



Cover Letter

July 22, 2025

Transformational Learning District Leader,

The Montana Office of Public Instruction (OPI) is pleased to announce the application window for Phase II of the Montana Transformational Learning Grant, established in alignment with [House Bill 573](#) (HB 573).

The purpose of this grant is to further develop the efforts of the most innovative transformational learning grantees toward district-wide implementation of transformational and proficiency-based learning, as defined in [MCA 20-7-1601](#) 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.

No later than July 15, 2026, and contingent on appropriation from the legislature, the OPI will distribute funds to no more than five districts selected to participate in a Transformational Learning Phase II grant. Award amounts will be based on each district's size and the costs outlined in its application, utilizing 90% of the amount appropriated by the legislature for the grants, which is approximately \$2.5 million total in fiscal year 2027.

Application Timeline

- **Application Window:** September 1 – October 31, 2025
- **Present recommended Five Districts the Board of Public Education:** January 2026
- **Districts Notified of Selection:** April 1, 2026
- **Funds Deposited in Awardees' Flex Funds:** July 15, 2026

Successful Phase II grantees will be expected to demonstrate continued commitment to transformational and proficiency-based learning and to provide a joint report to the Education Interim Committee and the Education Interim Budget Committee no later than September 1, 2028, detailing the progress made by the grantees.

We look forward to receiving your application and partnering with you to advance Montana's vision for innovative, proficiency-based education.

Sincerely,
Susie Hedalen
State Superintendent
Montana Office of Public Instruction



Montana Transformational Learning Grant

Phase II Grant Application Form

Introduction

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.

District Information

- **District Name:** Livingston Public Schools, Districts 4 and 1
- **Contact Person:** Todd Wester
- **Title:** Curriculum Director
- **Email:** Todd.Wester@Livingston.K12.MT.US
- **Phone Number:** 406 223 6980
- **Mailing Address:** 129 River Drive, Livingston, MT 59047



Section 1: Evidence of Progress Made

In accordance with MCA 20-7-1601, please provide a clear and concise summary of your district's progress in implementing transformational and proficiency-based learning to date.

- **Describe specific strategies or initiatives your district has implemented.**
- **Include data or evidence of the impact of district strategies or initiatives (e.g., participation rates, pilot programs, student outcomes, stakeholder engagement, professional development).**
- **Attach supporting documents and letters of support if relevant.**

Overview

Leveraging Transformational Learning Grant Phase I funds, other state and federal grants, private donations, and school-community partnerships, Livingston Public Schools, Districts 4 and 1 (LPS), has developed a promising, research- and data-informed, modern approach to Multi-Tiered Systems of Support (MTSS) that has already substantially improved service to students and families. Components of this transformation include curriculum and instruction outreach, guidance, and support to local providers and programs for children aged 0-5; redesign of the District's 2-year-kindergarten as an Early Learning Program (ELP); identification and implementation of valid, reliable, efficient screening and benchmark assessments to inform tiered placement and targeted intervention in grades K-6; and establishment of a robust work-based learning program for students in grades 7-12.

Research Partners

Statewide and nationally recognized research consultants Dr. Tessie Rose Bailey, Dr. Danielle Thompson, Dr. Craig Buscher, Dr. Michelle M.M. Mazzocco, Dr. Jo Boaler, and Dr. Janet Lindow provided LPS teacher and administrator teams with key insights regarding the ways that children best learn reading, writing, mathematics, and behaviors that support learning and employability. LPS also garnered key information from employer survey work led by Todd O'hair at the Montana Chamber of Commerce, and via active participation in Montana's Work-Based Learning Collaborative and the Montana Student Wellness Advisory Committee. Most recently, the work of the Montana Innovation & Excellence in Education Working Group has provided key information.

