



School Funding Interim Commission

69th Montana Legislature

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TO: School Funding Interim Commission (SFIC)
FROM: Pad McCracken, Commission Staff
RE: Phase II planning and possible consultant
DATE: December 10, 2025

Two previous memos and a presentation have provided background on how the Commission might approach its Phase II work and specifically the Commission's duty under 5-20-301 (1)(a), MCA, to "conduct a study to reassess the educational needs and costs related to the basic system of free quality public elementary and secondary schools". It may be valuable to review the following:

- August 14, 2025, presentation on cost studies by Mike Griffith with the Learning Policy Institute [slides](#) (see slides 14-22) and [video](#) (presentation begins at 14:28:30)
- September 12, 2025, [memo](#) "Cost study considerations and possibilities"
- October 9, 2025, [memo](#) "Phase II planning and possible consultant"

Based on Commission direction at the October meeting, a request for information (RFI) was issued seeking information on:

an individual or organization to act as an advising consultant to the School Funding Interim Commission and Commission staff in conducting a limited cost study of the basic system of elementary and secondary schools using the "successful schools" methodology and to serve as a resource for the Commission's examination of various school funding topics between January 1, 2026, and September 1, 2026.

The RFI was open from November 5 – 20, 2025, and resulted in responses from four organizations with experience in conducting school funding cost studies:

1. [APA Consulting](#)
2. [Afton Partners](#)
3. [American Institutes for Research \(AIR\)](#)
4. [WestEd](#)

It's worth acknowledging that the request to act as an "advising consultant" supporting legislative staff in conducting a cost study is not the norm. It is more typical for these organizations to conduct the study entirely. This may have been misunderstood in the RFI and perhaps contributed to the estimated basic study costs among the four respondents ranging from \$60,000 to \$250,000 and the costs of more robust options ranging from \$125,00 to \$500,000.

All of the responses mention the very aggressive time frame for the work, but all provided a basic order of operations:

1. Work with the Commission to determine the definition and metrics for a successful school/district
2. Ensure availability of necessary achievement, demographic, and financial data
3. Identify successful schools/districts
4. Analyze spending levels and expenditure patterns in successful and unsuccessful schools/districts, paying particular attention to any that “beat the odds” (meaning that they cultivate exceptional achievement among all subgroups of students)
5. Based on this analysis, model funding needs to provide resources allowing all schools to meet achievement goals and/or provide recommendations for expenditures that would support all schools meeting achievement goals

As previous memos have communicated, how to approach the Commission’s duty to conduct a cost study is entirely the Commission’s decision. You are basically at a fork in the road, and it is time to pick either:

Route 1. Conduct a cost study based on the successful schools/districts approach and proceed immediately with procuring an experienced consultant to guide the Commission and staff; or

Route 2. Not conduct a cost study using one of the generally accepted methodologies and instead perform an analysis in some other manner of the Commission’s design and within staff capacity.

A possible timeline for Route 1:

SFIC decision	Dec 15
Post RFP	Dec 17
Close RFP	Jan 8
Evaluation/selection (LSD and LFD staff)	by Jan 23
Execute contract	by Feb 1

I am attaching a draft document that includes several components that an RFP for this advising consultant would contain, including a scope of work and cost proposal. Note that the funding available to support this contract has been increased from \$60,000 to \$110,000. Legislative Fiscal Analyst Amy Carlson received approval from her Management Advisory Workgroup to supplement SFIC funds with up to \$50,000 of Legislative Fiscal Division carryforward authority and will be available for questions when this topic is discussed during your December 15 meeting.

Because the potential contract amount exceeds \$100,000, this procurement will need to be through a regular request for proposal (RFP) process and not a limited solicitation. The Legislative Branch’s delegation agreement with the Department of Administration (DofA) also requires that DofA be in charge of the procurement process. I have requested that DofA be available during your discussion of this topic on December 15 as well.

School Funding Cost Study Advising Consultant Solicitation – DRAFT RFP elements

Note – this DRAFT document was prepared for the School Funding Interim Commission by Pad McCracken, Commission Staff, in December 2025 to provide Commissioners information on components of a potential RFP. The elements and some boilerplate language were provided by the Montana Department of Administration.

