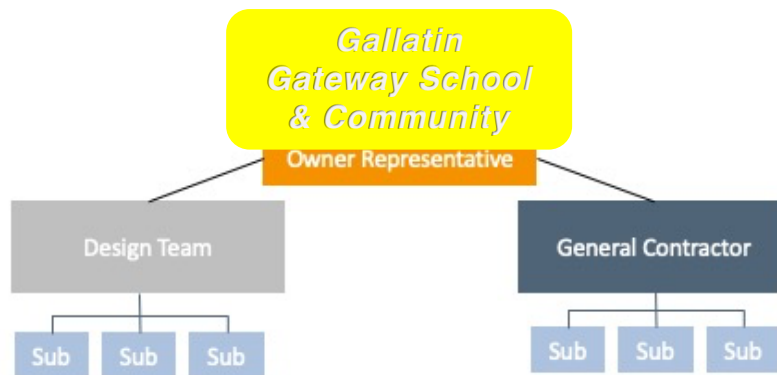
BMB will be the school district's direct link between the Architectural Design and General Contracting teams. There is no need for the District's administration, staff, or community to fully know the design and construction process. Your owner's representative will provide a filtered decision-making process that will allow for a quick, educated decision to be made.

Delivering this very complicated and delicate design/construction project will be an effort that requires a great deal of flexibility from all parties involved. My role as your District's owner representative will be to ensure that the project moves through the marketing of your bond smoothly and successfully. Once that is done, I will continue to guide the design and construction process using the findings of your planning efforts with minimal impact on the Staff, students, and community of the Gallatin Gateway School.

This project is like an enormous puzzle that has many moving parts. We, the owner's team, must establish your project goals based on the district visioning/master planning efforts and develop the guiding principles for the project. These principles will need to be reviewed early and often to ensure that our selected design/contracting teams have a clear direction. We will continue to define not only the District and communities' needs, but we will also continue to share our vision for a successful project. We will look to our selected partners for guidance and options to solve this puzzle.

We will drive the marketing, design, and construction process not as the lead but as a working partner within the community outreach, design, and construction process. BMB will carefully direct the facilities committee to provide clear and concise information to present to the community regarding district needs. These efforts will limit expending design hours (dollars) on items and issues that do not align with the District guiding principle. We will focus on meeting common project goals, not minimum design requirements, emphasizing cost control while still meeting project functionality goals.

The process will require many meetings for collaborations throughout the design as well as construction. Many owner representatives will look at this project as a lump sum project based on a percentage of construction costs. BMB will look at this project differently and collaborate as a partner with the District to create reasonable budgets for each phase of work.



BMB will lead any owner-required consultants and provide a list of potential sub-consultants that the District may need. Daniel McGee will be the contact person for the Gallatin Gateway School. Daniel McGee, and Building, Mind, and Body LLC, has successfully provided design, construction, and management services for the last ten years of his 26-year career. During that time, the above organization chart has always been the same, the names may be different, but the owner has always come first.

With BMB, no matter what stage of your project, visioning, planning, conceptual design, project budgeting, bond education, or bond marketing, you will only have one phone number to remember. The commitment of Daniel and his team will continue through the delivery of this project.

- *Documentation on significant projects of similar scope, with project description and professional involvement.*
- *Evidence of experience in construction management, field supervision, current construction methods and materials, technology design and applications: project manager: sustainable project management and construction (school buildings or other)*
- *Examples of services you have provided for previous school building or similar projects (including experience in evaluating how the project fulfilled the needs and requirements of the client).*
- *Demonstrate experience with projects budgeted at \$10M or more.*
- *Previous experience as Owner's Representative with similar projects*
 - *Pertinent experience of the applicant with preferred background in school construction*
- *Understanding of School needs and requirements*
 - *Community engagement and communication strategies*
- *Experience with governmental agencies with jurisdiction*
- *Alignment with and understanding of District's goals and Mission*

BMB, no matter what stage of your project, including visioning, planning, conceptual design, project budgeting, bond education, bond marketing, design, and construction. The list of reference projects and client list below, you will find similarities to your project. We have touched on and or participated in each phase of project development. The alignment of Gallatin Gateway School and BMB is evident when talking with your School Board and Staff. You will see in these referenced projects that you can begin to identify how these clients' needs match up precisely with what your school Board has shown in your current bonding documents.

Florence-Carlton School District – 2017 – Present

Superintendent Mr. Brian Rayburn

(406) 273-6751

rayburnb@florence.k12.mt.us



Daniel McGee has had a personal relationship with the District since 2009 and has worked as the District's resource for grant writing, construction manager, owner representative, and bond specialist. My work has included the writing and delivery of multiple Quality School Planning & Project grants.

Recent work has been acting as the District's owner representative in developing visioning/planning documents, pre-bond, bond marketing, design, and general contractor selection. This work has led to a project concept that represents the District's needs to the public. Early on, the administration realized that it would need assistance moving from the visioning process to the bond process.

Current Project: Owner's Construction Representative – Planning/Pre-Bond work, Bond marketing, Development of Design/General Contractors RFQ's, Design Management, and construction oversight.

Delivery Method: General Contractor/Construction Manager (GC/CM)

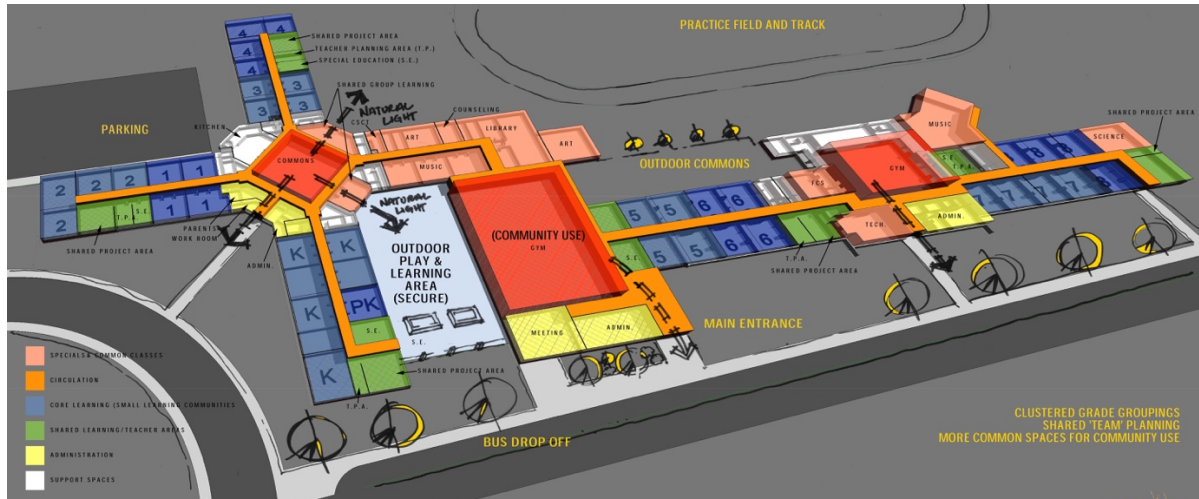
Project Budget: **\$15,975,000+**

Outcome: Preliminary design is being completed to allow for budgeting and commencement of Schematic design.

My contract included an architect as a sub-consultant to BMB to create preliminary visioning plans (complete by the district educational planner). This work leads to an image that can be used in public presentations and used to present the needs of the District within the local community. We hosted public meetings and working sessions with the district board of trustees to sell the idea. We also work with the District's various parent organizations to rally the public to support this bonding effort.

Having continuous representation and a familiar voice to work on your behalf is critical at this stage for the success of your project. BMB will have the pleasure to help implement your vision and allow for continuity of that vision to the design and construction teams.

Dillon Elementary School, Dillon, MT – 2009 – 2013
Superintendent Dr. Glen Johnson (Retired)
(406) 491-2858
gajohnson1980@gmail.com



Daniel McGee has had a personal relationship with the District since 2009 and has worked as the District's resource for grant writing, owner representative, and commissioning agent. My work has included the writing and delivery of multiple Quality School Planning & Project grants, planning & visioning efforts, bond development, education, and owner representation for the delivery of a new 9,000 square foot building and allowing the District to consolidate its resources under one roof. The project provided a new full-size junior high basketball court, weight room, library, and district offices and major renovation and upgrades to the two existing campus buildings.

Delivery method: Alternative Deliver "Design-Build."

Project Budget: **\$9.0 million**

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project on time and under budget.

My work for the District had been acting as the District's owner representative in developing visioning/planning documents precisely like the path of delivery you have chosen to take. Early on, the District realized that it would need assistance moving from the visioning process to the bond process. My work included hosting public meetings and working with the district board of trustees to sell the idea to the community.

Dr. Johnson, the board of trustees, and the facilities committee realized having a continuous representative and a familiar voice to work on the District behave was critical. Understanding that I had been part of its community's process for many years, it was a simple choice to work with myself to deliver the project.

Clinton Elementary School – 2012 - Present

Superintendent Tom Stack (New position at Superintendent of Big Fork School District 38)
(406) 544-7854



Daniel McGee has had a personal relationship with the District since 2012 and has worked as the District's resource for grant writing, owner representative, and bond specialist. My work included writing and delivering multiple Quality School Planning & Project grants, planning & visioning efforts, bond development, and education. BMB is now working as the owner's representation to deliver a new 15,000 square foot building addition accommodating the junior high classrooms, junior high gymnasium, and interior renovations.

Delivery methods: Alternative Deliver "Design-Build."

Project Budget: **\$4.0 million**

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project in a concise time frame. The (4) classroom addition will be completed in less than 2 ½ months. The District replaced (2) modular classrooms that could not be demolished until after school was out for the summer. The project is currently under budget and on schedule.

My work for the District has been acting as the District's owner representative in developing visioning/planning documents precisely like the path of delivery your District is considering. Early on, the administration realized that it would need assistance moving from the visioning process to the bond process. BMB was working with an Architect as a sub-consultant developed preliminary visioning plans (complete by the District's facilities committee and BMB). These efforts created something that could be used in public presentations to discuss the needs of the District with the local community members. Hosting public meetings, working with the district board of trustees to sell the idea, and working with the District's various parent organizations to rally the public to support this bonding effort.

Mr. Stack, the board of trustees, and the facilities committee realized having a continuous representative and a familiar voice to work on the District behave was critical. Understanding that I had been part of its community's process for many years, it was a simple choice to work with BMB to deliver the project.

Superior School District – 2012 - Present
Superintendent Scott Kinney
(406) 822-3600
srkinney@ssd3.us



Daniel McGee has had a personal relationship with the District since 2012 and has worked as the District's resource for grant writing, owner representative, and bond specialist. My work has included the writing and delivering multiple Quality School Planning & Project grants, planning & visioning efforts, bond development and education, and owner representation for the delivery of a new 15,000 square foot building addition accommodating the junior high classrooms, carrier technology classroom, and shop spaces and a new health enhancement classroom.

Delivery methods: Alternative Deliver "Design-Build."

Project Budget: **\$3.5 million**

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project in less than 12 months. The project was under budget and had a very successful outcome.

My work for the District has been acting as the District's owner representative in developing visioning/planning documents precisely like the path of delivery you have chosen to take. Early on, the administration realized that it would need assistance moving from the visioning process to the bond process. My work included working with an Architect as a sub-consultant to BMB to put very preliminary visioning plans (complete by the District's facilities committee and BMB) into something that could be used in public presentations to discuss the needs of the District with the local community members. Hosting public meetings, working with the district board of trustees to sell the idea, and working with the District's various parent organizations to rally the public to support this bonding effort.

Mr. Kinney, the board of trustees, and the facilities committee realized having a continuous representative and a familiar voice to work on the District behave was critical. Understanding that I had been part of its community's process for many years, it was a simple choice to work with BMB to deliver the project.

Butte School District – Butte, MT – 2009 - 2017

Facilities Director Jed Hoopes (Retired)
(406) 533-2490

Delivery method: Alternative Deliver "Design-Build."

Project Budget: \$5.5 million+

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project on time and within budget.

Montana City School District – Montana City, MT – 2011 - 2015

Superintendent Tony Kloker
(406) 442-6779
tonykl@metnet.mt.gov

Delivery method: Alternative Deliver "Design-Build."

Project Budget: \$5.4 million

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project on time and under budget.

Additional school projects completed or begun within the last ten years.

Stevensville Public Schools, Stevensville, MT – Design development of an elementary boiler replacement, campus energy audit, and owner's representative services.

The project budget of \$235 thousand.

Superintendent Dr. Bob Moore
(406) 825-3114
mooreb@stevensville.k12.mt.us

Laurel Public Schools, Laurel, MT – Design development of an alternative delivery project that upgraded and delivered building performance efficiency.

The project budget of \$1.7 million.

Superintendent Tim Bronk/Linda Filpula
(406) 628-8623
linda_filpula@laurel.k12.mt.us

Additional school projects completed or begun within the last ten years with changes in administration.

