



# Montana Transformational Learning Grant: Phase II

## Executive Summary

The Montana Transformational Learning Phase II Grant builds upon the foundation established in Phase I, continuing the state's commitment to student-centered, proficiency-based systems that prepare learners for success in post-secondary pathways.

Phase II is designed to deepen, scale, and institutionalize progress already demonstrated by participating districts. The focus is no longer on piloting innovation, but on embedding sustainable, system-wide change that improves student engagement, achievement, and opportunities.

## Purpose of Phase II

The purpose of this grant, per HB 573, is to further develop the efforts of the most innovative transformational learning grantees toward district-wide implementation of transformational and proficiency-based learning, and to use the knowledge gained by Phase II grantees to develop recommendations and guidance for other districts interested in innovating in a similar manner.

Phase II supports districts that have already begun implementing transformational practices and are ready to:

- Scale proficiency-based learning systems, district-wide
- Expand flexible student pathways
- Strengthen career-connected and work-based learning
- Institutionalize student voice and authentic demonstrations of learning
- Align governance, policy, and instructional systems
- Serve as “lighthouse” districts throughout the state
- Provide guidance and recommendations for future legislative action

The intent is long-term systems change, not isolated innovation.

## Competitive Application Process

The Phase II application process was structured as a competitive continuation opportunity for current and previous Transformational Learning grantees.

Districts applied through a formal process administered by OPI and were required to:

- Describe specific strategies or initiatives your district has implemented.
- Include data or evidence where possible (e.g., participation rates, pilot programs, student outcomes, stakeholder engagement).

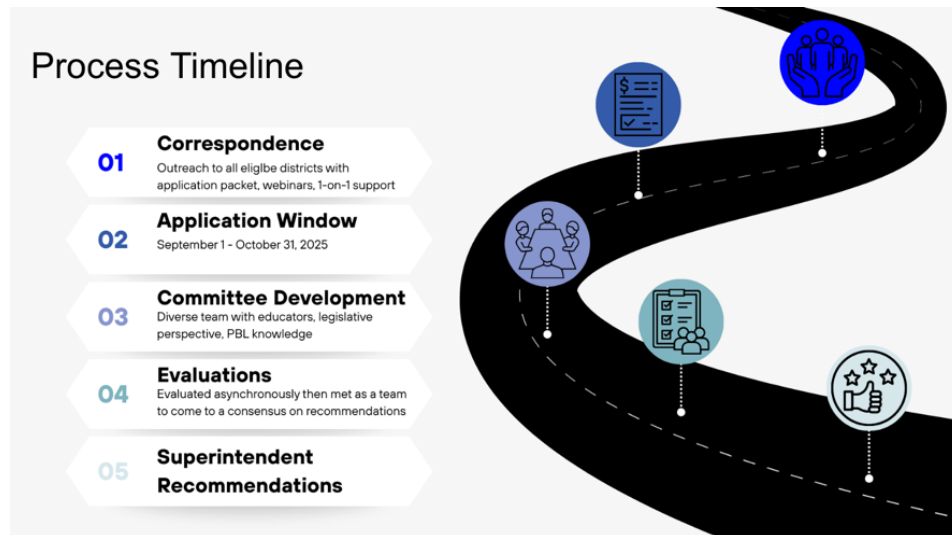
- Describe key activities, goals, and timelines for Phase II.
- Explain how staff, students, families, and the community will be engaged.
- Provide estimated costs for each major activity.
- Agree to district assurances as a participant of the Phase II cohort.
- Superintendent and school board signatures

## Review Criteria Prioritized

Applications were evaluated based on:

- Evidence of impact from previous transformational learning funding
- Description of continued progress
- Cost estimates & budget
- District assurances and documentation
- Clarity & completeness
- Variety of applications and school sizes

The review process emphasized accountability, coherence, and the impact of duplication.

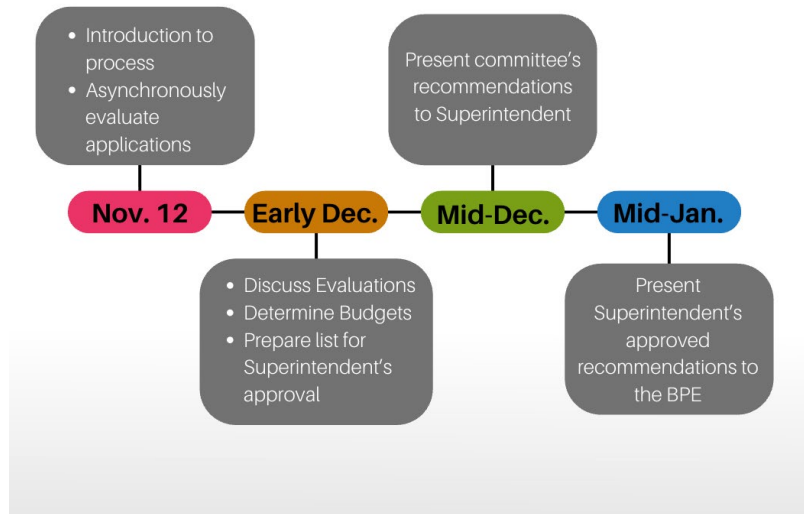


## Overview of Transformational Learning Committee Work

Committee Members:

- Heather Jarrett - Reed Point School District, Superintendent
- Hailey Hancock - Montana State University, Assistant Teaching Professor
- Meg Parry - Learner-centered Collaborative, Director of Strategic Partners
- Katie Bloodgood - MT Office of Public Instruction, Deputy Chief of Staff & Policy Director
- Krystal Smith - MT Office of Public Instruction, Transformational Learning Grant Manager

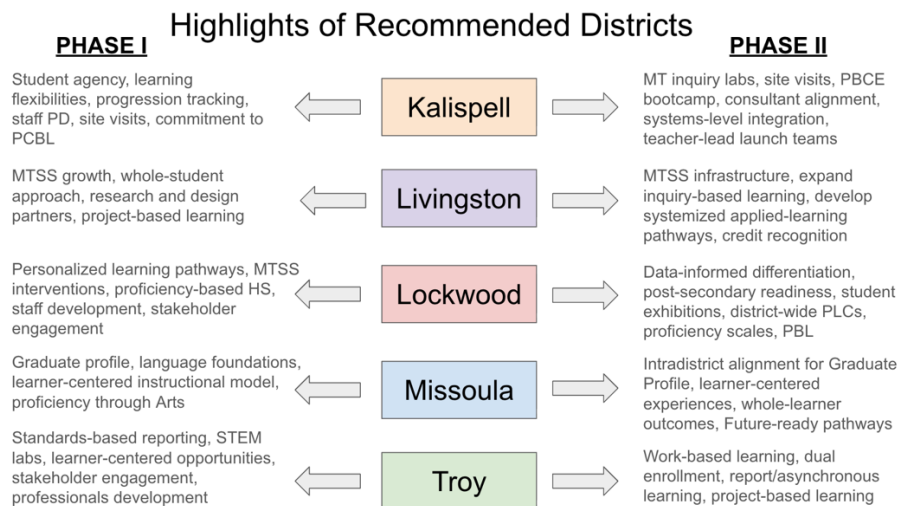
Timeline for Committee’s Work:



**Awarded Districts & Funding Levels**

Following a competitive review by the committee, five districts were recommended to the State Superintendent for Phase II funding. Rubric scores, varying scalable models, and the size of districts impacted those recommended, as well as the award amounts. These districts were recommended by the State Superintendent to the Board of Public Education during their January 2026 meeting and unanimously approved.

1. Kalispell Public Schools: \$709,221.94
2. Livingston Public Schools: \$500,000.00
3. Lockwood Public School: \$322,500.00
4. Missoula County Public Schools: \$697,509.06
5. Troy Public Schools: \$78,000.00



## **OPI Oversight & Technical Assistance**

Recognizing that systems transformation requires sustained support, OPI is in the process of issuing an RFP for Technical Assistance. Additionally, a full cohort meeting and individual 1-on-1 meetings with districts have occurred. Moving forward, and after securing a technical assistance provider, the cohort, along with the provider and the OPI will collaborate in a variety of convenings. The emphasis is on coherence, alignment, and sustainability—not dependency on grant funding. These convenings include virtual, in-person, and site visits focused on the following topics:

- **Statewide Convenings:** in-person and virtual learning sessions, structured cross-district collaboration, spotlighting of promising practices
- **Professional Learning:** proficiency-based systems alignment, assessment literacy and performance-based demonstrations of learning, change management, and leadership development
- **Supportive Partnerships:** engagement with organizations experienced in transformational and competency-based learning, targeted coaching based on district needs
- **Sustainability & Long-Term Impact:** reallocation of district resources, flexibilities and variances, rethinking education models, embedded professional development structures

## **Future Reporting**

One identified outcome of Phase II is to develop a roadmap for learner-centered design, as described in the current School Funding Commission report titled “Innovation and Excellence and Education Working Group Report.” As stated on pages 54-55 of the report, “To that end, the roadmap should provide school boards, administrators, and teachers with the knowledge necessary to guide each of their efforts and accelerate their implementation of learner-centered models. The roadmap should achieve several aims:

1. Provide a structure for the collection of promising practices that other districts can emulate.
2. Provide districts with guidance and support in developing their own phased implementation of student-centered policies, encompassing everything from school board policy to teacher and student handbooks.
3. The roadmap should include guidance on strategies to utilize professional development time differently – not to add to the total professional learning burden.”

The Transformational Learning Phase II grants provide a natural testbed for developing this roadmap and looks forward to leading the state of Montana in implementing district-wide proficiency-based learning. Over the next two years, the cohort will gather data and evidence to drive guidance and recommendations for other districts, reporting back to the committee before September 2028 with a detailed description of how each district furthered its progress towards district-wide transformational and proficiency-based learning.