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Scope of Services

To enable the State to determine the capabilities of an offeror to perform the services specified in the Request for Proposals (RFP), the offeror shall respond to the following regarding its ability to meet the State’s requirements.

NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.

Mandatory Requirements

To be eligible for consideration, an offeror *shall* meet all mandatory requirements noted herein. The State will determine whether an offeror’s proposal complies with the requirements. Proposals that fail to meet any mandatory requirements listed in this RFP will be deemed nonresponsive.

Introduction

Montana’s School Funding Interim Commission (SFIC) is required to:

- conduct a study to reassess the educational needs and costs related to the basic system of free quality public elementary and secondary schools; and
- if necessary, recommend to the following legislature changes to the state's funding formula.

The 2025-2026 SFIC has decided to conduct a limited cost study, based on the “successful school/district” methodology, largely done “in-house” by staff of the Legislative Fiscal and Services Divisions, but with the close guidance of an expert advising consultant.

The SFIC seeks to contract with an organization or individual to serve as this advising consultant to advise on the design of a limited school funding cost study, support commission staff in conducting the study, provide analysis to the SFIC, and to act as an expert resource for the SFIC’s work through August 2026.

Work needed:

Offerors shall respond with a description of how they will support the Commission and Commission staff for the numbered items below. Responses with more than eight (8) pages will be disqualified from consideration. Responses should include a timeline of key tasks and describe with specific detail your approach to similar work completed related to conducting a successful school/district cost study.

1. Develop a working knowledge of Montana’s basic system of free public elementary and secondary schools, the current school funding formula and recent changes, and the Commission’s statutory duties.
2. Work with the Commission to define what will constitute a “successful school/district”
3. Support Commission staff in identifying and securing all necessary achievement, demographic, and financial data for the study; provide guidance on issues that arise, for example addressing small schools/districts and ensuring that differences in student characteristics between districts inform the study
4. Support Commission staff in analyzing spending levels and expenditure patterns in successful and unsuccessful schools/districts
5. Support Commission staff in modeling funding needs to provide resources allowing all schools to meet achievement goals and/or provide recommendations on district expenditures to support all schools meeting achievement goals
6. Provide updates and analysis at all Commission meetings, with in-person attendance of lead consultant expected at the February and June meetings.
Commission meetings are currently scheduled for:
 - a. February 11-12, 2026
 - b. April 7-8, 2026

- c. June 17-18, 2026
 - d. August 12-13, 2026
7. Consult on a regular basis with Commission staff; availability for bi-weekly calls is expected during the design and conduct of the study
 8. Provide considerations to legislative fiscal staff on the “school funding data dashboard” required under Section 17 of [HB 252](#), and in particular on data measures for the equity of Montana’s school funding formula

Offeror Qualifications

To enable the State to determine the capabilities of an offeror to perform the services specified in the Request for Proposals (RFP), the offeror shall respond to the following regarding its ability to meet the State’s requirements.

NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.

Responses should include a detailed narrative of each response, with no more than two (2) pages of the References and the Company Profile and Experience. Each resume shall not exceed one (1) page per key personnel.

References

Offerors shall provide a minimum of two (2) references that are currently using or have previously used services of the type proposed in this RFP. The references may include state governments or universities for whom the offeror, preferably within the last three (3) years, has successfully completed work similar to that described in the Scope of Services. At a minimum, the offeror shall provide the company name, location where the services were provided, contact person(s), contact telephone number, e-mail address, a complete description of the services provided, and dates of service. These references may be contacted to verify the offeror’s ability to perform the contract. The State reserves the right to use any information or additional references deemed necessary to establish the ability of the offeror to perform the contract. Negative references may be grounds for proposal disqualification.

Company Profile and Experience

Offeror shall provide documentation establishing the individual or company submitting the proposal has the qualifications and experience to provide the services established in this RFP, including, at a minimum:

- a detailed description of any similar past projects, including the service types and dates the services were provided;
- the client for whom the services were provided; and
- a general description of the firm including its primary source of business, organizational structure and size, number of employees, years of experience performing services similar to those described within this RFP.

Resumes

A resume or summary of qualifications, work experience, education, and skills must be provided for all key personnel, including any subcontractors, who will be performing any aspects of the contract. Include years of experience providing services similar to those required; education; and certifications where applicable. Identify what role each person would fulfill in performing work identified in this RFP.