MTSS at LPS now forms an arc spanning birth to graduation from high school, with three distinct spans within that arc:

Birth to age 5

In the years before children reach school age, the District promotes, supports, and teaches methods that parents, caregivers, and providers can use to develop skills crucial to later success in literacy, mathematics, and behaviors that support learning. Children who start school phonemically aware and skilled in phonological processing more readily develop decoding, comprehension, and writing skill than their peers who lack those skills. Similarly, those who can discriminate quantity, i.e., know



which of two numbers is greater, more readily develop mathematical skill leading to later successful completion of algebra II than their peers who lack that skill. From 2021 to 2024, funding the program using Montana Comprehensive Literacy Development Project (MCLDP) grant and philanthropic funds, LPS assumed sponsorship of the Park County Early Childhood Coalition (PCECC). During that period, LPS availed parents and early childhood providers with access to literacy consultants, provided learning mats designed to teach letters, letter sounds, phonemes, numbers, and quantity discrimination, curriculum such as Heggerty Phonemic Awareness curriculum, and numerous events wherein parents and providers could learn how to utilize the materials and strategies to develop skills.

While the Transformational Learning Grant monies did not directly fund these activities, they were a part of the comprehensive approach to MTSS that is a part of the overall transformation that has taken place in Livingston, and something that the District hopes to continue to support. As LPS and its partners in the PCECC developed the stepwise approach to assuring that there were sufficient seats in early childcare, and that students were receiving intentional curriculum and instruction in those years, scores in phonemic awareness and quantity discrimination began to rise substantially. Prior to the effort, consistently, about 75% of students in any given year entered LPS kindergarten below expected ability in letter sound recognition, phonemic awareness, number awareness, and quantity discrimination. Post the effort, consistently, about 75% of children now enter LPS with those skills. This indicates post-capacity-building project sustainability.

Grades K-6

The enhanced early childhood start seems to have a lasting effect on literacy, as scores remain improved over those of prior cohorts as students move through grades K-6. In those grades, via the MCLDP, LPS focused on development of the Science of Reading approach to literacy, and on vetting, purchase, and high-fidelity implementation of valid and reliable screening and benchmark assessments, with interventions that target specific skills diagnosed as lacking by the assessments. Those interventions show moderate to strong evidence of good effect size improvement in meta-analysis. As reported during the MCLDP years, local data at B.A. Winans Primary (grades ELP-2), East Side (grades 3-5), and Sleeping Giant Middle School (grades 6-8) indicated that in cohorts that had not previously received those interventions, it was not uncommon to see 25% to 35% growth in the percentage of students proficient in reading from fall to spring of a given year.

LPS has initiated a project to accomplish the same sort of MTSS approach to mathematics as it has done successfully with literacy. Certain components will differ. For example, whereas fluency is approximately a .85 predictor of comprehension in literacy, no such relationship shows up between math fluency and comprehension. However, the concept – let data inform placements and interventions, identify the best assessments and interventions, and utilize them with high integrity – remains identical.

The District also developed an approach to student behavioral regulation, resilience, and motivation in the grade ELP to 5 years that adheres to MTSS principles in that students receive tiered intervention based on frequency, duration, and severity of unexpected behavior, but which does not include a screening tool.



Importantly, in grades K-5, LPS has largely been able to replace the severe discrepancy model for identification for special education intervention in literacy with the MTSS approach to identification. Whereas the severe discrepancy model may leave out students who perform within their IQ range, the MTSS approach provides targeted intervention for students whose screening and diagnostic assessments indicate learning deficits and allows those who are persistent non-responders to those interventions to immediately access special education accommodations and supports. The process has been ratified by the OPI and provides LPS students with access to “just in time” interventions that often may prevent need for special education services, or that make special education services more efficient. LPS aims to scale the approach across all grades in literacy, mathematics, and behaviors that support learning.

Grades 7-12

While there is some overlap with the K-6 MTSS approach, on the recommendation of Dr. Tessie Rose Bailey, LPS handles things somewhat differently in grades 7-12. According to Dr. Bailey, long-term analysis of Response to Intervention (RTI) and MTSS indicates that at roughly grade 7, the effectiveness of discrete content area interventions wanes, and it becomes more important to look at other measures and to provide alternate pathways to successful graduation and employability.