Eureka Public School District – Master Planning & Visioning, currently assisting in capital planning and marketing – Asking for \$15.0 million. Developing proposal for Bond assistance – Superintendent Jim Mephram

Cascade Public Schools - Feasibility study to correct facility deficiencies, Master Planning for facilities renovations – Asked for \$3.2 million not approved by voters. Superintendent Justin Barnes (not with the District any longer)

- *Qualifications and experience of key personnel who will staff the project*
 - *A commitment of specific personnel to the project*

Daniel will be 100% available throughout the entire duration of this project delivery. As a team, we will define the duration of your project; this will allow us to understand better and develop the project cost/time estimates. Building, Mind, and Body, LLC is currently under contract for Owner Representative services with Florence-Carlton School District, Beaverhead County High School, and Loyola Sacred Heart High School.

- Daniel's selected partners will be able to provide the coverage to the Gallatin Gateway School for the project's duration. We will coordinate to ensure the District has a continuous point of contact based on the best resource available.
- External sub-consultants and describe their roles and responsibilities with the Project Team – Resourced to limit overhead requirements for Pre-Bond services
 - In2itive Architecture – Marie Wilson – Owner/Principal – LEED Specialist
 - Jules Landis – Project Architect
 - Eryn Schwehr – Project Architect
 - Marisa Kramer – Project Architect
 - Mark Little – Architectural Associate
 - Emma Buboise – Office Administration

Additional resources available through BMB:

- Multi-State School Administration, and Facility Management Experience
- Educational Planning – Facilities Master Planning
- Environmental Consulting -
- Geotechnical Engineering –

Daniel A. McGee

(406) 544-2815
danmc@buildingmindandbody.com

2291 W. Broadway, Suite 004
Missoula, MT 59808

Professional Profile/Objective

Twenty six (26) years of experience in the design and construction profession, including successful senior project management responsibility and experience in the fitness, healthcare, educational, and financial markets. My skills, experience, and qualifications are in direct alignment with your request for qualifications needs and my goal to further my business relationships.

Related Experience

President/Owner, Building Mind and Body, LLC; Missoula, MT 2008- Present
Owner Representative, Educational Design consulting (Visioning/Planning), Bond Marketing/Bond Education, Private Fitness Center / Provide Fitness Design. Consulting for owners that need new and or updated facilities, equipment selection, and/or materials selection, procurement and installation.

Achievement: Camp Mak-A-Dream – Board of Directors – President

Nationally recognized speaker in the fitness and medical fitness market.

Account Executive, McKinstry & Co.; Missoula, MT 2009 - 2017
Account Executive/Program Management/Project Management and Senior Project Management for medium to large construction projects for different industries throughout the state of Montana. Work include development, contracts, financing, design in public markets that include K-12, Higher Education, Cities and Towns as well as private corporations.

Market Sector Manager (Sport Sector)/Project Manager, CTA Architects/Engineers; Missoula, MT
2003 - 2009

Business Development/Program Management/Project Management for the Wellness and Fitness Market throughout the United States and in other global markets. Managed financial institute design, project management and all developments within this industry sector for the organization. Also provided Project Management leadership to construction and redevelopment projects for K-12 schools throughout Montana. This work allowed me to create of Building, Mind, and Body, LLC.

Senior Design Production Manager/Project Manager, KDW Architects; Seattle, WA 1993 - 2003

Business Development, Project Management/Production Lead for Data Center design and construction management sector, as well as the Lead Production sector. This position included Telecom business development, design, lead production management responsibilities.

Design and Sales Consultant, Walker's Custom Cabinets; Seattle, WA
Business Development/Customer Relations Management/Designer

1993

Skills

Senior Project Management and Project Management; Sales; Project Budgeting; Design and Development; Account and Client Services; Excellent Communication, Organizational, Negotiation, and Facilitation Skills; Leadership and Team Skills; AutoCAD and Microsoft Suite of Software.

Education

Phoenix Institute of Technology, Associates Degree - Architectural Drafting and Design
1991

Phoenix Institute of Technology, Associated Degree - Computer Aided Architectural Drafting and Design 1993

[References Available Upon Request](#)

Related Project experience

- Superior School District – Junior High Building Addition, and Renovation - \$3.3 Million
- Clinton Elementary School - Junior High Building Addition, and Renovation - \$4.0
- Florence-Carlton School District – K-5 Building Addition, and Renovations - \$15.95 Million
- Million Montana City School District – Mechanical systems upgrade, 18,000 square foot addition
- Hamilton School District, Washington Elementary Mechanical System Upgrades, Grant Assistance
- Dillon Elementary School, Grant Assistance, Planning Efforts, School Expansion Bond Marketing (Successful \$9.3 Million Dollar Bond Request)
- Polson School District, Grant Assistance, Energy Upgrades, High School Bond Marketing (Successful \$2.3 Million Dollar Bond Request)
- Butte High School, Grant Assistance, Energy Upgrades, Mechanical Upgrades – 6 phases of work completed over the past 7 years, \$3,500,000 of work completed.
- Florence-Carlton School District, Grant Assistance, Lighting Upgrades and Visioning & Master Planning - \$500,000 of electrical and mechanical upgrades completed.
- Laurel Public Schools, Grant Assistance, Lighting Upgrades and Visioning & Master Planning - \$500,000 of electrical and mechanical upgrades completed
- Manhattan School District – Mechanical systems upgrade - \$2,000,000 project cost
- Clinton School District – Master Planning & Visioning efforts, currently assisting in capital planning and marketing - Asking for \$2.8 to \$3,300,000
- Superior School District – Master Planning & Visioning, currently assisting in capital planning and marketing - Asking for \$3,230,000
- Eureka School District – Master Planning & Visioning, currently assisting in capital planning and marketing – Asking for \$18,000,000

Non-School related Experience – Hospitals, Financial Institutions, Technology Companies, Wellness

- Mineral Community Hospital, Superior MT, Clark Fork Valley Hospital, Plains, MT, First Interstate Bank, Missoula, MT, Missoula Federal Credit Union, Missoula, MT, Granite Health and Fitness, Billings, MT
- Microsoft Corporation, Redmond, WA, Qwest Communications, Seattle, WA, Provienna Fitness, Chicago IL.,
- The Summit, Kalispell MT.
- AT&T, Seattle, WA.
- The Athletic Club, Bermuda
- Gold's Gym International, Dallas, TX

MEET OUR TEAM

Marie Wilson, AIA, NCARB, LEED BD+C – Owner/Principal Architect



Education:

Master of Architecture – 2004 – Montana State University

With Honors, Salutatorian, AIA Henry Adams CERT, MSU Award of Excellence, Tau Sigma Delta

Bachelor of Environmental Design – 2003 – Montana State University

Bachelor of Science – 1995 – Rocky Mountain College

Associates of Science – 1993 – Sheridan Community College

Registrations:

Montana & Wyoming

Expertise:

Office, Multifamily, Educational and Wedding/Winery Venues

I2A Contribution:

Architect and Tireless Leader

Marie is both the laugh and the steady. She is quick to say yes, can follow through with any size project and works well with any combination of team.

In2itive Architecture – Owner – 2008-Present

- Types of Projects: Commercial and Residential
- Responsibilities: Project Management, Design, Proposals, Scheduling, Budgets, Construction Administration
- Project Range: \$25,000-\$23M
- Projects Include: New Construction & Renovation:
 - Commercial Offices, Retail, Multi Family, Educational and Institutional
- Notable Projects:
 - MLEA: Renovation to Historic Dormitories, Cafeteria & Office Addition in Helena, MT
 - MHA-DB: 22 unit multifamily
 - Burton: 6 plex
 - Consumer Direct: 70,000 sf Office Building in Missoula, MT
 - Clinton School: 15,000 sf Addition and 30,000 sf renovation in Clinton, MT
 - Superior Junior High Addition: 15,000 sf addition in Superior, MT
 - Coca-Cola High Country: 68,000 sf Industrial/Warehouse
 - McKinstry Renovation: 3,000 sf office/shop renovation in Missoula, MT
 - Hamilton Job Service Renovation: 3,000 sf office renovation in Hamilton, MT
 - Bayern Brewery: Various addition/renovation projects in Missoula, MT
 - Bretz RV Warehouse: 7,000 sf shop building in Missoula, MT
 - Hellgate Elementary Upgrade: 15,000 sf lighting and ceiling upgrade in Missoula, MT

Encompass v2, LLC – Owner – 2013-2016

- Types of Projects: Multifamily & Commercial
- Responsibilities: Architect of Record, CFO, Project Management, Design, Proposals, Scheduling, Budgets, Construction Administration
- Project Range: \$1.6-22M
- Notable Projects
 - Missoula Food Bank: 22,000 sf Mercantile and new home for the Food Bank in Missoula, MT
 - Katabatic Brewery and Apartment: 3,000 sf mixed use project in Livingston, MT
 - Capitol Court Apartments: 60 unit affordable housing development in Cheyenne, WY
 - Rock Creek Apartments: 12 unit affordable housing development in Gillette, WY
 - Sage Valley Apartments: 54 unit affordable housing development in Gillette, WY
 - Pheasant Ridge Apartments: 36 unit affordable housing development in Gillette, WY
 - Stoneridge Apartments: 48 unit affordable housing development in Bozeman, MT
 - Larkspur Commons: 136 unit affordable housing development in Bozeman, MT
 - Apsaalooke Warrior Apartments: 15 unit affordable veterans housing development in Crow Agency, WY
 - Glacier Place Apartments: 48 unit affordable housing development in Laramie, WY
 - Good Food Store: 41,000 sf natural food grocer renovation and remodel project in Missoula, MT

MMW Architects – Project Architect – 2010-2013

- Types of Projects: Institutional, Medical, Multifamily and Residential
- Responsibilities: Project Management, Proposals, Scheduling, Budgets, Construction Administration
- Project Range: \$1.6-13M
- Notable Projects:
 - MSU H&PE: \$12.6-million addition and remodel to the physical education complex location on the Montana State University campus in Bozeman, MT
 - School Boards Association: multiuse commercial/retail building located at the Great Northern Town Center in Helena, MT
 - Montana Department of Corrections: multifaceted project including a statewide master planning feasibility study, statewide energy assessment, Montana State Prison, ADA upgrades and addition to maximum security housing pod.

Jules Landis, AIA – Project Architect



Education: Bachelor of Environmental Design – 1997 – University of Colorado at Boulder

Registrations: Colorado & Washington

Expertise: Lending Institutions, Hospitality, Educational

I2A Contribution: Content Manager

Jules is In2itive's right hand and sometimes also the left! He is the whole enchilada, an eternal optimist and as a veteran architect himself can fulfill any role a project requires of him with grace!

Relevant Experience:

- MT Law Enforcement Academy: Renovation to Historic Dormitories, Cafeteria & Office Addition in Helena, MT
- Superior High School/Junior High Addition in Superior, MT
- Clinton Elementary School Addition and Renovation in Clinton, MT
- Consumer Direct Care Network – Phase II in Missoula, MT
- Coca-Cola High Country: 68,000 sf Industrial/Warehouse

Eryn Schwehr, AIA, NCARB – Project Architect



Education: Master of Architecture – 2003 – Montana State University
With Honors, Minor in English Literature

Registrations: Montana

Expertise: Multifamily, Mixed Use

I2A Contribution: *Eryn's discipline and efficiency brings some order to the office which can otherwise be sometimes chaotic! Her aesthetic is unsurpassed and her relationship with developers keeps her multitasking.*

Relevant Experience:

- MT Law Enforcement Academy: Renovation to Historic Dormitories, Cafeteria & Office Addition in Helena, MT
- Mountain Lodge: Boyne Properties Dormitory Project, 65 Rooms
- Meadowview Condominiums HRDC: Big Sky Workforce Housing, Overall Project Planning, 26 Buildings, 52 units
- Mixed Use: Lots 3,4,5,6,7; All main level commercial with residential above
- Fort Peck Community College Faculty Housing (Project Architect) & Fort Peck Dormitory (Design, Production)

- Deer Lodge Medical Center

Emma Duboise – Office Administration



Education: Business Administration Major– Intended Graduate of 2021 – University of Montana Western

Registrations: NA

Expertise: Office Management, CAD, Project Delivery

I2A Contribution: The Organizer

Emma is instrumental in smoothing out the ups and downs of the architectural chaos. She has become an essential link in our team and will tackle anything with enthusiasm.

Additional information for your use during the next phase of selection if included in that process.

- *Fee Structure and Cost*

BMB believes in developing a scope of work that will help define the number of hours required to place each piece of this highly complex puzzle. Many owner representatives will provide a fee proposal based on a percentage of construction; this is a great way to estimate the potential cost of these services but a lousy way to contract. We will look at each task, assign hours for each of these tasks, and bill only the hours we use.

In contracting, we want to only negotiate based on a percentage when we know the actual cost; an example would be when reviewing fee proposals for your architectural team, we will want to negotiate a small fee to start schematic design. Only after the contractor has provided the initial project construction budget do we want to agree or negotiate a fee on a percentage of construction basis.