Interviews

Offerors must be prepared to have the key personnel assigned to this project complete an interview online or in-person to be determined at the State's discretion. The State reserves the right to:

1. have interviews from up to five (5) of highest scoring offerors, at the State's discretion;
2. have interviews from five (5) offerors who are deemed to have a passing score prior to the interview process, at the State's discretion.

Offerors selected to participate in the interview will be notified by the State in advance. For planning purposes, the State will submit specific guidance as deemed appropriate to promote productive and efficient interviews.

Offerors will be required to bring certain key personnel to the interviews. The following key staff must be present at a minimum. If the offeror is proposing to have a key staff member filling more than one position, that information must be clearly addressed at the time of the interviews on how staff will produce and perform all of the required functions, activities and deliverables for the combined job duties. Dual accountability, security issues and deadlines cannot be compromised. Offerors are welcome to bring additional staff at their discretion.

- Account Manager
- Lead consultant
- Others may be requested at the State's discretion and upon notification

The State reserves the right to schedule and conduct interviews with Offerors proposed key staff following the oral presentations if in the best interest of the State. The State reserves the right to decline interviews if Offerors are within 50 points of total points possible.

Evaluation Process

The evaluator/evaluation committee will review and evaluate the offers according to the following criteria based on a total number of 1000 points.

The provision of services, company profile and experience, resumes, and interview portions of the proposal will be evaluated based on the following Scoring Guide. The references portion of the proposal will be evaluated on a pass/fail basis, with any offeror receiving a "fail" eliminated from further consideration. The Cost Proposal will be evaluated based on the following formula set forth below.

Achieve Minimum Score for Interviews

Any proposal that fails to achieve 60% of the total available points for the Provision of Services, Company Profile and Experience, and Resumes, will be eliminated from further consideration and will not move to the interview portion. A "fail" for any individual evaluation criteria may result in proposal disqualification at the discretion of the procurement officer.

At the State's discretion, interviews may be waived.

SCORING GUIDE

In awarding points to the evaluation criteria, the evaluator/evaluation committee will consider the following guidelines:

Superior Response (95-100%): A superior response is an exceptional reply that completely and comprehensively meets all of the requirements of the RFP. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to the agency.

Good Response (75-94%): A good response clearly meets all the requirements of the RFP and demonstrates in an unambiguous and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

Fair Response (60-74%): A fair response minimally meets most requirements set forth in the RFP. The offeror demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

Failed Response (59% or less): A failed response does not meet the requirements set forth in the RFP. The offeror has not demonstrated sufficient knowledge of the subject matter.

EVALUATION CRITERIA

Evaluation Sections	Points Possible
Provision of Services	
Appropriateness and attention to detail in the timeline of key milestones and communication	100
Applicability and clarity of detail in project plan	300
Company Profile and Experience <ul style="list-style-type: none">• Similar work completed• Who are other clients• Reputable	200

Key Personnel Resume(s) <ul style="list-style-type: none"> • School Funding Cost Studies • Consulting • Research • Reporting/Presenting 	200
References Upon Request <ul style="list-style-type: none"> • Quality • Timeliness • On Budget 	P/F
Cost Proposal	200
Equal Pay for MT Women	50 bonus points

Lowest overall cost receives the maximum allotted points. All other proposals receive a percentage of the points available based on their cost relationship to the lowest. Example: Total possible points for cost are 200. Offeror A's cost is \$20,000. Offeror B's cost is \$30,000. Offeror A would receive 200 points. Offeror B would receive 134 points $((\$20,000/\$30,000) = 67\% \times 200 \text{ points} = 134)$.

Lowest Responsive Offer Total Cost x Number of available points = Award Points

This Offeror's Total Cost

Cost Proposal

The projected budget for this project may not exceed \$110,000 for the duration of the contract. Funds may be distributed for personnel, travel, and deliverables.

Payments for this project will be completed as follows:

- 25% payment at the signing of the contract;
- 25% following initial meeting with Commission and presentation of recommendations for study design and definition of successful school/district (expected at February 2026 meeting)

- 25% upon presentation of analysis of completed study to Commission (anticipated at June 2026 meeting); and
- 25% final payment to be completed at completion of Commission's work, September 1, 2026.