Dr. Bailey recommends using the Early Warning System (EWS) as the primary indicator of risk of failure to graduate, and to confirm the nature of the risk by next using content-area screening with the subset of the population identified at-risk by the EWS. Some students may never have been exposed to the intervention most likely to treat their skill deficits, and could benefit from that exposure, so LPS continues to have tiered, targeted interventions in grades 7-12. But other students may have been persistent non-responders to intervention, may consistently experience significant backslide, or may simply always seem to need to revisit intervention as content increases in complexity.

For students for whom discrete content-area interventions are unlikely to produce sufficient gain, and for students of all ability levels seeking more applied learning opportunity, LPS has chosen to develop project-based, multidisciplinary, inquiry-based, work-based learning, with portfolio evaluation and proficiency-based awarding of grades and credit. Phase I Transformational Learning Grant funds provided the District with the means to hire a coordinator to support all teachers in grades 9-12 in the development of proficiency rubrics for awarding credit, and to help set up partnerships with agency and industry partners for work-based learning opportunity.

For grades 6-8, the District has been fortunate to partner with the Community School Collaborative (CSC), a privately funded, Park County non-profit which has now provided thousands of student days in a wide variety of work-based learning experiences, ranging from whole grade level career day field trips to area businesses to pop-up clubs to job shadow. While the CSC was not funded directly by Transformational Learning Grant funds, their work has been entirely complementary to the project to develop multiple pathways to student success in grades 6-12.



Importantly, the kind of hands-on, multidisciplinary, project-based, proficiency-based learning for credit described here often serves as a great equalizer between students of all abilities. It can be considered a Tier II or III intervention, and a way to show knowledge and skill via a project, for the student who persistently struggles to produce answers in the conventional fashion. On the other hand, it can allow the most advanced student an opportunity for authentic challenge in an area of interest.

The overall aim is that any student in any course could earn credit (even, dual college / high school credit, or high school credit and a valued credential) in a project-based, work-based, place-based, constructivist, and/or inquiry-based fashion. Early success in the program has included fast expansion of relationships with agency and industry partners willing to host students, now totaling 80 grade 9-12 placements; numerous individualized pathway plans wherein students could earn, via proficiency, original or recovery credit across a broad array of subjects such that 16 students have gotten back on track, stayed in school, or recovered credit; energy among a group of ambitious students who participate in Certified Nurse Assistant apprenticeships to create a Health Occupations Student Association (HOSA) chapter that took the state title in their first year of competition; and strong community desire for continued expansion.

Done well, the work to provide rigorous, effective, applied learning opportunity such as this takes a substantial commitment of time on the part of all who are organizing it, and there remains the need to build capacity among all staff with the intense efforts of some who know how. Parallel with work on this application, the District is working on an application for a public charter school called "Pathways," with specific intent to provide an alternate learning environment where students could acquire the skills and knowledge laid out in Montana content standards, but in a novel way. If Pathways becomes a reality, teachers there will act as instructional advisors, working with students to develop individualized plans for how to meet all the learning objectives required by accreditation rule in Montana.

Transformational Learning Grant monies have supported MTSS efforts school-wide. Largely facilitating that project have been the MTSS coordinators, serving teachers and students in grades ELP through 12. The coordinators deeply understand and have helped to develop the MTSS process. They master data analysis and help teachers develop skill in using data, making placement decisions, delivering targeted interventions, and progress monitoring. While sustainability requires that the MTSS project involve all staff, in the current capacity-building phase, there is temporary need for intense work of key personnel such as coordinators and consultants, who deeply understand the MTSS process and can teach it to others in an applied setting.



Section 2: Description of Continued Progress and Cost Estimates

Provide a detailed narrative of how your district plans to continue progress toward district-wide implementation of transformational and proficiency-based learning. Then use the chart below, or a similar chart, to outline the following information.