BMB approach will begin to break the puzzle into pieces (phases) and estimate the hours needed to complete that phase. A phased approach will allow you, the owner, to understand what we feel should take in hours to complete each phase of work to complete the puzzle. We will provide you with a breakdown of design and construction phases and a list of tasks associated with each phase and provide you with the total number of hours needed to complete that task. If the hours are not required to complete a task, those hours are not billed. If additional hours are required, we will take responsibility for underestimating what we need.

PROPOSED PROJECT RATES

RATE SCHEDULE

Principal	\$125/hr
Project Architect/Manager	\$100/hr
Architect in Training III	\$85/hr
Architect in Training II	\$75/hr
Architect in Training I	\$65/hr
Clerical	\$40/hr

REIMBURSABLE

Consultants (if required)	Cost +5%
Consultant Reimbursable Expense	Cost
Printing & Reproductions	Cost
Mileage	.58/mile
Deliveries	Cost + Mileage
Postage	Cost
Other Project Expense	Cost

Cover Letter/Statement of Interest - RE: Gallatin Gateway School –Request for Qualifications: Owner’s Construction Representative

Dear, Ms. Brittney Bateman,

Thank you so much for the opportunity to work with you and your school district on its facility expansion/renovations in Gallatin Gateway, Montana. This planning is an exciting step for your project and one well worth the undertaking.

Understanding that the goal of your RFQ scope is to identify and select a qualified Owner Construction Representative to assist you in the development of your district’s long-range planning efforts. My qualifications uniquely position Building, Mind, and Body and its team members for this role as your Owner Construction Representative.

Having the forethought as an owner to incorporate an owner representative early in the process to assist in developing your project's programming, budgeting, conceptual design, and public education shows that you understand the difficulty of establishing a construction project. In my 26 years of design, construction, and management experience, I have seen only a few districts think through this process quite the way your district has. I have had the pleasure of being involved in each of them.

BMB will offer you a professional approach to help you articulate your vision. We together will identify priorities and implement the project with the most significant impact in collaboration with you, your board of trustees, the community, and the end-users.

I am honored to share my experience and expertise to achieve this most exciting project for the Gallatin Gateway School and the community that it serves.

Sincerely,



Daniel A. McGee, President
Building, Mind, and Body, LLC.
8647 Wentland Court
Missoula, MT 59808
406.544.2815
danmc@buildingmindandbody.com

Re: Owner's Construction Representative services for Gallatin Gateway School from Building, Mind, and Body, LLC (BMB)

Thank you for allowing us to respond to your Request for Qualifications. This package is our response to your RFQ submission outline.

The following are in direct response to your RFQ document. *Please note that I have listed the related questions at the beginning of each paragraph to limit duplication and pages.*

The text in "Italics" indicated what RFQ questions are being answered in each section.

These include:

- *Documentation on significant projects of similar scope, with project description and professional involvement.*
- *Evidence of experience in construction management, field supervision, current construction methods and materials, technology design and applications: project manager: sustainable project management and construction (school buildings or other)*
- *Examples of services you have provided for previous school building or similar projects (including experience in evaluating how the project fulfilled the needs and requirements of the client).*
- *Demonstrate experience with projects budgeted at \$10M or more.*
- *Experience in architecture and design (including knowledge and experience with LEED projects). – **My architectural team will bring LEED knowledge and experience***
- *Submit resumes for each person or persons proposed to work on the project and define the scope of responsibilities for each person's role. – **Attached pages***

Evaluation Criteria:

- *Previous experience as Owner's Representative with similar projects*
- *References from Previous School District for similar projects*
- *Qualifications and experience of key personnel who will staff the project*
- *Experience with governmental agencies with jurisdiction*
- *Alignment with and understanding of District's goals and Mission*

Background and understanding

- *Previous experience as Owner's Representative with similar projects*
 - *Understanding of School needs and requirements*
- *Alignment with and understanding of District's goals and Mission*

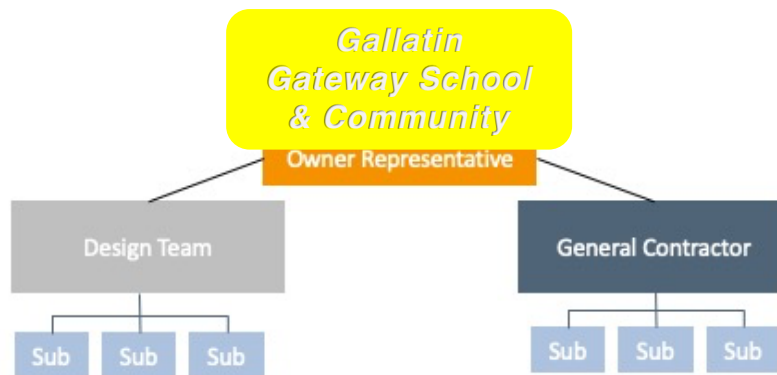
BMB will be the school district's direct link between the Architectural Design and General Contracting teams. There is no need for the District's administration, staff, or community to fully know the design and construction process. Your owner's representative will provide a filtered decision-making process that will allow for a quick, educated decision to be made.

Delivering this very complicated and delicate design/construction project will be an effort that requires a great deal of flexibility from all parties involved. My role as your District's owner representative will be to ensure that the project moves through the marketing of your bond smoothly and successfully. Once that is done, I will continue to guide the design and construction process using the findings of your planning efforts with minimal impact on the Staff, students, and community of the Gallatin Gateway School.

This project is like an enormous puzzle that has many moving parts. We, the owner's team, must establish your project goals based on the district visioning/master planning efforts and develop the guiding principles for the project. These principles will need to be reviewed early and often to ensure that our selected design/contracting teams have a clear direction. We will continue to define not only the District and communities' needs, but we will also continue to share our vision for a successful project. We will look to our selected partners for guidance and options to solve this puzzle.

We will drive the marketing, design, and construction process not as the lead but as a working partner within the community outreach, design, and construction process. BMB will carefully direct the facilities committee to provide clear and concise information to present to the community regarding district needs. These efforts will limit expending design hours (dollars) on items and issues that do not align with the District guiding principle. We will focus on meeting common project goals, not minimum design requirements, emphasizing cost control while still meeting project functionality goals.

The process will require many meetings for collaborations throughout the design as well as construction. Many owner representatives will look at this project as a lump sum project based on a percentage of construction costs. BMB will look at this project differently and collaborate as a partner with the District to create reasonable budgets for each phase of work.



BMB will lead any owner-required consultants and provide a list of potential sub-consultants that the District may need. Daniel McGee will be the contact person for the Gallatin Gateway School. Daniel McGee, and Building, Mind, and Body LLC, has successfully provided design, construction, and management services for the last ten years of his 26-year career. During that time, the above organization chart has always been the same, the names may be different, but the owner has always come first.

With BMB, no matter what stage of your project, visioning, planning, conceptual design, project budgeting, bond education, or bond marketing, you will only have one phone number to remember. The commitment of Daniel and his team will continue through the delivery of this project.

-
- *Documentation on significant projects of similar scope, with project description and professional involvement.*
 - *Evidence of experience in construction management, field supervision, current construction methods and materials, technology design and applications: project manager: sustainable project management and construction (school buildings or other)*
 - *Examples of services you have provided for previous school building or similar projects (including experience in evaluating how the project fulfilled the needs and requirements of the client).*
 - *Demonstrate experience with projects budgeted at \$10M or more.*

 - *Previous experience as Owner's Representative with similar projects*
 - *Pertinent experience of the applicant with preferred background in school construction*
 - *Understanding of School needs and requirements*
 - *Community engagement and communication strategies*
 - *Experience with governmental agencies with jurisdiction*
 - *Alignment with and understanding of District's goals and Mission*

BMB, no matter what stage of your project, including visioning, planning, conceptual design, project budgeting, bond education, bond marketing, design, and construction. The list of reference projects and client list below, you will find similarities to your project. We have touched on and or participated in each phase of project development. The alignment of Gallatin Gateway School and BMB is evident when talking with your School Board and Staff. You will see in these referenced projects that you can begin to identify how these clients' needs match up precisely with what your school Board has shown in your current bonding documents.

Florence-Carlton School District – 2017 – Present

Superintendent Mr. Brian Rayburn

(406) 273-6751

rayburnb@florence.k12.mt.us



Daniel McGee has had a personal relationship with the District since 2009 and has worked as the District's resource for grant writing, construction manager, owner representative, and bond specialist. My work has included the writing and delivery of multiple Quality School Planning & Project grants.

Recent work has been acting as the District's owner representative in developing visioning/planning documents, pre-bond, bond marketing, design, and general contractor selection. This work has led to a project concept that represents the District's needs to the public. Early on, the administration realized that it would need assistance moving from the visioning process to the bond process.

Current Project: Owner's Construction Representative – Planning/Pre-Bond work, Bond marketing, Development of Design/General Contractors RFQ's, Design Management, and construction oversight.

Delivery Method: General Contractor/Construction Manager (GC/CM)

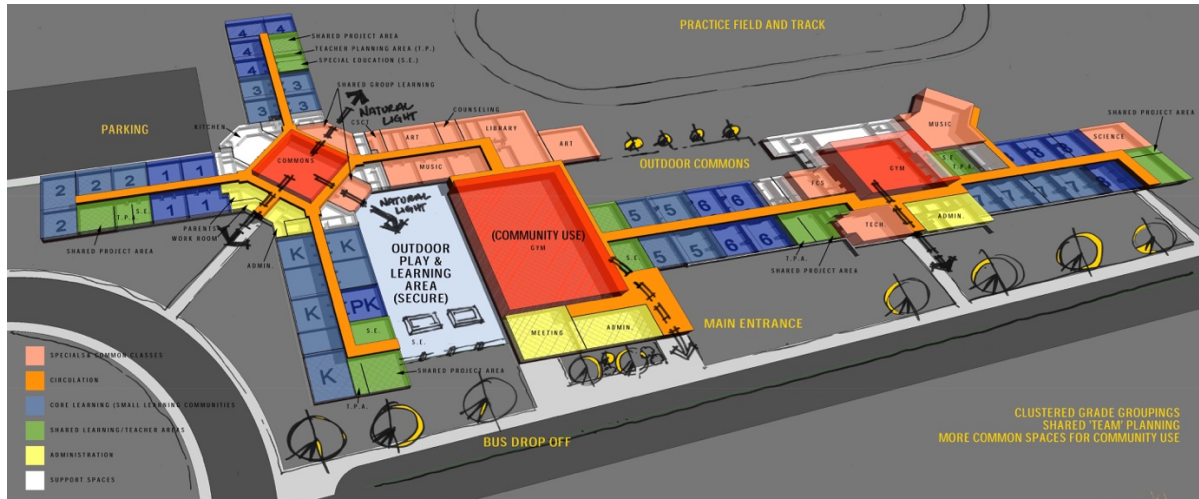
Project Budget: **\$15,975,000+**

Outcome: Preliminary design is being completed to allow for budgeting and commencement of Schematic design.

My contract included an architect as a sub-consultant to BMB to create preliminary visioning plans (complete by the district educational planner). This work leads to an image that can be used in public presentations and used to present the needs of the District within the local community. We hosted public meetings and working sessions with the district board of trustees to sell the idea. We also work with the District's various parent organizations to rally the public to support this bonding effort.

Having continuous representation and a familiar voice to work on your behalf is critical at this stage for the success of your project. BMB will have the pleasure to help implement your vision and allow for continuity of that vision to the design and construction teams.

Dillon Elementary School, Dillon, MT – 2009 – 2013
Superintendent Dr. Glen Johnson (Retired)
(406) 491-2858
gajohnson1980@gmail.com



Daniel McGee has had a personal relationship with the District since 2009 and has worked as the District's resource for grant writing, owner representative, and commissioning agent. My work has included the writing and delivery of multiple Quality School Planning & Project grants, planning & visioning efforts, bond development, education, and owner representation for the delivery of a new 9,000 square foot building and allowing the District to consolidate its resources under one roof. The project provided a new full-size junior high basketball court, weight room, library, and district offices and major renovation and upgrades to the two existing campus buildings.

Delivery method: Alternative Deliver "Design-Build."

Project Budget: **\$9.0 million**

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project on time and under budget.

My work for the District had been acting as the District's owner representative in developing visioning/planning documents precisely like the path of delivery you have chosen to take. Early on, the District realized that it would need assistance moving from the visioning process to the bond process. My work included hosting public meetings and working with the district board of trustees to sell the idea to the community.

Dr. Johnson, the board of trustees, and the facilities committee realized having a continuous representative and a familiar voice to work on the District behave was critical. Understanding that I had been part of its community's process for many years, it was a simple choice to work with myself to deliver the project.

Clinton Elementary School – 2012 - Present

Superintendent Tom Stack (New position at Superintendent of Big Fork School District 38)
(406) 544-7854



Daniel McGee has had a personal relationship with the District since 2012 and has worked as the District's resource for grant writing, owner representative, and bond specialist. My work included writing and delivering multiple Quality School Planning & Project grants, planning & visioning efforts, bond development, and education. BMB is now working as the owner's representation to deliver a new 15,000 square foot building addition accommodating the junior high classrooms, junior high gymnasium, and interior renovations.

Delivery methods: Alternative Deliver "Design-Build."

Project Budget: **\$4.0 million**

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project in a concise time frame. The (4) classroom addition will be completed in less than 2 ½ months. The District replaced (2) modular classrooms that could not be demolished until after school was out for the summer. The project is currently under budget and on schedule.

My work for the District has been acting as the District's owner representative in developing visioning/planning documents precisely like the path of delivery your District is considering. Early on, the administration realized that it would need assistance moving from the visioning process to the bond process. BMB was working with an Architect as a sub-consultant developed preliminary visioning plans (complete by the District's facilities committee and BMB). These efforts created something that could be used in public presentations to discuss the needs of the District with the local community members. Hosting public meetings, working with the district board of trustees to sell the idea, and working with the District's various parent organizations to rally the public to support this bonding effort.

Mr. Stack, the board of trustees, and the facilities committee realized having a continuous representative and a familiar voice to work on the District behave was critical. Understanding that I had been part of its community's process for many years, it was a simple choice to work with BMB to deliver the project.

Superior School District – 2012 - Present
Superintendent Scott Kinney
(406) 822-3600
srkinney@ssd3.us



Daniel McGee has had a personal relationship with the District since 2012 and has worked as the District's resource for grant writing, owner representative, and bond specialist. My work has included the writing and delivering multiple Quality School Planning & Project grants, planning & visioning efforts, bond development and education, and owner representation for the delivery of a new 15,000 square foot building addition accommodating the junior high classrooms, carrier technology classroom, and shop spaces and a new health enhancement classroom.

Delivery methods: Alternative Deliver "Design-Build."

Project Budget: **\$3.5 million**

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project in less than 12 months. The project was under budget and had a very successful outcome.

My work for the District has been acting as the District's owner representative in developing visioning/planning documents precisely like the path of delivery you have chosen to take. Early on, the administration realized that it would need assistance moving from the visioning process to the bond process. My work included working with an Architect as a sub-consultant to BMB to put very preliminary visioning plans (complete by the District's facilities committee and BMB) into something that could be used in public presentations to discuss the needs of the District with the local community members. Hosting public meetings, working with the district board of trustees to sell the idea, and working with the District's various parent organizations to rally the public to support this bonding effort.

Mr. Kinney, the board of trustees, and the facilities committee realized having a continuous representative and a familiar voice to work on the District behave was critical. Understanding that I had been part of its community's process for many years, it was a simple choice to work with BMB to deliver the project.

Butte School District – Butte, MT – 2009 - 2017

Facilities Director Jed Hoopes (Retired)
(406) 533-2490

Delivery method: Alternative Deliver "Design-Build."

Project Budget: \$5.5 million+

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project on time and within budget.

Montana City School District – Montana City, MT – 2011 - 2015

Superintendent Tony Kloker
(406) 442-6779
tonykl@metnet.mt.gov

Delivery method: Alternative Deliver "Design-Build."

Project Budget: \$5.4 million

Outcome: Using an alternative delivery method has allowed the District to work with its selected partners to deliver this construction project on time and under budget.

Additional school projects completed or begun within the last ten years.

Stevensville Public Schools, Stevensville, MT – Design development of an elementary boiler replacement, campus energy audit, and owner's representative services.

The project budget of \$235 thousand.

Superintendent Dr. Bob Moore
(406) 825-3114
mooreb@stevensville.k12.mt.us

Laurel Public Schools, Laurel, MT – Design development of an alternative delivery project that upgraded and delivered building performance efficiency.

The project budget of \$1.7 million.

Superintendent Tim Bronk/Linda Filpula
(406) 628-8623
linda_filpula@laurel.k12.mt.us

Additional school projects completed or begun within the last ten years with changes in administration.

Eureka Public School District – Master Planning & Visioning, currently assisting in capital planning and marketing – Asking for \$15.0 million. Developing proposal for Bond assistance – Superintendent Jim Mephram

Cascade Public Schools - Feasibility study to correct facility deficiencies, Master Planning for facilities renovations – Asked for \$3.2 million not approved by voters. Superintendent Justin Barnes (not with the District any longer)

- *Qualifications and experience of key personnel who will staff the project*
 - *A commitment of specific personnel to the project*

Daniel will be 100% available throughout the entire duration of this project delivery. As a team, we will define the duration of your project; this will allow us to understand better and develop the project cost/time estimates. Building, Mind, and Body, LLC is currently under contract for Owner Representative services with Florence-Carlton School District, Beaverhead County High School, and Loyola Sacred Heart High School.

- Daniel's selected partners will be able to provide the coverage to the Gallatin Gateway School for the project's duration. We will coordinate to ensure the District has a continuous point of contact based on the best resource available.
- External sub-consultants and describe their roles and responsibilities with the Project Team – Resourced to limit overhead requirements for Pre-Bond services
 - In2itive Architecture – Marie Wilson – Owner/Principal – LEED Specialist
 - Jules Landis – Project Architect
 - Eryn Schwehr – Project Architect
 - Marisa Kramer – Project Architect
 - Mark Little – Architectural Associate
 - Emma Buboise – Office Administration

Additional resources available through BMB:

- Multi-State School Administration, and Facility Management Experience
- Educational Planning – Facilities Master Planning
- Environmental Consulting -
- Geotechnical Engineering –

Daniel A. McGee

(406) 544-2815
danmc@buildingmindandbody.com

2291 W. Broadway, Suite 004
Missoula, MT 59808

Professional Profile/Objective

Twenty six (26) years of experience in the design and construction profession, including successful senior project management responsibility and experience in the fitness, healthcare, educational, and financial markets. My skills, experience, and qualifications are in direct alignment with your request for qualifications needs and my goal to further my business relationships.

Related Experience

President/Owner, Building Mind and Body, LLC; Missoula, MT 2008- Present
Owner Representative, Educational Design consulting (Visioning/Planning), Bond Marketing/Bond Education, Private Fitness Center / Provide Fitness Design. Consulting for owners that need new and or updated facilities, equipment selection, and/or materials selection, procurement and installation.

Achievement: Camp Mak-A-Dream – Board of Directors – President

Nationally recognized speaker in the fitness and medical fitness market.

Account Executive, McKinstry & Co.; Missoula, MT 2009 - 2017
Account Executive/Program Management/Project Management and Senior Project Management for medium to large construction projects for different industries throughout the state of Montana. Work include development, contracts, financing, design in public markets that include K-12, Higher Education, Cities and Towns as well as private corporations.

Market Sector Manager (Sport Sector)/Project Manager, CTA Architects/Engineers; Missoula, MT
2003 - 2009

Business Development/Program Management/Project Management for the Wellness and Fitness Market throughout the United States and in other global markets. Managed financial institute design, project management and all developments within this industry sector for the organization. Also provided Project Management leadership to construction and redevelopment projects for K-12 schools throughout Montana. This work allowed me to create of Building, Mind, and Body, LLC.

Senior Design Production Manager/Project Manager, KDW Architects; Seattle, WA 1993 - 2003

Business Development, Project Management/Production Lead for Data Center design and construction management sector, as well as the Lead Production sector. This position included Telecom business development, design, lead production management responsibilities.

Design and Sales Consultant, Walker's Custom Cabinets; Seattle, WA
Business Development/Customer Relations Management/Designer

1993

Skills

Senior Project Management and Project Management; Sales; Project Budgeting; Design and Development; Account and Client Services; Excellent Communication, Organizational, Negotiation, and Facilitation Skills; Leadership and Team Skills; AutoCAD and Microsoft Suite of Software.

Education

Phoenix Institute of Technology, Associates Degree - Architectural Drafting and Design
1991

Phoenix Institute of Technology, Associated Degree - Computer Aided Architectural Drafting and Design 1993

[References Available Upon Request](#)

Related Project experience

- Superior School District – Junior High Building Addition, and Renovation - \$3.3 Million
- Clinton Elementary School - Junior High Building Addition, and Renovation - \$4.0
- Florence-Carlton School District – K-5 Building Addition, and Renovations - \$15.95 Million
- Million Montana City School District – Mechanical systems upgrade, 18,000 square foot addition
- Hamilton School District, Washington Elementary Mechanical System Upgrades, Grant Assistance
- Dillon Elementary School, Grant Assistance, Planning Efforts, School Expansion Bond Marketing (Successful \$9.3 Million Dollar Bond Request)
- Polson School District, Grant Assistance, Energy Upgrades, High School Bond Marketing (Successful \$2.3 Million Dollar Bond Request)
- Butte High School, Grant Assistance, Energy Upgrades, Mechanical Upgrades – 6 phases of work completed over the past 7 years, \$3,500,000 of work completed.
- Florence-Carlton School District, Grant Assistance, Lighting Upgrades and Visioning & Master Planning - \$500,000 of electrical and mechanical upgrades completed.
- Laurel Public Schools, Grant Assistance, Lighting Upgrades and Visioning & Master Planning - \$500,000 of electrical and mechanical upgrades completed
- Manhattan School District – Mechanical systems upgrade - \$2,000,000 project cost
- Clinton School District – Master Planning & Visioning efforts, currently assisting in capital planning and marketing - Asking for \$2.8 to \$3,300,000
- Superior School District – Master Planning & Visioning, currently assisting in capital planning and marketing - Asking for \$3,230,000
- Eureka School District – Master Planning & Visioning, currently assisting in capital planning and marketing – Asking for \$18,000,000

Non-School related Experience – Hospitals, Financial Institutions, Technology Companies, Wellness

- Mineral Community Hospital, Superior MT, Clark Fork Valley Hospital, Plains, MT, First Interstate Bank, Missoula, MT, Missoula Federal Credit Union, Missoula, MT, Granite Health and Fitness, Billings, MT
- Microsoft Corporation, Redmond, WA, Qwest Communications, Seattle, WA, Provienna Fitness, Chicago IL.,
- The Summit, Kalispell MT.
- AT&T, Seattle, WA.
- The Athletic Club, Bermuda
- Gold's Gym International, Dallas, TX

MEET OUR TEAM

Marie Wilson, AIA, NCARB, LEED BD+C – Owner/Principal Architect



Education:

Master of Architecture – 2004 – Montana State University

With Honors, Salutatorian, AIA Henry Adams CERT, MSU Award of Excellence, Tau Sigma Delta

Bachelor of Environmental Design – 2003 – Montana State University

Bachelor of Science – 1995 – Rocky Mountain College

Associates of Science – 1993 – Sheridan Community College

Registrations:

Montana & Wyoming

Expertise:

Office, Multifamily, Educational and Wedding/Winery Venues

I2A Contribution:

Architect and Tireless Leader

Marie is both the laugh and the steady. She is quick to say yes, can follow through with any size project and works well with any combination of team.

In2itive Architecture – Owner – 2008-Present

- Types of Projects: Commercial and Residential
- Responsibilities: Project Management, Design, Proposals, Scheduling, Budgets, Construction Administration
- Project Range: \$25,000-\$23M
- Projects Include: New Construction & Renovation:
 - Commercial Offices, Retail, Multi Family, Educational and Institutional
- Notable Projects:
 - MLEA: Renovation to Historic Dormitories, Cafeteria & Office Addition in Helena, MT
 - MHA-DB: 22 unit multifamily
 - Burton: 6 plex
 - Consumer Direct: 70,000 sf Office Building in Missoula, MT
 - Clinton School: 15,000 sf Addition and 30,000 sf renovation in Clinton, MT
 - Superior Junior High Addition: 15,000 sf addition in Superior, MT
 - Coca-Cola High Country: 68,000 sf Industrial/Warehouse
 - McKinstry Renovation: 3,000 sf office/shop renovation in Missoula, MT
 - Hamilton Job Service Renovation: 3,000 sf office renovation in Hamilton, MT
 - Bayern Brewery: Various addition/renovation projects in Missoula, MT
 - Bretz RV Warehouse: 7,000 sf shop building in Missoula, MT
 - Hellgate Elementary Upgrade: 15,000 sf lighting and ceiling upgrade in Missoula, MT

Encompass v2, LLC – Owner – 2013-2016

- Types of Projects: Multifamily & Commercial
- Responsibilities: Architect of Record, CFO, Project Management, Design, Proposals, Scheduling, Budgets, Construction Administration
- Project Range: \$1.6-22M
- Notable Projects
 - Missoula Food Bank: 22,000 sf Mercantile and new home for the Food Bank in Missoula, MT
 - Katabatic Brewery and Apartment: 3,000 sf mixed use project in Livingston, MT
 - Capitol Court Apartments: 60 unit affordable housing development in Cheyenne, WY
 - Rock Creek Apartments: 12 unit affordable housing development in Gillette, WY
 - Sage Valley Apartments: 54 unit affordable housing development in Gillette, WY
 - Pheasant Ridge Apartments: 36 unit affordable housing development in Gillette, WY
 - Stoneridge Apartments: 48 unit affordable housing development in Bozeman, MT
 - Larkspur Commons: 136 unit affordable housing development in Bozeman, MT
 - Apsaalooke Warrior Apartments: 15 unit affordable veterans housing development in Crow Agency, WY
 - Glacier Place Apartments: 48 unit affordable housing development in Laramie, WY
 - Good Food Store: 41,000 sf natural food grocer renovation and remodel project in Missoula, MT

MMW Architects – Project Architect – 2010-2013

- Types of Projects: Institutional, Medical, Multifamily and Residential
- Responsibilities: Project Management, Proposals, Scheduling, Budgets, Construction Administration
- Project Range: \$1.6-13M
- Notable Projects:
 - MSU H&PE: \$12.6-million addition and remodel to the physical education complex location on the Montana State University campus in Bozeman, MT
 - School Boards Association: multiuse commercial/retail building located at the Great Northern Town Center in Helena, MT
 - Montana Department of Corrections: multifaceted project including a statewide master planning feasibility study, statewide energy assessment, Montana State Prison, ADA upgrades and addition to maximum security housing pod.

Jules Landis, AIA – Project Architect



Education: Bachelor of Environmental Design – 1997 – University of Colorado at Boulder

Registrations: Colorado & Washington

Expertise: Lending Institutions, Hospitality, Educational

I2A Contribution: Content Manager

Jules is In2itive's right hand and sometimes also the left! He is the whole enchilada, an eternal optimist and as a veteran architect himself can fulfill any role a project requires of him with grace!

Relevant Experience:

- MT Law Enforcement Academy: Renovation to Historic Dormitories, Cafeteria & Office Addition in Helena, MT
- Superior High School/Junior High Addition in Superior, MT
- Clinton Elementary School Addition and Renovation in Clinton, MT
- Consumer Direct Care Network – Phase II in Missoula, MT
- Coca-Cola High Country: 68,000 sf Industrial/Warehouse

Eryn Schwehr, AIA, NCARB – Project Architect



Education: Master of Architecture – 2003 – Montana State University
With Honors, Minor in English Literature

Registrations: Montana

Expertise: Multifamily, Mixed Use

I2A Contribution: *Eryn's discipline and efficiency brings some order to the office which can otherwise be sometimes chaotic! Her aesthetic is unsurpassed and her relationship with developers keeps her multitasking.*

Relevant Experience:

- MT Law Enforcement Academy: Renovation to Historic Dormitories, Cafeteria & Office Addition in Helena, MT
- Mountain Lodge: Boyne Properties Dormitory Project, 65 Rooms
- Meadowview Condominiums HRDC: Big Sky Workforce Housing, Overall Project Planning, 26 Buildings, 52 units
- Mixed Use: Lots 3,4,5,6,7; All main level commercial with residential above
- Fort Peck Community College Faculty Housing (Project Architect) & Fort Peck Dormitory (Design, Production)

- Deer Lodge Medical Center

Emma Duboise – Office Administration



Education: Business Administration Major– Intended Graduate of 2021 – University of Montana Western

Registrations: NA

Expertise: Office Management, CAD, Project Delivery

I2A Contribution: The Organizer

Emma is instrumental in smoothing out the ups and downs of the architectural chaos. She has become an essential link in our team and will tackle anything with enthusiasm.

Additional information for your use during the next phase of selection if included in that process.

- *Fee Structure and Cost*

BMB believes in developing a scope of work that will help define the number of hours required to place each piece of this highly complex puzzle. Many owner representatives will provide a fee proposal based on a percentage of construction; this is a great way to estimate the potential cost of these services but a lousy way to contract. We will look at each task, assign hours for each of these tasks, and bill only the hours we use.

In contracting, we want to only negotiate based on a percentage when we know the actual cost; an example would be when reviewing fee proposals for your architectural team, we will want to negotiate a small fee to start schematic design. Only after the contractor has provided the initial project construction budget do we want to agree or negotiate a fee on a percentage of construction basis.

BMB approach will begin to break the puzzle into pieces (phases) and estimate the hours needed to complete that phase. A phased approach will allow you, the owner, to understand what we feel should take in hours to complete each phase of work to complete the puzzle. We will provide you with a breakdown of design and construction phases and a list of tasks associated with each phase and provide you with the total number of hours needed to complete that task. If the hours are not required to complete a task, those hours are not billed. If additional hours are required, we will take responsibility for underestimating what we need.

PROPOSED PROJECT RATES

RATE SCHEDULE

Principal	\$125/hr
Project Architect/Manager	\$100/hr
Architect in Training III	\$85/hr
Architect in Training II	\$75/hr
Architect in Training I	\$65/hr
Clerical	\$40/hr

REIMBURSABLE

Consultants (if required)	Cost +5%
Consultant Reimbursable Expense	Cost
Printing & Reproductions	Cost
Mileage	.58/mile
Deliveries	Cost + Mileage
Postage	Cost
Other Project Expense	Cost

New Business
ACTION ITEM

Homeschool Student Request

Presented by: Kelly Henderson

Background (to include funding source if applicable): Minka Rare is requesting to play athletics at GGS while being homeschooled.

Recommendation: Administration recommends approval of Minka Rare to play athletics at GGS.

Dear Mrs. Henderson and Board Members,

My name is [REDACTED] and I am in the [REDACTED] grade. This year I will be homeschooling, but I would like to play sports for Gallatin Gateway School. I plan to play volleyball, basketball, and track.

I am writing this letter to ask for your permission to play for Gallatin Gateway. I feel comfortable and I'm excited to play on the team with my friends and I would like to play sports in the town where I live.

Thank you for supporting me and I can't wait to start volleyball.

Sincerely,

[REDACTED]

New Business
ACTION ITEM

Policy Series 7000 Financial Management

Presented by: Kelly Henderson

Background (to include funding source if applicable): This is the first reading of Policy Series 7000.

Recommendation: Administration recommends approval Policy Series 7000 upon first reading.

TIN GATEWAY SCHOOL DISTRICT
7000 SERIES FINANCIAL MANAGEMENT
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1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 Reviewed on: 6/26/17

4 7008

FINANCIAL MANAGEMENT

5 Nonresident Student Attendance Agreement (Tuition/Transportation Costs)

9 Whenever a nonresident student is to be enrolled in the District, either by choice or by
10 placement, an attendance agreement must be filed with the Board. Terms of the agreement must
11 include tuition rate, the party responsible for paying tuition and the schedule of payment,
12 transportation charges, if any, and the party responsible for paying transportation costs.

14 Tuition rates shall be determined annually, consistent with Montana law and approved by the
15 Board.
16

17
18
19 Cross Reference: 3141 Discretionary Nonresident Student Attendance Policy

20
21
22 Legal Reference: § 20-5-314, MCA Reciprocal attendance agreement with adjoining
23 state or province
24 § 20-5-320, MCA Attendance with discretionary approval
25 § 20-5-321, MCA Attendance with mandatory approval – tuition and
26 transportation
27 § 20-5-322, MCA Residency determination – notification – appeal for
28 attendance agreement
29 § 20-5-323, MCA Tuition and transportation rates
30 10.10.301, ARM Calculating Tuition Rates
31
32

1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 Reviewed on: 6/26/17

4 7110

FINANCIAL MANAGEMENT

8
9
10
11
12 Budget and Program Planning

13
14 The annual budget is evidence of the Board’s commitment to the objectives of the instruction
15 programs. The budget supports immediate and long-range goals and established priorities within
16 all areas – instructional, noninstructional, and administrative programs.

17
18 Before presentation of a proposed budget for adoption, the Superintendent and district clerk will
19 prepare, for the Board’s consideration, recommendations (with supporting documentation)
20 designed to meet the needs of students, within the limits of anticipated revenues.

1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 Reviewed on: 6/26/17

4 7121

FINANCIAL MANAGEMENT

5 Budget Adjustments

8
9
10 When any budgeted fund line item is in excess of the amount required, the Board may transfer any of
11 the excess appropriation to another line item(s) within the same fund.

12
13 The Board authorizes the administration to transfer line items within the same budgeted fund to
14 adjust line item overdrafts or to meet special line item needs. Line item budget transfers to adjust line
15 item overdrafts are at the discretion of the administrators.

16
17 Total budget expenditures for each fund as adopted in the final budget shall constitute the
18 appropriations of the District for the ensuing fiscal year. The Board will be limited in the incurring
19 of expenditures to the total of such appropriations.

20
21 With timely notice of a public meeting, trustees, by majority vote of those present, may declare by
22 resolution that a budget amendment (in addition to the final budget) is necessary. Budget
23 amendments are authorized for specified reasons by § 20-9-161, MCA. The resolution must state the
24 facts constituting the need for the budget amendment, the funds affected by the budget amendment,
25 the anticipated source of financing, the estimated amount of money required to finance the budget
26 amendment, and the time and place the trustees will meet for the purpose of considering and adopting
27 the budget amendment for the current school fiscal year.

28
29 The meeting to adopt a budget amendment will be open and will provide opportunity for any
30 taxpayer to appear and be heard. Budget procedures will be consistent with statutory requirements.
31 When applicable, the District will apply for state financial aid to supplement the amount to be
32 collected from local taxes.

34	Legal Reference:	§ 20-9-133, MCA	Adoption and expenditure limitations of final budget
35		§ 20-9-161, MCA	Definition of budget amendment for budgeting
36			purposes
37		§ 20-9-162, MCA	Authorization for budget amendment adoption
38		§ 20-9-163, MCA	Resolution for budget amendment – petition to
39			superintendent of public instruction
40		§ 20-9-164, MCA	Notice of budget amendment resolution
41		§ 20-9-165, MCA	Budget amendment limitation, preparation, and
42			adoption procedures
43		§ 20-9-166, MCA	State financial aid for budget amendments
44		§ 20-9-208, MCA	Transfers among appropriation items of fund –
45			transfers from fund to fund
46			
47			

1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 Reviewed on: 6/26/17

4 7210

5 FINANCIAL MANAGEMENT

8
9
10
11
12 Revenues

13
14 The District will seek and utilize all available sources of revenue for financing its educational
15 programs, including revenues from non-tax, local, state, and federal sources. The District will
16 properly credit all revenues received to appropriate funds and accounts as specified by federal
17 and state statutes and accounting and reporting regulations for Montana school districts.

18
19 The District will collect and deposit all direct receipts of revenues as necessary but at least once
20 monthly. The District will make an effort to collect all revenues due from all sources, including
21 but not limited to rental fees, bus fees, fines, tuition fees, other fees and charges. Uncollectible
22 checks may be turned over to the county attorney for collection.

23
24
25
26 Legal Reference: Title 20, Chapter 9, MCA Finance
27 Title 10, Chapter 10, ARM Special Accounting Practices
28

1 Gallatin Gateway Elementary

2 Adopted on: 2/19/20

3 Reviewed on:

4 7215

FINANCIAL MANAGEMENT

5 Obligations and Loans

9
10 The District may, without a vote of the electors of the District, secure loans from or issue and sell
11 to the board of investments or a bank, building and loan association, savings and loan
12 association, or credit union that is a regulated lender under Montana law, obligations for the
13 purpose of financing all or a portion of:

- 14
- 15 A. the costs of vehicles and equipment and construction of buildings used primarily
 - 16 for the storage and maintenance of vehicles and equipment;
 - 17 B. the costs associated with renovating, rehabilitating, and remodeling facilities,
 - 18 including but not limited to roof repairs, heating, plumbing, electrical systems,
 - 19 and cost-saving measures as defined in Montana law;
 - 20 C. the costs of nonpermanent modular classrooms necessary for student instruction
 - 21 when existing buildings of the district are determined to be inadequate by the
 - 22 trustees;
 - 23 D. any other expenditure that the district is otherwise authorized to make including
 - 24 the payment of settlements of legal claims and judgments; and
 - 25 E. the costs associated with the issuance and sale of the obligations.

26
27 Before seeking to secure a loan or issue and sell obligations to a regulated lender, the District
28 shall first offer the board of investments a written notice of the board's right of first refusal. If
29 the board of investments accepts the offer to issue a loan or purchase obligations, the board shall
30 provide a written response to the trustees by the later of:

- 31
- 32 A. 120 days following delivery of the trustees' offer to the board; or
 - 33 B. the day after the next meeting of the board of investments.

34
35 If the trustees have not received a written acceptance by the deadline the District may seek to
36 secure a loan or issue and sell an obligation to a regulated lender as outlined in this policy and
37 Montana law.

38
39 The District may access its major maintenance aid account for school facility projects, including
40 the payment of principal and interest on obligations issued in accordance with this policy and
41 Montana law for school facility projects,

42
43 Legal Reference: Section 20-9-471, MCA - Issuance of obligations
44 Section 20-9-525, MCA - School major maintenance aid account

1 Gallatin Gateway Elementary

2 Adopted on: 03/24/2014

3 Reviewed on: 6/26/17

4 7216

5 FINANCIAL MANAGEMENT

8
9 Fundraising

10
11 The Board recognizes that fundraisers may be conducted by the District or by recognized student
12 body organizations and activities. This policy applies to all fundraising by District staff members
13 and on behalf of recognized student body organizations and activities, including, without
14 limitation, school stores, charitable giving campaigns, and concessions/vending. This policy does
15 not apply to school support organizations that may conduct approved fundraisers.

16
17 Any fundraising activity to be conducted must be approved in advance by the superintendent.
18 Students shall not be required to participate in any District-, school-, or student body
19 organization/activity-sponsored fundraiser. No money raised by the fundraiser may be expended
20 without the prior approval of the Superintendent.

21
22 The Superintendent or designee shall establish procedures for fundraisers conducted by the
23 District or by recognized student body organizations and activities.

24
25 Cross References: Policy 4005 School Support Associations
26 Policy 7025 Extra and Co-Curricular Funds
27
28

1 Gallatin Gateway Elementary

2 Adopted on:
3 4/21/21

3 7220

PERSONNEL

4 Use of Federal Title I Funds

7
8
9 The School District will ensure that federal Title I funds, are used only to supplement, and not
10 supplant, state and local funds that would, in the absence of federal funds, be spent on Title I
11 programs or services supported by federal funds.

12
13 Title I funds will not take the place of funds supporting education services that are to be provided
14 to all students. The School District uses Title I funds only to supplement funds that would, in the
15 absence of Title I funds, be made available from state and local non-Federal sources for the
16 education of children participating in Title I programs.

17
18
19 Cross Reference: 2160 – Title I Family Engagement

20
21 Legal Reference: Elementary and Secondary Education Act, Section 1118(b)(1)

1 Gallatin Gateway Elementary

2 Adopted on: 4/21/21

3 7220P

PERSONNEL

Reviewed on:

4

7 Use of Federal Title I Funds Methodology

8
9 In accordance with the Every Student Succeeds Act (ESSA), Gallatin Gateway Elementary
10 School District has adopted this procedure to ensure that Title I-A federal funds are
11 supplementing District resources and not supplanting District resources. The procedure
12 documents that the School District’s neutrally determined distribution of state and local funds to
13 each school within the boundaries of the School District is in compliance with federal law.

14
15 Gallatin Gateway Elementary School District is a district with a single school and is exempt
16 from the methodology requirement.

17
18 The School District determines the resource allocation on total enrollment for each school as if
19 the state and local funds are the only resources each school is receiving. Each school is given
20 additional allocations for other needs such as technology, supplies, and additional necessary
21 costs.

22
23 The School District groups schools by elementary or secondary grade span. Each grade span may
24 receive a different per student amount, but all schools are treated the same whether or not these
25 schools are served under Title I-A. There are _____ elementary students in the School District.

26
27 The School District’s state and local funds are allocated in a per student calculation. For full-time
28 equivalency staff including administrators, educators, instructional staff, and school counselors,
29 including salaries and benefits \$_____is allocated per elementary student.

30
31 Additional necessary costs, such as professional development, technology, lunch, library
32 supplies, transportation, student activities, utilities, maintenance, safety, and security, are
33 allocated at \$_____per student in all schools.

34
35 Cross Reference: 7220 – Use of Federal Title I Funds

36
37 Legal Reference: Elementary and Secondary Education Act, Section 1118(b)(1)

1 Gallatin Gateway Elementary

2 Adopted on: 6/26/17

3 Reviewed on:

4 7225

PERSONNEL

8
9 Crowdfunding

10
11 The District understands that raising funds or acquiring materials via a crowdfunding platform is available
12 to employees through the internet. The Gallatin Gateway School District prohibits employees from
13 raising funds or acquiring materials through crowdfunding platforms.

14
15 Any employee found to have used crowdfunding platforms to raise funds or purchase materials for school
16 purposes may result in disciplinary action under policy 5255.

17
18
19 Cross Reference: Policy 5255 Disciplinary Action
20

1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 7251

4 FINANCIAL MANAGEMENT

5 Reviewed on:

8 Disposal and Sale of School District Property

9 Without a Vote

10 The Board is authorized to dispose of a site, building, or any other real or personal property of
11 the District, that is or is about to become abandoned, obsolete, undesirable, or unsuitable for
12 school purposes.

13 To effect proper disposal, the trustees shall pass a resolution stating their decision concerning
14 property disposal. The resolution will not become effective until fourteen (14) days after the
15 resolution is published in a newspaper of general circulation in the District.

16 Should any taxpayer properly protest the resolution during the fourteen (14) days after the date
17 of publication, the trustees shall submit testimony to the court with jurisdiction.

18 Once the resolution is effective, or if appealed the decision has been upheld by the court, the
19 trustees shall sell or dispose of the real or personal property in a reasonable manner determined
20 to be in the best interests of the District. Proceeds from the sale of fixed assets can be deposited
21 to the general, debt service, building, or any other appropriate fund.

22 With a Vote

23 Unless the property can be disposed of without a vote, the Board has the power to dispose of all
24 District property, only when the qualified electors of the District approve of such action at an
25 election called for such approval in accordance with the provisions in Section 20-6-603, MCA.

26 The money realized from the sale or disposal of real or personal property of the district must be
27 credited to the debt service fund, building fund, general fund, or other appropriate fund, at the
28 discretion of the trustees.

29	30	Legal Reference:	§ 20-6-603, MCA	Trustees' authority to acquire or dispose of sites and
	31			buildings – when election required
	32		§ 20-6-604, MCA	Sale of property when resolution passed after
	33			hearing – appeal procedure
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1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 Reviewed on: 6/26/17

4 7260

FINANCIAL MANAGEMENT

5 Donations, Endowments, Gifts, and Investments

6 The Board may accept gifts, endowments, legacies, and devises subject to the lawful conditions
7 imposed by the donor or without any conditions imposed. Unless otherwise specified by the
8 donor, when a district receives a donation the trustees may deposit the donation in any budgeted
9 or non-budgeted fund at the discretion of the trustees and may thereafter transfer any portion of
10 the donation to any other fund at the discretion of the trustees. If the trustees accept a donation
11 and the donor specifies the donation for an endowment, the trustees shall deposit the donation in
12 the endowment fund. Neither the Board nor the Superintendent will approve any gifts that are
13 inappropriate.
14

15 If the District deposited donated funds in an endowment fund without specific instruction by the
16 donor, the Board may move the donated funds and any accumulated interest to any other
17 budgeted or nonbudgeted fund of the District and may spend donated funds and any accumulated
18 interest unless restricted by condition imposed by the donor.
19

20 The Board authorizes the Superintendent to establish procedures for determining the suitability
21 or appropriateness of all gifts received and accepted by the District. Once accepted, donated
22 funds are public funds subject to state law. Donated funds may not be transferred to a private
23 entity. Benefactors may not adjust or add terms or conditions to donated funds after the donation
24 has been accepted.
25

26 The Board directs that all school funds be invested in a prudent manner so as to achieve
27 maximum economic benefit to the District. Funds not needed for current obligations may be
28 invested in investment options as set out in Montana statutes, whenever it is deemed
29 advantageous for the District to do so.
30

31 Educational Foundations may exist in the community, but are not managed, directed, or
32 approved by the Board of Trustees.
33

34	Legal Reference:	§ 20-6-601, MCA	Power to accept gifts
35		§ 20-7-803, MCA	Authority to accept gifts
36		§ 20-9-212, MCA	Duties of county treasurer
37		§ 20-9-213(4), MCA	Duties of trustees
38		§ 20-9-604, MCA	Gifts, legacies, devises, and administration of endowment fund
39		§ 72-30-209, MCA	Appropriation for expenditure or accumulation of endowment fund – rules of construction

1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 Reviewed on: 6/26/17

4 7310

5 FINANCIAL MANAGEMENT

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11
12 Budget Implementation and Execution

13
14 Once adopted by the Board, the operating budget shall be administered by the Superintendent's
15 designees. All actions of the Superintendent/designees in executing programs and/or activities
16 delineated in that budget are authorized according to these provisions:

- 17
18 1. Expenditure of funds for employment and assignment of staff shall meet legal
19 requirements of the state of Montana and adopted Board policies.
- 20
21 2. Funds held for contingencies may not be expended without Board approval.
- 22
23 3. A listing of warrants describing goods and/or services for which payment has been made
24 must be presented for Board ratification each month.
- 25
26 4. Purchases will be made according to the legal requirements of the state of Montana and
27 adopted Board policy.

28
29
30 Legal Reference: § 20-3-332, MCA Personal immunity of trustees
31 § 20-9-213, MCA Duties of trustees
32
33
34

1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 7320

Reviewed on:

4 FINANCIAL MANAGEMENT Revised on: 10/08/12 07/08/13

9 Purchasing

10 The Board adopts all applicable provisions of the Montana Procurement Act.

11 Authorization and Control

12
13
14
15 The Superintendent is authorized to direct expenditures and purchases within limits of the
16 detailed annual budget for the school year. The Board must approve purchase of capital outlay
17 items, when the aggregate total of a requisition exceeds \$15,000, except the Superintendent shall
18 have the authority to make capital outlay purchases without advance approval when necessary to
19 protect the interests of the District or the health and safety of staff or students. The
20 Superintendent will establish requisition and purchase order procedures to control and maintain
21 proper accounting of expenditure of funds. Staff who obligate the District without proper
22 authorization may be held personally responsible for payment of such obligations.

23 Bids and Contracts

24
25
26 Whenever it is in the interest of the District, the District will execute a contract for any building
27 furnishing, repairing, purchasing or other work for the benefit of the District. If the sum of the
28 contract or work exceeds Eighty Thousand Dollars (\$80,000), the District will call for formal
29 bids by issuing public notice as specified in statute. Specifications will be prepared and made
30 available to all vendors interested in submitting a bid. The contract shall be awarded to the
31 lowest responsible bidder, except that the trustees may reject any or all bids as per § 18-4-307,
32 MCA as stated below in the legal reference. The Board, in making a determination as to which
33 vendor is the lowest responsible bidder, will take into consideration not only the amount of each
34 bid, but will also consider the skill, ability, and integrity of a vendor to do faithful, conscientious
35 work and to promptly fulfill the contract according to its letter and spirit. Bidding requirements
36 do not apply to a registered professional engineer, surveyor, real estate appraiser, or registered
37 architect; a physician, dentist, pharmacist, or other medical, dental, or health care provider; an
38 attorney; a consulting actuary; a private investigator licensed by any jurisdiction; a claims
39 adjuster; or an accountant licensed under Title 37, Chapter 50.

40
41 Advertisement for bid must be made once each week for two (2) consecutive weeks, and a
42 second (2nd) publication must be made not less than five (5) nor more than twelve (12) days
43 before consideration of bids.

44
45 The Superintendent will establish bidding and contract-awarding procedures. Bid procedures
46 will be waived only as specified in statute. Any contract required to be let for bid shall contain
47 language to the following effect:

7 *In making a determination as to which vendor is the lowest responsible bidder, if*
 8 *any, the District will take into consideration not only the pecuniary ability of a*
 9 *vendor to perform the contract, but will also consider the skill, ability, and*
 10 *integrity of a vendor to do faithful, conscientious work and promptly fulfill the*
 11 *contract according to its letter and spirit. References must be provided and will*
 12 *be contacted. The District further reserves the right to contact others with whom*
 13 *a vendor has conducted business, in addition to those listed as references, in*
 14 *determining whether a vendor is the lowest responsible bidder. Additional*
 15 *information and/or inquiries into a vendor's skill, ability, and integrity are set*
 16 *forth in the bid specifications.*

Cooperative Purchasing

20 The District may enter into cooperative purchasing contracts with one or more districts for
 21 procurement of supplies or services. A district participating in a cooperative purchasing group
 22 may purchase supplies and services through the group without complying with the provisions of
 23 20-9-204(3), MCA if the cooperative purchasing group has a publicly available master list of
 24 items available with pricing included and provides an opportunity at least twice yearly for any
 25 vendor, including a Montana vendor, to compete, based on a lowest responsible bidder standard,
 26 for inclusion of the vendor's supplies and services on the cooperative purchasing group's master
 27 list.

31		
32	Legal Reference:	§§ 18-1-101, et seq., MCA Preferences and General Matters
33		§§ 18-1-201, et seq., MCA Bid Security
34		§ 18-4-307, MCA Cancellation of invitations for bids or
35		requests for proposals
36		§ 20-9-204, MCA Conflicts of interests, letting contracts, and
37		calling for bids - exceptions
38		§ 20-10-110, MCA School Bus Purchases – contracts- bids
39		<i>Debcon v. City of Glasgow</i> , 305 Mont. 391 (2001)
40	§ 18-4-121, et seq., MCA	Montana Procurement Act
41	§ 18-4-303, MCA	Competitive Sealed Bidding
42	§ 18-4-306, MCA	Sole Source Procurement--records
43	2.5.604, ARM	Sole Source Procurement

1		
2	Legal Reference:	§§ 18-1-101, et seq., MCA Preferences and General Matters
3		§§ 18-1-201, et seq., MCA Bid Security
4		§ 20-9-204, MCA Conflicts of interests, letting contracts, and
5		calling for bids - exceptions
6		§ 20-10-110, MCA School Bus Purchases – contracts- bids
7		<i>Debcon v. City of Glasgow</i> , 305 Mont. 391 (2001)
8		§ 18-4-121, et seq., MCA Montana Procurement Act
9		§ 18-4-303, MCA Competitive Sealed Bidding
10		§ 18-4-306, MCA Sole Source Procurement--records
11		2.5.604, ARM Sole Source Procurement
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1 Gallatin Gateway Elementary

2 Adopted on:
4 Reviewed on:
5 Revised on:

5 7330

FINANCIAL MANAGEMENT

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11 Payroll Procedures/Schedules

14 The District will establish one (1) or more days in each month as fixed paydays for payment of
15 wages in accord with the current collective bargaining agreement or District practice. Employees
16 may choose to have their salaries paid in full upon the last pay date following completion of their
17 assignments or may annualize their pay. Employees who choose to receive payment of wages
18 beyond the period in which the wages were earned (deferred payment) will be subject to Internal
19 Revenue Service (IRS) penalties, unless they provide a written election of such deferral prior to
20 (the first (1st) duty day) (July 1)¹ of the year of deferral. Forms for such deferral shall be made
21 available. Any change to the election must be made prior to the first (1st) duty day of the fiscal
22 year of the deferment.

23 When a District employee quits, is laid off, or is discharged, wages owed will be paid on the next
24 regular payday for the pay period in which the employee left employment or within fifteen (15)
25 days, whichever occurs first.

26
27
28
29 Cross Reference: 5500 Payment of Wages upon Termination

30
31 Legal Reference: § 409A, Internal Revenue Code, Deferred Compensation
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1 Gallatin Gateway Elementary

2 Adopted on:
Reviewed on: 6/26/17

3 7332

4 FINANCIAL MANAGEMENT

5 Revised on: 6/27/2018

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7 Page 1 of 2

8
9 Advertising in Schools/Revenue Enhancement

10
11 Revenue enhancement through a variety of District-wide and District-approved marketing
12 activities, including but not limited to advertising, corporate sponsorship, signage in or on
13 District facilities, is a Board-approved venture. The Board may approve such opportunities
14 subject to certain restrictions in keeping with the community standards of good taste.

15 Advertising will model and promote positive values for District students through proactive
16 educational messages and not be simply traditional advertising of a product. Preferred
17 advertising includes messages encouraging student achievement and establishment of high
18 standards of personal conduct.

19
20 All sponsorship contracts will allow the District to terminate the contract on at least an annual
21 basis, if it is determined that it will have an adverse impact on implementation of curriculum or
22 the educational experience of students.

23
24 The revenue derived should:

- 25
26 • Enhance student achievement;
27 • Assist in maintenance of existing District athletic and activity programs; and
28 • Provide scholarships for students participating in athletic, academic, and activity
29 programs, who demonstrate financial need and merit.

30
31 Appropriate opportunities for marketing activities include but are not limited to:

- 32
33 1. Fixed signage.
34 2. Banners.
35 3. District-level publications.
36 4. Television and radio broadcasts.
37 5. Athletic facilities, including stadiums, high school baseball fields, and high school
38 gymnasiums.
39 6. District-level projects.
40 7. Expanded usage of facilities beyond traditional uses (i.e., concerts, rallies, etc.).
41 8. The interior and exterior of a limited number of District buses, if the advertising is
42 associated with student art selected by the District. The only advertising information
43 allowed will note sponsorship of the student art by the participant. Maintenance for these
44 buses will include but not exceed normal maintenance costs.
45 9. Individual school publications (when not in conflict with current contracts).

Advertising will not be allowed in classrooms, other than corporate-sponsored curriculum materials approved subject to Board policy.

The following restrictions will be in place when seeking revenue enhancement. Revenue enhancement activities will not:

1. Promote hostility, disorder, or violence;
2. Attack ethnic, racial, or religious groups;
3. Discriminate, demean, harass, or ridicule any person or group of persons on the basis of gender;
4. Be libelous;
5. Inhibit the functioning of the school and/or District;
6. Promote, favor, or oppose the candidacy of any candidate for election, adoption of any bond/budget issues, or any public question submitted at any general, county, municipal, or school election;
7. Be obscene or pornographic, as defined by prevailing community standards throughout the District;
8. Promote the use of drugs, alcohol, tobacco, firearms, or certain products that create community concerns;
9. Promote any religious or political organization;
10. Use any District or school logo without prior approval.

Cross Reference: 2120 Curriculum Development and Assessment
2309 Library Materials
2311 Instructional Materials

1 Gallatin Gateway Elementary

2 Adopted on:
4 Reviewed on: 6/26/17

5 7336

FINANCIAL MANAGEMENT

Revised on:

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10 Travel Allowances and Expenses

11
12 The District will reimburse employees and trustees for travel expenses while traveling outside
13 the District and engaged in official District business. District employees who are not exempted
14 by another policy will be reimbursed according to the current state levels pursuant to Montana
15 law. All travel expenses must be reported on the established travel expense and approved by the
16 employee’s supervisor and the Superintendent.

17
18 The District business office is responsible for development of procedures and forms to be used in
19 connection with travel expense claims and reimbursements.

20
21 Personal Reimbursements

22
23 While it is recommended that all purchases of goods or services be made within established
24 purchasing procedures, there may be an occasional need for an employee to make a purchase for
25 the benefit of the District from personal funds. In that event, an employee will be reimbursed for
26 a personal purchase under the following criteria:

- 27 1. It is clearly demonstrated that the purchase is of benefit to the District;
- 28 2. The purchase was made with the prior approval of an authorized administrator;
- 29 3. The item purchased was not available from District resources; and
- 30 4. The claim for personal reimbursement is properly accounted for and documented with an
31 invoice or receipt.

32
33
34 The District business office is responsible for developing procedures and forms to be used in
35 processing claims for personal reimbursements.

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40

41 Legal Reference:	§ 2-18-501, MCA	Meals, lodging, and transportation of persons in
		state service
	§ 2-18-502, MCA	Computation of meal allowance
	§ 2-18-503, MCA	Mileage – allowance
	IRS.gov	

1 Gallatin Gateway Elementary

2 Adopted on:
3 Reviewed on:
4 Revised on:

5 7405

6 FINANCIAL MANAGEMENT

7 Procurement Card Use

8 The Board of Trustees permits the use of procurement cards for actual and necessary expenses
9 incurred in the performance of work-related duties for the District. A list of those individuals that
10 will be issued a District procurement card will be maintained in the business office and reported
11 to the Board each year at its meeting in June.

12 The District has procurement cards, with a District limit not to exceed \$30,000 per month on an
13 average.

14 Procurement cards may only be used for legitimate District business expenditures. The use of
15 procurement cards is not intended to circumvent the District’s policy on purchasing.

16 Users must take proper care of District credit cards and take all reasonable precautions against
17 damage, loss, or theft. Any damage, loss, or theft must immediately be reported to the business
18 office and to the appropriate financial institution. Failure to take proper care of credit cards or
19 failure to report damage, loss, or theft may subject the employee to financial liability.

20 Purchases that are unauthorized, illegal, represent a conflict of interest, are personal in nature, or
21 violate the intent of this policy may result in procurement card revocation and discipline of the
22 employee.

23 Users must submit detailed documentation, including itemized receipts for commodities,
24 services, travel, and/or other actual and necessary expenses which have been incurred in
25 connection with school-related business for which the procurement card has been used.

26 The Superintendent shall establish regulations governing the issuance and use of procurement
27 cards. Each cardholder shall be apprised of the procedures governing the use of the procurement
28 card, and a copy of this policy and accompanying regulations shall be given to each cardholder.

29 The District Clerk shall monitor the use of each procurement card every month and report any
30 serious problems and/or discrepancies directly to the Superintendent and the Board.

31 Cross Reference: 7320 Purchasing
32 7335 Personal Reimbursement
33 7336 Travel Allowances and Expenses

34 Legal Reference: §2-7-503, MCA Financial reports and audits of local government
35 entities

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Gallatin Gateway Elementary

Adopted on: 08/20/12 Reviewed on:
6/26/17

7425

FINANCIAL MANAGEMENT

Revised on:

Extra- and Co-Curricular Funds

The Board is responsible for establishment and management of student extra- and co-curricular funds. The purpose of student extra- and co-curricular funds is to account for revenues and disbursements of those funds raised by students through recognized student body organizations and activities. The funds shall be deposited and expended by check, in a bank account maintained by the District for student extra- and co-curricular funds. The use of the student extra- and co-curricular funds is limited to the benefit of the students.

The Board shall follow the *Student Activity Fund Accounting* (published by the Montana Association of School Business Officials (MASBO)) in establishing accounting procedures for administration of student extra- and co-curricular funds and will appoint a fund administrator.

Specific procedures are available in the Clerk's office.

Legal Reference:	§ 2-7-503, MCA	Financial reports and audits of local government entities
	§ 20-9-504, MCA	Extracurricular fund for pupil functions

1 Gallatin Gateway Elementary

2 Adopted on: 10/21/20

3 7425F

3 FINANCIAL MANAGEMENT

3 Reviewed on:

4 Class Fundraising Notice

8 The class of _____ is raising funds for their class operations, projects, and trips. The school district is
9 sponsoring that effort through coordination of donations and the sale of goods, with the portion of the
10 sales price above cost being treated as a donation. In order to ensure that your contribution to this effort
11 is spent as intended and to provide you with information regarding how the funds will be spent, please
12 know:
13
14

- 15 1. The funds raised through donations will be public funds in accordance with Policy 7260 and
16 Section 20-6-604, MCA. The funds will be deposited in the class’s account as part of the School
17 District’s Extra- and Curricular Fund procedure outlined in Policy 7425 and Section 20-9-504,
18 MCA. Funds will be spent in accordance with the authority of the Board of Trustees.
- 19 2. Class operations and projects that will be funded through these fundraising efforts include
20 decorating and hosting class events that include but are not limited to the commencement
21 ceremony, dances and prom, awards ceremonies, and graduation gatherings. Other projects may
22 include but are not limited to class memorials, school spirit campaigns, parade floats, or support
23 for class service projects in the community. Excess funds may be donated to another class in the
24 district to help support events or projects in accordance with this form, School District policy and
25 Montana law.
- 26 3. Class trips supported through this fundraising effort will include but are not limited to a school
27 sponsored educationally focused senior trip for the class of _____ as approved by the Board of
28 Trustees in accordance with Policy 2320. The trip is currently planned for
29 _____ (insert description of the trip if one has been identified, or, if the details
30 have not been mapped out, “a senior trip, the details of which have not yet been finalized and
31 which will depend on the amount of funds raised.”
- 32 4. There are events, unanticipated at this time, that could render the planned senior trip infeasible,
33 inadvisable, commercially impracticable, illegal, or impossible. Illustrative examples include but
34 are not limited to terrorism or threats of terrorism, a pandemic, weather events, other acts of God,
35 or any other unforeseen event beyond the control of the school district.
- 36 5. If the school board determines that the primary purpose for this fundraising effort meets one or
37 more of the contingencies in (4) above, the funds donated will used for one or more of the
38 following purposes authorized in or consistent with (2) above. Funds will not be used for cash
39 payments or other gifts to students.
- 40 6. By donated funds and/or purchasing goods for the purpose of fundraising, those contributing to
41 this fundraising effort acknowledge that their contribution will be treated as including the donor’s
42 direction to spend the funds according to the conditions specified in paragraphs 1 through 5
43 above, with the school board directed to exercise its full discretion regarding these matters in
44 determining the best use of contributed funds consistent with any of the purposes specified above.
45

1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 7430

4 FINANCIAL MANAGEMENT

5 Reviewed on:

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12 Financial Reporting and Audits

13
14 The Board directs that financial reports of all District funds be prepared in compliance with
15 statutory provisions and generally accepted accounting and financial reporting standards. In
16 addition to reports required for local, state, and federal agencies, financial reports will be
17 prepared monthly and annually and presented to the Board. Financial reports shall reflect
18 financial activity and status of District funds.

19
20 Appropriate interim financial statements and reports of financial position, operating results, and
21 other pertinent information will be prepared to facilitate management and control of financial
22 operations.

23
24 The Board directs that District audits be conducted in accordance with Montana law. Each audit
25 shall be a comprehensive audit of the affairs of the District and District funds. The audits shall
26 comply with all statutory provisions and generally accepted governmental auditing standards.
27 Each audit may be made every year and cover the immediately preceding fiscal year.

31	Legal Reference:	§§ 2-7-501, et seq., MCA	Audits of Political Subdivisions
32		§ 2-7-503, MCA	Financial Reports and Audits of local
33			government entities
34		§ 20-9-212, MCA	Duties of county treasurer
35		§ 20-9-213, MCA	Duties of trustees
36			
37			

1 Gallatin Gateway Elementary

2 Adopted on: 08/20/12

3 7500

4 FINANCIAL MANAGEMENT

5 Reviewed on:

8 Property Records

9
10 Property and inventory records will be maintained for all land, buildings, and physical property
11 under District control and will be updated annually.

12
13 For purposes of this policy, “equipment” means a unit of furniture or furnishings, an instrument,
14 a machine, an apparatus or a set of articles which retains its shape and appearance with use, is
15 nonexpendable, and does not lose its identity when incorporated into a more complex unit. The
16 Superintendent will ensure inventories of equipment are systematically and accurately recorded
17 and updated annually. Property records of facilities and other fixed assets will be maintained on
18 an ongoing basis. No equipment will be removed for personal or non-school use except in
19 accordance with Board policy.

20
21 Property records will show, appropriate to the item recorded, the:

- 22
23 1. Description and identification
24 2. Manufacturer
25 3. Date of purchase
26 4. Initial cost
27 5. Location
28 6. Serial number, if available
29 7. Model number, if available

30
31 Equipment may be identified with a permanent tag providing appropriate District and equipment
32 identification.

33
34
35
36 Cross Reference: 7510 Capitalization Policy for Fixed Assets

37
38 Legal Reference: § 20-6-602, MCA Trustees’ power over property
39 § 20-6-608, MCA Authority and duty of trustees to insure district
40 property

1 Gallatin Gateway Elementary

2 Adopted on:
3 Reviewed on: 6/26/17
4 Revised on:

5 7510 FINANCIAL MANAGEMENT
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8 Capitalization Policy for Fixed Assets

9 A fixed asset is a property that meets all the following requirements:

- 10 1. Must be tangible in nature;
- 11 2. Must have a useful life of longer than the current fiscal year; and
- 12 3. Must be of significant value.

13 Fixed assets may be acquired through donation, purchase, or may be self-constructed. The asset
14 value for a donation will be the fair market value at the time of donation. The asset value for
15 purchases will be the initial cost plus the trade-in value of any old asset given up, plus all costs
16 related to placing the asset into operation. The cost of self-constructed assets will include both
17 the cost of materials used and the cost of labor involved in construction of the asset.

18 The following significant values will be used for different classes of assets:

<u>Class of Fixed Asset</u>	<u>Significant Value</u>
Equipment and machinery	\$5000.00 or more
Buildings - improvements	\$5000.00 or more
Improvements other than to buildings	\$5000.00 or more
Land	Any amount

19 Cross Reference: 7500 Property Records
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Gallatin Gateway Elementary

Adopted on: 08/20/12

Reviewed on: 6/26/17

Revised on:

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FINANCIAL MANAGEMENT

Page 1 of 2

Fund Balances

I. PURPOSE

The fund balance policy establishes a framework for the management of all excess funds managed by the Gallatin Gateway Elementary School District. The policy is in accordance with GASB Statement 54; management of fund balance. It also provides guidance and direction for elected and appointed officials as well as staff in the use of excess funds at year-end.

II. SCOPE

This fund balance policy applies to all funds in the custody of the School District Business Manager/Clerk of the Gallatin Gateway Elementary School District, Gallatin Gateway, Montana. These funds are accounted for in the District's annual audited financial reports and include, but are not limited to, the following:

- General Fund
- Special Revenue Funds
- Capital Project Funds
- Enterprise Funds
- Any new funds created by the District, unless specifically exempted by the governing body; in accordance with state law or GASB pronouncements.

III. CLASSIFICATION OF FUND BALANCES

The school district shall classify its fund balances in its various funds in one or more of the following five classifications: nonspendable, restricted, committed, assigned, and unassigned.

IV. DEFINITIONS

A. *Fund balance*---means the arithmetic difference between the assets and liabilities reported in a school district fund.

B. *Committed fund balance*—amounts constrained to specific purposes by the District itself, using its highest level of decision-making authority; to be reported as committed, amounts cannot be used for any other purpose unless the District takes the same highest-level action to remove or change the constraint

C. *Assigned fund balance*—amounts a school district *intends* to use for a specific purpose; intent can be expressed by the District or by an official to which the Board of Trustees delegates the authority

D. *Nonspendable fund balance*—amounts that are not in a spendable form (such as inventory) or are required to be maintained intact (such as the corpus of an endowment fund)

4 E. *Restricted fund balance*—amounts constrained to specific purposes by their providers (such
5 as grantors, bondholders, and higher levels of government), through constitutional
6 provisions, or by enabling legislation

8 F. *Unassigned fund balance*—amounts that are available for any purpose; these amounts are
9 reported only in the general fund.

10 **V. MINIMUM FUND BALANCE**

11 The school district will strive to maintain a minimum unassigned general fund balance of 10% of the
12 District’s general fund operating expenditures. If the fund balance drops below 10% the Superintendent
13 shall promptly notify the Board of Trustees to take additional action.
14

15 **VI. ORDER OF RESOURCE USE**

16 If resources from more than one fund balance classification could be spent, the school district will strive
17 to spend resources from fund balance classifications in the following order (first to last): restricted,
18 committed, assigned, and unassigned.
19

20 **VII. COMMITTING FUND BALANCE**

21 A majority vote of the school board is required to commit a fund balance to a specific purpose and
22 subsequently to remove or change any constraint so adopted by the board.
23

24 **VIII. ASSIGNING FUND BALANCE**

25 The school board, by majority vote, may assign fund balances to be used for specific purposes when
26 appropriate. The board also delegates the power to assign fund balances to the Superintendent of the
27 District.
28

29 Assignments so made shall be reported to the school board on a monthly basis, either separately or as part
30 of ongoing reporting by the assigning party if other than the school board.
31

32 An appropriation of an existing fund balance to eliminate a projected budgetary deficit in the subsequent
33 year’s budget in an amount no greater than the projected excess of expected expenditures over expected
34 revenues satisfies the criteria to be classified as an assignment of fund balance.
35

36 **IX. REVIEW**

37 The school board will conduct, at a minimum, an annual review of the sufficiency of the minimum
38 unassigned general fund balance level.
39

40 ***Legal References:*** Statement No. 54 of the Governmental Accounting Standards Board
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1 Gallatin Gateway Elementary

2 Adopted on:

3 Reviewed on: 6/26/17

4 7520

5 FINANCIAL MANAGEMENT

6 Revised on: 3/11/20

7 Independent Investment Accounts

8

9 The Board may establish independent investment accounts separate and apart from those funds

10 maintained by the county treasurer. The Board may transfer cash into an independent investment

11 account from any budgeted or non-budgeted funds. A separate account shall be established for

12 each fund from which transfers are made. The principal and any interest earned must be

13 reallocated to the fund from which the deposit was originally made. Unless otherwise provided

14 by law, all other revenue may be sent directly to a participating district’s investment account.

15 The District may either:

- 16
- 17
- 18 • Establish and use the account as a non-spending account, returning sufficient funds to the
 - 19 county treasurer in time to pay all claims against the applicable fund; or

 - 21 • Establish a subsidiary checking account and make expenditures from the investment
 - 22 account, provided all transactions are accounted for and reported, as required by
 - 23 applicable accounting principles. If the District desires to establish a subsidiary checking
 - 24 account for purposes of paying for expenditures directly from an investment account, the
 - 25 District must enter into a written agreement with the county treasurer, in accordance with
 - 26 § 20-9-235, MCA.

27

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29 Legal Reference: § 20-9-235, MCA Authorization for school district investment account

1 Gallatin Gateway Elementary

3 Adopted on: 6/26/17

4 Reviewed on:

5 7525

FINANCIAL MANAGEMENT

Revised on:

10 Lease-Purchase Agreement

11 The trustees of a district can lease property with an option to purchase.

12 Personal property -- the lease cannot be more than seven (7) years.

13 Real property -- the lease cannot be more than fifteen (15) years.

14 The terms of the lease must comply with 20-6-625, MCA. If real property is acquired, the
15 trustees shall comply with 20-6-603, MCA.

16 The trustees of any district may lease buildings or land suitable for school purposes when it is
17 within the best interests of the district to lease the buildings or land from the county,
18 municipality, another district, or any person. The term of the lease may not be for more than
19 fifteen (15) years unless prior approval of the qualified electors of the district is obtained in the
20 manner prescribed by lase for school elections, in which case the lease may be for a term
21 approved by the qualified electors, but not exceeding ninety-nine (99) years. Whenever the lease
22 is for a period of time that is longer than the current school fiscal year, the lease requirements for
23 the succeeding school fiscal years shall be an obligation of the final budgets for such years.

24 Cross Reference: Policy 7251 Disposal of school district property without
25 a vote.

26 Legal Reference: § 20-6-603, MCA Trustees' authority to acquire or dispose of
27 sites and buildings – when election required.
28 § 20-6-609, MCA Trustees' authority to acquire property by
29 lease-purchase agreement.
30 § 20-6-625, MCA Authorization to lease buildings or land for
31 school purposes.

1 Gallatin Gateway Elementary

2 Adopted on: 6/26/17

3 Reviewed on:

4 7535

5 FINANCIAL MANAGEMENT

6 Revised on:

8 Electronic Signatures

9 11 “Electronic signature” means an electronic sound, symbol, or process attached to or logically
10 12 associated with a record and executed or adopted by a person with the intent to sign the record.

13
14 Electronic signatures or digital signatures can take many forms and can be created using many
15 different types of technology. For the purpose of this policy an electronic signature means any
16 electronic identifier intended by the person using it to have the same force and effect as a manual
17 signature.

18 District Use of Electronic Signatures

19
20
21 When not practical or possible to have an approved individual physically sign a document, and
22 not otherwise prohibited by applicable laws, electronic signatures may satisfy the requirement of
23 a written signature when transacting business with and/or for the District and/or with
24 parents/guardians when the authenticity and reliability of such electronic signature(s) meets the
25 provisions of this policy. In such instances, the electronic signature shall have the full force and
26 effect of a manual signature.

27
28 In order to qualify for acceptance of an electronic signature the following additional
29 requirements are applicable:

- 30
31 1. The electronic signature identifies the individual signing the document by his/her
32 name and title;
33 2. The identity of the individual signing the document with an electronic signature is
34 capable of being validated through the use of an audit trail;
35 3. The electronic signature, as well as the documents to which it is affixed, cannot be
36 altered once the electronic signature is affixed. If the document needs to be
37 altered, a new electronic signature must be obtained; and
38 4. The electronic signature conforms to all other provisions of this policy.

39
40 The District shall maintain District electronically signed records in a manner consistent with the
41 District’s document retention policies yet also capable of accurate and complete reproduction of
42 the electronic records and signatures in their original form. Such retention should include a
43 process whereby the District can verify the attribution of a signature to a specific individual,
44 detect changes or errors in the information contained in the record submitted electronically and
45 protect and prevent access and/or manipulation or use access/use by an unauthorized person.

The District shall maintain a hardcopy of the actual signature of any District employee authorized to provide an electronic signature in connection with school board business.

Abuse of the electronic signature protocols by any District employee serves as grounds for disciplinary action up to and including termination.

Parent/Student Use of Electronic Signatures

With regard to documentation received by the District with an electronic signature from a parent/legal guardian, so long as the following provisions are met, the District may receive and accept such electronic signature as an original document:

1. Such communication with signature, of its face, appears to be authentic and unique to the person using such signature;
2. The District is unaware of any specific individualized reason to believe that the signature has been forged;
3. The District is unaware of any specific reason to believe the document has been altered subsequent to the electronic signature; and
4. The signature is capable of verification.

The District's Superintendent or designee may, at his or her discretion, request that an original of the electronic communication, signed manually by hand, be forwarded to the District in a timely manner.

District personnel may periodically audit the authenticity of such signature via a security procedure including such acts as making follow-up inquiry to the individual/entity who has submitted such electronic signature.

Should it be discovered that a student has falsified a parent's electronic signature on an official District document, the student may be subjected to discipline and the Administrators of the District are authorized, at their discretion, to thereafter only accept manual signatures associated with any submitted school document.

Legal Reference:	30-18-102(9), MCA	Definitions
	30-18-106(4), MCA	Legal recognition of electronic records, electronic signatures, and electronic contracts
	42.8.106, ARM	Electronic submission of documents and electronic signatures

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Gallatin Gateway Elementary

Adopted on: 4/20/22
Reviewed on:

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7625

FINANCIAL MANAGEMENT

Revised on:

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Use of Enhanced Tax Credit Receipts

10 On receiving a donation from an enhanced tax credit, the District shall seek
11 preapproval, in a
12 manner prescribed by the Department of Revenue (DOR), that the amount of tax
13 credit sought by
14 the taxpayer is available under the aggregate limit set in statute. Upon preapproval
15 by the DOR,
16 the District shall issue a receipt, in a form prescribed by the DOR, to each
17 contributing taxpayer
18 indicating the value of the donation received and documenting the preapproval of
19 the credit.

15

16 The District shall use the funds received from an enhanced tax credit for
17 innovative educational
18 programs specified in law which are defined as:
19 (a) transformational learning as defined in Section 20-7-1602, MCA;
20 (b) advanced opportunity as defined in Section 20-7-1503, MCA;
21 (c) any program, service, instructional methodology, or adaptive equipment
22 used to expand
23 opportunity for a child with a disability as defined in Section 20-7-401,
24 MCA;
25 (d) any courses provided through work-based learning partnerships or for
26 postsecondary
27 credit or career certification under Policy 2600; and
28 (e) technology enhancements, including but not limited to any expenditure
29 incurred for
30 purposes specified in Section 20-9-533, MCA.

26

27 Legal Reference: Title 15, Chapter 30, Part 31, MCA- Tax Credit for Qualified
28 Education

28

Contributions

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