- **Describe key activities, goals, and timelines for Phase II.**
- **Explain how your staff, students, families, school board, and community will be engaged.**
- **Provide estimated costs for each major activity.**

Overview

Phase II of the Transformational Learning Grant will allow LPS to deepen, scale, and sustain the comprehensive MTSS framework established under Phase I. The project focuses on three areas of continued growth:

1. **Sustain MTSS Infrastructure** — Maintain and expand the roles of four building-level MTSS coordinators (ELP-12) to ensure, teach to others, and support data-driven decision-making, progress monitoring, and intervention fidelity.
2. **Expand Project-, Inquiry-, Place-, Work-, and Proficiency-Based Learning (Grades 7–12)** — Extend and systematize applied-learning pathways, rubric-based proficiency assessment, and credit recognition.
3. **Develop and Validate the Future Skills Implementation Index (FSII)** — In partnership with a Montana-based research firm, measure the degree to which LPS instruction cultivates current core top skills such as are identified in the Montana Innovation and Excellence in Education Working Group 2025 Report.

1. Sustaining the MTSS Framework (Birth – Grade 12)

Building on strong Phase I results, LPS will retain and expand its MTSS coordinators—one per building—to guide universal screening, tiered interventions, and progress monitoring. Coordinators will provide data coaching to teachers, lead professional learning communities, and ensure fidelity of academic and behavioral interventions. This investment sustains the continuum of supports from early childhood through secondary interventions informed by the Early Warning System (EWS). Importantly, LPS needs the coordinators to develop capacity, such that the work continues after the grant monies expire.

2. Expanding Project-, Inquiry-, Place-, Work-, and Proficiency-Based Learning (Grades 7–12)

Under Phase II, LPS will: (a) train teachers to design and assess high-quality project-based, inquiry-driven, and place-based experiences rooted in Montana's community contexts; (b) continue to develop and refine proficiency-based rubrics for awarding credit across high-school



subjects; (c) institutionalize work-based learning pathways with agency and industry partners that allow dual credit, valued credentials, or the like; (d) scale proficiency-based grading using rubrics co-developed teachers and MTSS coordinators; and (e) extend these practices to the proposed Pathways Charter School (pending approval).

Work-Based Learning Coordination and Tiered Application — The district’s MTSS coordinators serving grades 7–12 will also lead and support coordination of all applied, project-based, inquiry-based, and place-based instruction, ensuring alignment to Montana content standards, community partnerships, and proficiency-based assessment rubrics. Again, within MTSS, these experiences serve a dual purpose: for some students, a Tier II or Tier III intervention (alternate pathway for re-engagement); for others, an enrichment opportunity in advanced, authentic, real-world learning.

3. Developing, Implementing, and Sharing the Future Skills Implementation Index (FSII)

While fiscal and engineering audits happen regularly in Montana school districts, formal instructional audits take place infrequently. And while most educators agree with the statement, “we must prepare students for their future, not, for our past,” lacking bona fide measures, it can be difficult to know the extent to which that happens.

An opportunity exists to fill a need in Montana school districts. LPS aims to partner with the Montana Innovation and Excellence in Education Working Group (MIEEWG), the Office of Public Instruction, and a yet-to-be-determined Montana educational research agency or firm to help develop - and submit to a third-party instructional audit using - a tool that addresses the 26 current core top skills as presented by the MIEEWG in its 2025 report, and the World Economic Forum Future of Jobs Report of 2025. The 2025 core top skills as determined by survey of thousands of industry leaders:

1. Analytical thinking
2. Resilience, flexibility, and agility
3. Leadership and social influence
4. Creative thinking
5. Motivation and self-awareness
6. Technological literacy
7. Empathy and active listening
8. Curiosity and lifelong learning
9. Talent management
10. Service orientation and customer service
11. Artificial intelligence and big data
12. Systems thinking
13. Resource management and operations
14. Dependability and attention to detail
15. Quality control
16. Teaching and mentoring
17. Networks and cybersecurity



18. Design and user experience
19. Multilingualism
20. Marketing and media
21. Reading, writing, and mathematics
22. Environmental stewardship
23. Programming
24. Manual dexterity, endurance, and precision
25. Global citizenship
26. Sensory-processing abilities

Summary

LPS has been innovative, transformative, and of service to other districts in the state in its approach to MTSS. Current facets of the design have brought about improvements in student experience and outcomes. MTSS can now be thought of as supporting a strong early childhood start, catch-up intervention and acceleration during the early grades, and novel pathways for success and enrichment at the upper grades. While portions of the work have been funded by other revenues such as other state and federal grants, general fund, and philanthropic donation, Transformational Learning Grant monies have helped to build a comprehensive program. If successful, LPS will leverage the Phase II funds to continue innovation, transformation, and growth via expansion and scaling of early successes, and via development and implementation of a measurement tool for modern workforce skill.

Selected Resources:

Hogan, T. P., Adlof, S. M., & Alonzo, C. (2005). *The relationship between phonological awareness and reading: A review/meta-analysis.* (Review available in PMC).

Annotation: Summarizes predictive power of phonological awareness for early word reading (kindergarten–grade 2), showing PA explains a meaningful portion of variance in later reading outcomes—supports LPS’s focus on phonemic awareness in early childhood and K–2 screening. [PMC](#)

Raghubar, K. P., Barnes, M. A., & Hecht, S. A. (2010). *Early numeracy skills in preschool-aged children: A review. Frontiers in Psychology / Developmental Reviews (review).*

Annotation: Reviews early numeracy constructs (counting, cardinality, quantity discrimination) and their predictive relation to later mathematics; supports LPS emphasis on quantity discrimination and early numeracy screening. [PMC](#)

Ehri, L. C. (2020). *The science of learning to read words: A case for systematic phonics instruction. Review of Educational Research / Reading Research Quarterly.*

Annotation: Synthesizes evidence for systematic phonics and component skills (phonemic awareness → phonics → fluency → comprehension), reinforcing the Science-of-Reading model LPS is implementing in K–6. [Ila](#)

Suggate, S. (2016). *A meta-analysis of the long-term effects of phonemic awareness instruction.*



Journal of Learning Disabilities.

Annotation: Shows that early phonemic awareness instruction has durable effects, supporting sustainability claims for LPS early-childhood investments. epub.uni-regensburg.de

Nitz, J., et al. (2023). *Multi-Tiered Systems of Support with a focus on behavioral outcomes.* (Open access review in PMC).

Annotation: Recent review indicating MTSS improves elementary academic and behavioral outcomes when implemented with fidelity; provides direct evidence base for LPS's MTSS expansion. [PMC](#)

Al-Dabbagh, R., et al. (2022). *Systematic review and meta-analysis of teacher interventions for externalizing behaviors.* *Frontiers in Psychology.*

Annotation: Supports teacher-led, tiered behavioral interventions consistent with LPS's behavior regulation and resilience efforts for ELP-5. [PMC](#)

U.S. Department of Education (brief): *Issue Brief—Early Warning Systems.* (U.S. ED evaluation brief)

Annotation: Summarizes national practices and effectiveness of EWS for identifying students at risk of dropout and guiding interventions. Useful for operationalizing LPS secondary EWS protocols. [U.S. Department of Education](#)

Balfanz, R., & Byrnes, V. (State-of-the-Field). *Early Warning Indicators and Intervention Systems.* (Policy handbook/research synthesis)

Annotation: Practical handbook summarizing EWS indicators (attendance, behavior, course performance) and guidance on intervention systems — used widely to design EWS for grades 7–12. pathwaystoadultsuccess.org

Shepley, C., et al. (2019). *MTSS for preschool-aged children: A review.* *Early Childhood Research Quarterly / ScienceDirect.*

Annotation: Provides evidence that MTSS models adapted for preschool can improve social-emotional outcomes and school readiness—relevant to LPS PCECC and early coaching approach. [ScienceDirect](#)

Murphy Odo, D. (2021). *Meta-analysis of effect of phonological awareness instruction.* *SAGE Open.*

Annotation: Recent meta-analytic evidence of moderate-to-large effects of PA instruction — supports investment in explicit phonemic awareness curricula and coaching. [SAGE Journals](#)

Research on early numeracy longitudinal meta-analysis (2024/2024–2025 updates). *Early numeracy predicts later mathematics: Longitudinal meta-analysis (2024/2025 preprints/meta-analyses).*

Annotation: Large meta-analytic evidence linking early numeracy measures to later math outcomes; supports the predictive validity of LPS's early numeracy screenings and interventions. [ResearchGate+1](#)



Planned Activities & Estimated Costs

Activity	Description	Cost Year 1 (FY2026)	Cost Year 2 (FY2027)	Total Cost (2 Years)
Personnel Costs	4 FTE MTSS Coordinators / Developers and training time for all staff outside normal contract hours (salary, benefits, incidentals)	\$320,000	\$320,000	\$640,000
Research & Innovation Partner	Development and local implementation of a third-party, core skills, shareable, instructional audit tool	\$35,000	\$15,000	\$50,000
Evaluation & Data Systems	Costs associated with data and observation tools, e.g., Qualtrics or similar	\$5,000	\$5,000	\$10,000
	Total Estimated Phase II Budget:	\$360,000	\$340,000	\$700,000



Section 3: District Assurances

By submitting this application, the district assures it will:

- ☒ (a) Further develop district-wide implementation of transformational and proficiency-based learning as defined in MCA 20-7-1601.
- ☒ (b) Use knowledge gained during Phase II to develop recommendations and guidance for other Montana districts interested in innovating.
- ☒ (c) Engage in technical assistance and collaborative opportunities with other Transformational Learning grantees to collaborate in learning and share best practices and resources statewide.
- ☒ (d) Provide a joint report with other grantees to the Education Interim Committee and the Education Interim Budget Committee no later than September 1, 2028 on the progress made through this grant opportunity.



Authorized Signatures


I hereby certify that the information provided in this application is accurate and that the district agrees to the assurances stated above.

Superintendent Name: Eldon Chad Johnson

Superintendent Signature: 

Date: 10/29/25

School Board Chair Name: Dan Vermillion

School Board Chair Signature: 

Date: 10/29/25

Attachments Checklist

- ☒ Summary and evidence of current progress
- ☒ Narrative of Phase II district-wide implementation
- ☒ Budget chart including activities, descriptions, and pricing
- ☒ Letters of Support and additional documents (optional)

Submission Instructions

Please submit your completed application and any additional documents by October 31, 2025 at 5pm using the Qualtrics survey button found on the [OPI Transformational Learning website](#).

For questions, please contact: Krystal Smith, Education Innovation Manager at krystal.smith@mt.gov. Please find the evaluation rubric attached.



Phase II Transformational Learning Grant Application Evaluation Rubric

<i>Criteria</i>	<i>Exemplary (5)</i>	<i>Proficient (3)</i>	<i>Developing (1)</i>
Evidence of Impact from Previous Transformational Learning Funding	Provides clear, compelling evidence with data, examples, and stakeholder engagement.	Provides adequate evidence with some examples and limited data.	Lacks clear evidence or provides only general statements.
Description of Continued Progress	Detailed plan with clear goals, timelines, roles, and alignment to HB 573 purpose.	Adequate plan with general goals and timelines.	Vague plan with few details or unclear alignment.
Cost Estimates & Budget	Cost estimates are detailed and aligned with planned activities.	Cost estimates generally align but lack detail.	Cost estimates are unclear or misaligned.
District Assurances and Documentation	All required names, signatures, and dates are included, signifying district's understanding of assurances and commitment to implementing a proficiency-based learning system district-wide.	Missing a required name, signature, and/or date, making it unclear of the district's understanding of assurances and commitment to implementing a proficiency-based learning system district-wide.	No required names, signatures, and dates are included, signifying district's lack of understanding of assurances and commitments.
Clarity & Completeness	Application is clear, well-organized, complete, and on-time with all required documentation.	Application is understandable but may have minor gaps.	Application is unclear or missing key information.

Total Score: ____ / 25

Evaluators Comments:
