

AGENDA
Board of Trustees
Columbia Falls School District Six
Regular Board Meeting
Monday, November 10, 2025
6:00 p.m.
School District Six Board Room

- 1. Call to Order**
- 2. Pledge to the Flag**
- 3. Approval of Agenda**
- 4. Consent Agenda.**

- Approval of Board Meeting Minutes – Pgs. 1-5
- Approval of October Bills
- Approval of Investment Reports
- Out of District Approval – SY 25-26
26-196 26-197 26-198 26-199 26-200

- 5. Public Participation**

- Student Body Representative

- 6. Reports**

- Written
 - Board Standing Committees – See website for reports
 - Penni Anello – Glacier Gateway – Pg. 6
 - Allison Hawes – Ruder – Pg. 7
 - Ted Miller – Junior High – Pg. 8
 - Josh Gibbs – High School – Pg. 9
 - Mark McCord – Curriculum – Pg. 10
 - Michelle Swank – Special Services – Pg. 11
- Verbal
 - MTSBA Update – Barb Riley
 - Clerk / Business Manager – Dustin Zuffelato – Pgs. 12-14
 - Superintendent – Cory Dziowgo
 - Board Chair – Jill Rocksund

- 7. Action/Discussion Items:**

- Early Learning Program update at Glacier Gateway – Penni Anello and Kristy Orem.
- Consideration of Res. #447- Disposition of Abandoned, Obsolete, and Undesirable Property. Pgs. 15-24
- Consideration of the Statewide Health Insurance Trust – Bridged Health Alliance:
 - Multi District Agreement for the Formation of the Bridged Health Alliance Trust – Pgs. 25-26
 - Participation Agreement – Bridged Health Alliance Trust – 27-34
 - Trust Agreement – 35-51
- Consideration of the following Transportation Committee recommendations:
 - Annual School Bus Replacement – FY 27
 1. Purchase SPED bus – 2027 Bluebird
 2. Dispose Bus #38 – 2009 Bluebird VIN 0672
- Review of the November 4, 2025 High School General Obligation Bond Election
 - Canvass of Votes and Declaration of Results, and Certificate of Election. – Pg. 52-53

8. Personnel

a. The superintendent has accepted the following resignations:

Linda Jaquette	Bus Driver – effective 10-14-25
Rory Christiaens	HS Counselor – effective 10-10-25

b. Consideration of the Elementary Hiring Recommendations:

Julia Teeters	Kindergarten Para – Ruder Elementary
Anna Pickard	Girls Basketball Coach – Junior High School
Stephen Blados	Special Education Para – Junior High School
Mark Casazza	Boys Basketball Coach – Junior High School
Bryan McGrath	Boys Basketball Coach – Junior High School

c. Consideration of the following High School / District-wide Hiring Recommendations:

Alia Hanson	Campus Professional Development Specialist
Ross Lingle	Counselor
Kendra Skelton	Special Education Para
Benjamin Woody	Head Play Director/Drama Coach
Emily Hackethorn	Assistant Drama Coach
Kate Daniels	Non CDL Activity Bus Driver
Dean Perry	Full-time Bus Driver/Bus Washer
Aaron Finney	IT Support Technician – Tier 1

d. Consideration of the November substitute hires (see attached): - Pg. 54

9. Miscellaneous and Future Planning:

- Health Insurance Committee Meeting – November 19, 2025 – 4:00 PM

10. Adjournment

**The next Regular Board Meeting will be held at 6:00 p.m.,
Monday, December 8, 2025, in the School District Six Board Room**

REGULAR MEETING
BOARD OF TRUSTEES
SCHOOL DISTRICT #6
OCTOBER 13, 2025

Confidential

The Regular Meeting of the Board of Trustees of School District Six was held at 6:00 P.M., Monday, October 13, 2025, in the Boardroom of the administration offices at 501 Sixth Avenue West, Columbia Falls, Montana.

PRESENT:

Jill Rocksund Board Chair
Barbara Riley Vice Chair
Megan Upton Trustee
Keri Hill Trustee
Amanda Pacheco Trustee
Casey Heupel Trustee
Cory Dziowgo Superintendent of Schools
Dustin Zuffelato Business Manager/Clerk

ABSENT:

Justin Cheff Trustee
Heather Mumby Trustee

Call to order at 6:01 P.M. by Board Chair Rocksund.

CALL TO ORDER

Motion by Heupel, second by Upton, to approve the agenda as presented.
Passed 6-0.

APPROVE AGENDA

Motion by Pacheco, second by Hill, to approve the consent agenda.

APPROVE CONSENT
AGENDA

- Approval of Board Meeting Minutes
- Approval of September Bills
- Approval of Investment Reports
- Student Activity Account Transfer
 - o Fund 147-Class of 2025 to Fund 143-Junior Class 2027
- Out-of-District Approval – SY 25-26
 - o 26-193
 - o 26-194
 - o 26-195

Passed 6-0

Public Participation:

Approximately seven (7) people participated in the meeting remotely via Google Meets.
Approximately eight (8) people participated in person.

PUBLIC
PARTICIPATION:

Student Body Representatives Greyson Pfeifle (Student Body Vice President) and Alston Olson (Student Body President) shared with the Board activities around the High School. The student counsel hosted a movie night on the soccer field during homecoming week. The movie was The Goonies. The fall blood drive is coming November 4th. The National Honor Society is busy planning the Veterans' Day assembly. Climates Smart Glacier County is hosting a flooding prevention presentation in the Little Theater. Both the boys' and girls' soccer teams won the northwest conference and playoffs will be starting. The football team beat Whitefish the Friday prior to the meeting.

REGULAR MEETING

OCTOBER 13, 2025

PAGE 2

REPORTS:

Written Reports:

Board Standing Committees' reports are located on the District's Website.

The Elementary School Principals (Penni Anello, Allison Hawes, and Ted Miller) provided the Board with written reports.

High School Principal, Josh Gibbs, provided the Board with a written report.

Curriculum Director, Mark McCord, provided the Board with a written report.

Special Services Director, Michelle Swank, provided the Board with a written report.

Verbal Reports:

Trustee Barbara Riley provided the Board with the recent proceedings of the Consortium of State School Board Associations (COSSBA) and the Montana School Board Association (MTSBA). Montana School Board Association Annual Conference starts Wednesday of current week. Mrs. Riley was in Washington D.C. meeting with all four of Montana's congressional representatives working on the new USAC E-Rate Program rulings and trying to protect the Wi-Fi resources and hot spots on busses for rural areas. Will be meeting with diligent assembly reviewing three resolutions by schools. MTSBA put forward their GAP resolution, Missoula School District is asking to expand the elements of the school funding formula to incorporate more at risk and other basic components, and Bozeman is looking for transformational work to consolidate districts into a county wide district similar to Missoula County. Bridged Health met with the District's insurance committee. Some other districts that have decided to participate in the statewide Trust include Lewistown, Bozeman, and Corvallis schools. State wide, one district out of roughly sixty will see a marginal increase in insurance rates. The plan is very competitive and our District wouldn't see any changes to the current plan structure, but would get help with stoss loss coverage and prescriptions. There is a possible 5% reduction in costs.

District Business Manager/Clerk provided the Board with a written report. Mr. Zuffelato reported that the E-rate Program is used to reduce costs on the technology infrastructure, as well as broadband connectivity to the different schools. The District will be working on the application that is due in December. The Tech Director, Aaron Wiersma, has ideas to bolster the current services with more on how the internet is connected to each building. The District had looked at how to connect buses to the routing program and to better the communication for substitute bus drivers; The state insurance program is quite an undertaking with a minimum participation threshold of 12,000 lives. Bridged Health Alliance did a great job of structuring the program to fit all the unique Districts throughout the State. This program will be very unique, but still structured similarly to our plan. The services being a percentage of Medicare will really help control the district's costs.

Superintendent Cory Dziowgo mentioned that there have been five community meetings over the High School Facility Bond with a handful of participants. Mr. Dziowgo encourages those who still have questions to reach out and attend the couple remaining presentations. Ballots

REGULAR MEETING
OCTOBER 13, 2025
PAGE 3

Unofficial

will be sent mid-October and must be either mailed or dropped off in Kalispell. The Trades Academy is getting a lot of attention. Mr. Dziowgo will be presenting at the Kalispell Chamber of Commerce meeting. The application will be submitted on October 30, with an interview in November, and approval in January. The Superintendent also mentioned that mid-terms report cards are posted in the schools.

Board Chair Jill Rocksund had nothing more to add.

Action/Discussion Items:

Motion by Riley, second by Heupel, to approve the Master Services Agreement with Global Archives.

Public comment was requested and there was none.

Passed 6-0.

ACTION /
DISCUSSION ITEMS:

MOTION TO APPROVE
MASTER SERVICE
AGREEMENT WITH
GLOBAL ARCHIVES

Motion by Riley, second by Pacheco, to approve all policies listed on the third and final readings.

- 2150 Suicide Awareness and Prevention
- 2335 Human Sexuality Instruction and Identity Instruction
- 3141 Out-of-District Student Enrollment
- 3655 Student Protection
- 8560 Display of Flags and Banners on District Property
- 5122 Criminal Background Investigations
- 5321 Leave of Absence
- 8111 Transportation of Students with Disabilities

Public comment was requested and there was none.

Passed 6-0.

MOTION TO APPROVE
ALL LISTED POLICIES
ON THIRD AND FINAL
READING

Motion by Riley, second by Upton, to approve the CFEA Collective Bargaining Agreement for SY 25-26.

Chair Rocksund thanked the union for interesting, good discussions. Mrs. Rocksund believes the outcome is a strong CBA and salaries make us competitive with other surrounding districts.

Public comment was requested and there was none.

Passed 6-0.

MOTION TO APPROVE
THE CFEA 25-26 CBA

Motion by Pacheco, second by Riley, to approve the recommended changes to the following bus routes:

- Bus 11
- Bus 14

Public comment was requested and there was none.

Passed 6-0.

MOTION TO APPROVE
BUS ROUTE CHANGES

Motion by Riley, second by Upton, to approve the following independent contract agreements:

- Virginia Paulson
- Susan Hartman

Public comment was requested and there was none.

Passed 6-0.

MOTION TO APPROVE
INDEPENDENT
CONTRACT
AGREEMENTS V. PAUL-
SON AND S. HARTMAN

REGULAR MEETING

OCTOBER 13, 2025

PAGE 4

Unofficial

PERSONNEL:

Personnel:

The Board acknowledged the following resignations previously accepted by the Superintendent: Shelby Rohletter – Junior High Special Education Paraeducator; Ashley Thomas-Meager – Junior High Special Education Paraeducator; Camilla Emond – Ruder Kindergarten Paraeducator; Tabitha Freeman – District Bus Driver and Hot Lunch Helper/Floater; Jarrod Joy – District Bus Monitor; Joshua Forke – High School Campus Professional Development Specialist

MOTION TO APPROVE
ELEM. DISTRICT
HIRING
RECOMMENDATIONS

Motion by Upton, second by Pacheco, to approve the following Elementary District hiring recommendations: Ryan Floyd – Junior High Study Hall Paraeducator; Leslie Craver – Junior High Library Paraeducator; Christopher Grace – Junior High Football Coach; Julie Scribner – Ruder Special Education Paraeducator; Eric Backes – Junior High Boys' Basketball Coach; Benjamin Woody – Junior High Long-Term Substitute Teacher
Passed 5-0.

MOTION TO APPROVE
HS AND DISTRICT-
WIDE HIRING
RECOMMENDATIONS

Motion by Heupel, second by Hill, to approve the following High School/District-wide Hiring Recommendations: Michael Clickenbeard – District Bus Monitor; Brittney Hulett – District Non-CDL Activity Bus Driver; Alysha Wassam – High School Assistant Cheer Coach; Kyle Babcock – High School Head Swim Coach; Joy Jacobus – High School Special Education Paraeducator; Benjamin Woody – High School Head Drama coach
Passed 6-0.

MOTION TO APPROVE
SUBSTITUTE HIRES

Motion by Riley, second by Upton, to approve the substitute hires.
Passed 6-0.

MOTION TO APPROVE
CFHS CHOIR TRIP TO
SPOKANE

Motion by Riley, second by Heupel, to approve the proposed CFHS choir trip to Spokane, Washington. Superintendent Dziowgo shared that the trip qualifies to be paid for by the Advanced Opportunity Grant to help take the burden off families of \$750 per student. Public comment was requested and there was none.
Passed 6-0.

MOTION TO APPROVE
PROFESSIONAL
DEVELOPMENT
COMMITTEE OUT-OF
STATE TRAVEL
RECOMMENDATIONS

Motion by Riley, second by Hill, to approve the Professional Development Committee recommendations for the following PD Grant Applications for out-of-state travel:

- Bridget Chiarito – National Council of Teachers of Mathematics Conference – February 11-13, 2026 – Indianapolis, IN
- Dawn Wheeler – National Council of Teachers of Mathematics Conference – February 11-13, 2026 – Indianapolis, IN
- Alicia Hakes – Get Your Teach On Conference – January 17-19, 2026 – Las Vegas, NV
- Emily Hagreen – Get Your Teach On Conference – January 17-19, 2026 – Las Vegas, NV
- Tricia Hall – Get Your Teach On Conference – January 17-19, 2026 – Las Vegas, NV
- Callie Moore – Get Your Teach On Conference – January 17-19, 2026 – Las Vegas, NV
- Alia Hanson – National Council for Teachers of English Annual Conference – November 20-23, 2025 – Denver, CO

Passed 6-0.

REGULAR MEETING
OCTOBER 13, 2025
PAGE 5

Unofficial

Motion by Upton, second by Pacheco, to approve the following out-of-state travel requests:

- Becky Bates and Jessica Moultray – Northwest Council for Computer Education Conference – February 25-27, 2026 – Seattle, WA – Funded through the Carl Perkins Grant

Passed 6-0

MOTION TO APPROVE
CARL PERKINS OUT-
OF-STATE TRAVEL

Miscellaneous and Future Planning:

- Special Board Meeting – October 27, 2025 – 6:00 P.M.
- Election – November 4, 2025
- Regular Board Meeting – November 10, 2025
- Insurance Committee Meeting – November 19, 2025 – with a voting deadline on BHA on October 29, 2029

MISCELLANEOUS
AND FUTURE
PLANNING:

As there was no further business to come before the Board, Chair Rocksund adjourned the meeting at 6:31 P.M.

MEETING
ADJOURNED .

Board Chair

Business Manager/Clerk

November Board Report

COLUMBIA FALLS
SCHOOL DISTRICT #6

Schools: Glacier Gateway, Ruder Elementary,
Columbia Falls Junior High, Columbia Falls High School



Challenging, Diverse, and Supportive Learning Environment

Fourth grade students from GG performed a skit introducing WILDCAT PRIDE on the bus during our assembly and the kids loved it!

Teachers continue to build their knowledge around the new reading/writing curriculum for implementation in every classroom with fidelity.

- Office of public instruction sent a guest speaker for Red Ribbon week that presented the dangers of vaping for youth.
- ### Upcoming Events
- Turkey Trot, November 22nd
 - Food Drive, November 3rd--November 14th
 - MAST Testing, Current- Dec. 13th
 - Parent Teacher Conferences Quarter 1, Nov. 10-15th

High Performing Workplace

Teachers from Ruder Elementary and Glacier Gateway are collaborating to ensure greater consistency in grading practices within Infinite Campus and in the criteria for Reading and Math interventions. Staff from both schools have met—and will continue to meet—during early release professional development time to align expectations and strengthen support for all students.

This work directly supports the district's goal of sustaining an ongoing system of staff-involved professional development, fostering shared learning and consistent instructional practices across schools.

Organizational Effectiveness

Our MTSS team will analyze our staff survey to take action to improve our community at Glacier Gateway.

Our Student Support Team is receiving requests for supporting students through intervention. This system ensures we are using Data to identify students, systematic interventions for providing needed support, and communication with parents.

Family & Community Engagement

Glacier Gateway hosted our annual Trunk or Treat on Halloween night. We had 22 trunks, fire department, CFPD, highway patrol, and border patrol. We had over 500 trick or treaters.

We kicked off our annual Thanksgiving Food Drive on Monday, Nov. 3rd. Turkey Trot will be the Saturday before Thanksgiving and is always a fun time for all. Parent Teacher conferences will be November 10th-15th.

District Facilities Support & Enhance Learning

We added a play structure to our Early Learning playground to give our students more large motor opportunities for play.

Focusing on safety in our building we have been focusing on enforcing all visitors before school, during school and after school to check in at the office and get a visitors pass. We want all staff and students to feel safe at school and at work.

Glacier Gateway

November Board Report

SCHOOL DISTRICT #6

Schools: Glacier Gateway, Ruder Elementary, Columbia Falls Junior High, Columbia Falls High School

COLUMBIA FALLS



Challenging, Diverse, and Supportive Learning Environment

Christian Parrish Takes the Gun—Supaman, an Apsáalooke rapper and fancy war dancer from Crow Agency, MT—led a dynamic assembly at Ruder. Through music and storytelling, he shared aspects of his Indigenous culture and modeled empathy, grit, creativity, and independence. His message—don't let fear dominate, live for today, and choose happiness—encouraged Wildcats to embody courage, hope, respect, and gratitude, co to being Ruder learners and leaders. This experience advanced our goal to focus on a well-rounded education by integrating fine arts, cultural learning, and health and physical well-being, complementing core academics and inspiring the whole child.

High Performing Workplace

Teachers from Ruder Elementary and Glacier Gateway are collaborating to ensure greater consistency in grading practices within Infinite Campus and in the criteria for Reading and Math interventions. Staff from both schools have met—and will continue to meet—during early release professional development time to align expectations and strengthen support for all students. This work directly supports the district's goal of sustaining an ongoing system of staff-involved professional development, fostering shared learning and consistent instructional practices across schools.

Organizational Effectiveness

Ruder is developing and implementing a digital behavior referral form to streamline reporting, organize documentation, and track behavior data more efficiently and effectively. We shared the vision with Superintendent Dziwogo and leveraged his technology expertise to bring the system to life. This initiative advances the goal to establish communication and information systems among individuals, programs, and services to promote effective organizational

Family & Community Engagement

Ruder welcomed Officer Vukonich, Officer Willey, and Deputy Minaglia and their K9 partners from the Northwest Drug Task Force for a Red Ribbon Week presentation. Officers delivered a PowerPoint on healthy choices and living a drug-free life, followed by a K9 demonstration showing how canines detect dangerous items to help keep our community safe. This event established a collaborative community partnership with local law enforcement, enhancing student learning through real-world safety

District Facilities Support & Enhance Learning

Ruder has been proactive in ensuring that any volunteer who may be unsupervised with students completes fingerprinting and a background check prior to working with students. Additionally, all non-staff adults entering the building are required to check in at the office and wear a visible Visitor Pass at all times. We have also worked diligently to inform and remind staff of these procedures to ensure that no situation falls through the cracks and that safety protocols are consistently followed throughout the building.

Ruder Elementary

Upcoming Events

- 11/10-14 - MAST testing - grades 3rd-5th
- 11/11 - Veterans Day Assembly at CFHS gym - 10:25 AM
- 11/21 - 4th Grade Renaissance Fair at Ruder
- 11/21 - Turkey Bingo at Ruder - 4:30 - 7:30 PM
- 11/26 - 11/28 - NO SCHOOL - Thanksgiving Break

Dealer's Choice

- Several of our students have been attending Special Olympics events and representing Ruder with excellence. We are incredibly proud of their effort, sportsmanship, and Wildcat spirit!

November Board Report Building/Department

COLUMBIA FALLS

SCHOOL DISTRICT #6

Schools: Glacier Gateway, Ruder Elementary,
Columbia Falls Junior High, Columbia Falls High School



Challenging, Diverse, and Supportive Learning Environment

A team discussed the importance of our Wildcat Way Assemblies and how to best schedule them to meet the needs of our students. In addition, there was discussion about what to include in the assemblies to support student achievement, learning, and growth.

Our Emote process was reviewed. We had valuable input and discussion on how to best use the system to provide student support, intervention, and gather useful data.

High Performing Workplace

The Wildcat Building Team met to discuss staff concerns and bring new ideas to the team. The main discussion was focused on our new schedule. We will gather data & start a scheduling committee in January to discuss options. We also discussed new ideas to motivate & celebrate students.

We have held WIN Teams PLCs and technology PD. WIN Teams focused on preparation, collaboration, and provided feedback on the current schedule.

Organizational Effectiveness

Our MTSS Team met and discussed re-teaching of expectations throughout the year, staff survey results, and areas to improve/successes. Our staff survey shows we have done a great job implementing BLUE and celebrating students. We also discussed the importance of using student data to make adjustments throughout the school year to respond to needs and supports, especially behavior data.

Family & Community Engagement

We have built some partnerships with local businesses and continue to do so. For example, Stockman Bank donated a large sum of money to our school. There will be more information to come on that.

Our website and social media continue to improve. We have a lot of engagement with families on the platforms.

The PTO hosted a Halloween Dance. It was a huge success and a ton of fun! 215 students attended!

District Facilities Support & Enhance Learning

Our student body voted to purchase a Gaga Ball Pit to upgrade our playground. Also, students were able to provide ideas to improve our playground area. The Student Council came up with this plan to gather input from students. There have been many great ideas and the SC will determine which ones to implement. Providing activity allows student to release energy, have a "brain break," and be learning ready when returning from recess.

Upcoming Events

- Parent Teacher Conferences Nov. 11th & 13th
- No School - Thanksgiving Break Nov. 26th-28th
- 7th Gr. Boys' Basketball Tournament Dec. 4th-6th
- 8th Gr. Boys' Basketball Tourney Dec. 8th-10th

Wildcat Way

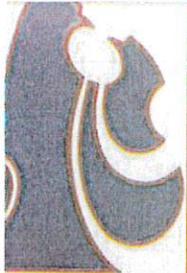
- The Student Store has been a success so far! Student Council is going to have a contest to create a design to paint the Student Store. In addition, there will be some apparel added to the store in the near future.

Junior High

November Board Report

SCHOOL DISTRICT #6

Schools: Glacier Gateway, Ruder Elementary, Columbia Falls Junior High, Columbia Falls High School



Challenging, Diverse, and Supportive Learning Environment

CFHS had the honor of hosting the Fall Youth Summit Consortium through our Believe Blue and Democracy Project. Students from across the valley, including Glacier, Flathead, Bigfork, and Whitefish, joined us for a day of collaboration and leadership. Students worked together to revise Group Agreements, review feedback and ideas for next year's Youth Summit, and explore themes from the Summit's Blue Sky discussions. They then applied those ideas in school-specific strategic planning sessions. We are proud of our students for leading meaningful work that strengthens student voice and civic engagement across the valley.

High Performing Workplace

We are pleased to share that several open positions have been filled over the past month. Most notably, we have hired a new school counselor, Mr. Lingle, who brings extensive experience and will be an excellent resource in supporting our students. In addition, we have filled several coaching and club advisor positions, including a new advisor for our Drama Club. We are excited to bring drama back to CFHS and continue expanding opportunities for our students.

Organizational Effectiveness

Our teachers continue to focus on establishing and fostering a positive, collaborative culture across all departments. A key goal is to ensure the Portrait of a Graduate becomes an active part of daily instruction, not just a poster on the wall. This year, we have continued working with our curriculum groups by bringing junior high and high school staff together to have shared conversations and collaborative planning. This allows a better aligned curriculum in grades 6-12.

Family & Community Engagement

Our Student Council recently hosted a successful blood drive, partnering with local businesses to help support the event. Students organized donations from several businesses in town, contributing to a positive and well-supported experience for donors.

We were proud to host a pep assembly and fire truck parade in honor of our Girls Soccer Team and their incredible accomplishment of winning the State Championship. It was a great celebration of their hard work and dedication

District Facilities Support & Enhance Learning

We recently wrapped up the campaign for the high school bond and had the opportunity to engage in meaningful discussions and receive valuable feedback during our final community informational nights. Unfortunately, the bond did not pass. We sincerely thank everyone who came out and supported these efforts. We remain committed to providing a high level of education and will continue to explore ways to maintain and improve our facilities at CFHS.

Upcoming Events

- Nov. 10 Northwest A Band Festival
- Nov. 11 Veterans Assembly
- Parent Teacher Conferences Nov. 11th & 13th
- No School - Thanksgiving Break Nov. 26th-28th

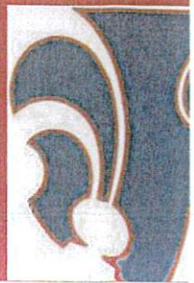
Staff Shoutout: Emily McCaffree

Emily McCaffree has been named the Education Support Professional of the Year by the Montana Federation of Public Employees. This recognition reflects her dedication, compassion, and the positive impact she makes every day for the students at CFHS.

High School

November Board Report Building/Department

SCHOOL DISTRICT #6
Schools: Glacier Gateway, Ruder Elementary,
Columbia Falls Junior High, Columbia Falls High School



Challenging, Diverse, and Supportive Learning Environment

Throughout the month, the district offered multiple professional development sessions focused on supporting curriculum implementation, including:
- Amplify Boost
- Enhanced Planning CKLA
- Screenastify
- Montana Education Consortium ELA K-3
- Class Intervention

High Performing Workplace

The ESL team reviewed current ELL services in CFSDE, including identification, support, and monitoring. The district currently has 19 active ELLs, 4 monitored students, and 10 potential ELLs. The team also reviewed program materials, newcomer supports, digital tools, and upcoming professional learning, including the virtual WIDA Conference.

Organizational Effectiveness

The GT team reviewed current processes for the district's Gifted & Talented/Extended Studies program, including updates to the 2024-25 Program Plan and timing for student screeners. The team also discussed the \$6,000 Montana GT bi-annual grant, new CogAT norms, and planning for 2025-26 services and professional development.

Family & Community Engagement

An updated School-Parent Compact was crafted and shared for upcoming parent conferences. The compact outlines how parents, school staff, and the students will share the responsibility for improved student academic achievement, and how the school and parents will build and develop a partnership to help children achieve the State's high academic standards.

District Facilities Support & Enhance Learning

On extended early release we continued our work with staff on identifying lessons, activities and practices that will bring our Portrait of a Learner to life. This will help to ensure classrooms are both academically rigorous and emotionally safe.

- ### Upcoming Events
- 11/19 MTSS Campus Level Priorities Meeting
 - 12/1 District MTSS Meeting
 - 12/2 GT Campus Coordinator Meeting

Quotable

- "Human beings have an innate inner drive to be autonomous, self-determined, and connected to one another. And when that drive is liberated, people achieve more and live richer lives."
Daniel Pink

November Board Report

SCHOOL DISTRICT #6

Building/Department

Schools: Glacier Gateway, Ruder Elementary, Columbia Falls Junior High, Columbia Falls High School



COLUMBIA FALLS

Challenging, Diverse, and Supportive Learning Environment

Our students in our Life Skills program at the Junior High actively participated in a collaborative pumpkin carving activity that promoted creativity and teamwork. The activity was intentionally structured to support inclusion and ensure all students, including those with diverse abilities and needs, could participate meaningfully.

High Performing Workplace

Over the past month, two additional paraprofessional positions have been successfully filled, providing increased support for our students and instructional programs. However, staffing needs remain, as we continue to seek qualified candidates to fill paraprofessional positions at both the Junior High and High School levels. Recruitment efforts are ongoing to ensure adequate support across all buildings.

Organizational Effectiveness

On Oct. 30th, SD6 Special Education Department submitted the Annual Child Count; the State Child Count is an annual data collection mandated under the Individuals with Disabilities Education Act (IDEA). It provides a comprehensive snapshot of the number of students with disabilities who are receiving special education services across school districts.

Family & Community Engagement

Our SD6 Special Olympics program continues to thrive and provide meaningful opportunities for student-athletes. Recently, our athletes participated in a basketball tournament, demonstrating teamwork, sportsmanship, and dedication. In the coming month, athletes will transition to the bowling season, with training and competitions leading up to the final bowling tournament scheduled for the end of November.

District Facilities Support & Enhance Learning

The Montana School for the Deaf and Blind (MSDB) recently provided updates to its Outreach Model for school districts. The revised model is designed to enhance the efficiency of support services and strengthen collaboration with school teams. These improvements aim to better address students' individual learning needs and ensure more effective, student-centered support across educational settings.

Upcoming Events

- November 12th: OPI Training: Best Practices Writing Transition IEPs

Staff Shout Outs

- Amy Caudill, HS Special Education Teacher, received a classroom grant to purchase leveled book sets for her students with varying ability levels.

SPED Dept
- 11 -

TO: Board of Trustees
FROM: Dustin Zuffelato, Business Manager/Clerk
DATE: November 6, 2025
RE: **Business Office Report for the November 10, 2025 Regular Meeting**

Bridged Health Alliance

Representatives from Bridged Health Alliance presented the proposal to the Health Insurance Committee on October 8th. It was very apparent that this program was built from the ground up for schools, by schools. Furthermore, the self-insurance trust that Columbia Falls School District has operated for the past 30+ years was used as a model. The trust was formed with different tiers to meet the various needs/size of the multitude of Districts throughout the state. The tier C falls would operate within, would be very similar to the existing structure. Specifically, the District would continue to operate the self-insured program and retain any and all net proceeds between the difference of the premiums paid and the claims incurred. Same plan structure while leveraging the purchasing power of a pool comprised of over 12,000 lives (over 16x our existing program). Not only will this drive down our premiums in the first year by approximately 5%, the purchasing power will allow the plan to maintain stable claims and admin costs. The District would be moving from our current third party administrator (EBMS) to Allegiance Benefit Plan Management. Contracts with (some) providers will be based on a multiple of Medicare, with the ability to continue to negotiate with all of the large facilities operated throughout our state. The Bridged Health Program will provide access to the Cigna network-on a national level, and remove the current way the plan controls cost by using ELAP to unilaterally reprice claims, subjecting members to balance bills. In summary, the District will retain autonomy in things such as premiums, plan design, coverages, and preferred providers yet leverage the purchasing power of a much larger pool to control the costs of administration, stop loss insurance, and claim costs.

Multi District Agreement – Each School District must execute this Agreement to join the Multi District Cooperative to become a participating School District of the Bridged Health Alliance Trust. The District will contribute to the Trust as required in the participation agreement from the District's Self Insurance Fund.
Participation Agreement – The Trust sponsors the Bridged Health Alliance Plan. The District is bound by the terms of the Trust Agreement. The Trust is under the direction and control of the Board. The District acknowledges that the (Trust) Board, in its sole discretion, shall select the benefits made available to all participating school districts. The benefits offered through the Trust are limited to those set forth in the Plan Document. The (Trust) Board in consultation with an actuary, establishes the contribution rates. The District will remit monthly contributions to the Trust based on the rates/benefits offered to participants. Broker/Agent Fees will be paid by the Trust (on behalf of the District) and baked into the rate structure. Rates for various plan options will be proposed/selected annually by each participating District. In the event the Trust is not adequately funded, **the Trust may authorize an assessment to each participating school district to ensure adequate funding is available** including to pay all liabilities of the Trust existing upon dissolution of the Trust. The intent of the Trust is to provide health insurance benefits. The Trust may also offer ancillary benefits including dental, vision, life. The funds for these ancillary benefits shall be accounted for separately from any funds of the Trust. As part of the State Law establishing the Trust, beginning July 1, 2036, **the trust shall remit any excess reserves to the State on an annual basis until the cumulative amount exceeds \$40 million**, MCA 20-3-370. The District may not withdraw from the Trust unless the District has participated in the Trust for five consecutive years.

Trust Agreement – Annual Financial Report shall be filed with the Montana Commissioner of Securities and Insurance. The participating districts will elect eleven (11) Trustees to serve on the Board. In the interest of maintaining a broad representation of different geographic areas and school district sizes, the Trustees shall be comprised of (6) Reps of the AA Districts and (5) Reps of Districts of other sizes (A, B, C, and independent Elementary Districts). Trustees will be elected to three-year terms with no term limits. Terms will be staggered.

Transportation Committee

Staffing Update: Currently three (3) Full Time Drivers. Almost fully staffed! Still have one opening for Route 11. Operating with one mechanic is adequate based on part-time assistant mechanic as well as full-time drivers working to maintain the buses. TR1 for Bus Routes were submitted to the OPI on October 31. Difference from budget was related to the SPED Routes. Specifically four routes with a combined reduction of 43 miles per day. This represents a reduction of state/county funding of approximately \$23,000. The budget impact will be mitigated by the reduction of staffing expenses as compared to budgeted. With regards to the annual bus replacement, the FY2027 Bus Depreciation Budget max levy is \$470,560. The bus cost that the District would otherwise be able to depreciate on an annual basis is \$565,000. As such, the levy is less than the state allowed annual depreciation based on 20% of the value of each bus within our fleet. The District has 31 buses in the fleet. 9 are fully depreciated. 5 are Activity Buses. 12 are spare buses-not operating daily, of which three are fairly new (less than 5 years old) propane fueled buses. The District determined that new route buses were not necessary based on this scenario with ample spare buses and a relatively new fleet. The District replaced an Activity Bus during the current year. The District determined the most effective use of the FY27 budget was to replace a Special Education Bus. The cost is just over \$200,000. This should result in just over \$250k being able to be transferred to the Multi District Agreement Fund in FY 2027 to be used for other purposes, while maintaining the same bus depreciation fund levy.

High School Facility Improvement Project Bond Election

Total Ballots sent – registered voters: 10,242

Total Ballots Cast 4,633

TURNOUT 45%

For comparison the Elementary District GO Bond Election in 2019 had 8,889 registered voters and 3,687 cast ballots. 41% Turnout. This proposition narrowly passed by 96 votes.

Monthly Insurance Claim Summary

Paid Claims October 2025

Medical Plan Paid Claims	\$ 315,885
Specific Stop Loss Liability	\$ 0

Monthly medical expected claims based on an enrollment of 224 Plan participants

(65 singles/159 families): \$ 235,200

Plan claim liability as a percentage of expected claims: 134.30 %

Paid Claim summary plan year-to-date (July 2025 through OCTOBER 2025):

	<u>Actual</u>	<u>Expected</u>	<u>Percentage</u>
Medical Plan Paid Claims	\$ 1,086,817	\$ 927,593	117 %
Specific Stop Loss liability	0		
Total Claims	\$ 1,086,817		

Federal Grants Update

The District recently submitted the annual application for the ESEA, IDEA, Gifted and Talented, and McKinney Vento Grants.

ESEA Schoolwide Title I

FY 2025 Appropriation \$ 1,171,472

Used to fund 8 FTE Teachers and 4 FTE Paras.

\$10,000 set aside for tutoring

\$10,000 set aside for mentor program

\$105,000 set aside for professional development

\$191,094 used for curriculum material-Math and Reading.

FY 2026 Appropriation \$ 1,476,128 **\$ 304,656 INCREASE**

Used to fund **12 FTE Teachers** and 4 FTE Paras. Funded four additional teachers to free-up Elementary District General Funds to accommodate increases to the collective bargaining agreement not included in the original budget adopted in August (\$300,000).

\$9,000 set aside for tutoring

\$20,000 set aside for mentor program

\$111,000 set aside for professional development

\$60,000 used for curriculum material-Math and Reading.

IDEA

FY 2025 Appropriation \$ 704,477

Used to fund 5.75 FTE Teachers and 7.5 FTE Paras.

FY 2026 Appropriation \$ 617,830

Used to fund 5.75 FTE Teachers and **3.5 FTE** Paras.

The District used the Tuition Fund to fund these para positions no longer able to be funded by IDEA in FY26.

For comparison purposes, total SPED budget for FY26 is \$3,496,144. **The IDEA allocation funds a mere 17%** of this total budget to serve students and comply with the federal IDEA laws. Furthermore, the District employs 24.60 Certified Teachers and specialists to serve SPED students. Of which, 5.75 (23%) are funded by IDEA. The District employs 35 SPED Paras and 3.50 (10%) are funded by IDEA.

Gifted and Talented

\$ 6,000 biannual state appropriation

McKinney-Vento Education for Homeless Children

\$ 10,553 appropriation

RESOLUTION NO. 447

**DISPOSITION OF ABANDONED, OBSOLETE AND UNDESIRABLE
PROPERTY**

A RESOLUTION TO AUTHORIZE THE BOARD OF TRUSTEES OF SCHOOL DISTRICT NO. 6, COLUMBIA FALLS, MONTANA TO DISPOSE OF ABANDONED, OBSOLETE AND UNDESIRABLE PROPERTY THROUGH THE SALES OR OTHER MEANS, AS PROVIDED BY SECTION 20-6-604, MCA.

WHEREAS, it has been determined certain personal or real property as documented in a list available in the Columbia Falls School District Business Office has become abandoned, obsolete and undesirable by School District No. 6

THEREFORE, BE IT RESOLVED, the Board of Trustees will dispose of this property through the sale or other means commencing on December 5, 2025 which will be at least 14 days after notice of this resolution has been made in the manner required in Section 20-20-204, MCA.

PASSED AND APPROVED BY THE BOARD OF TRUSTEES OF SCHOOL DISTRICT NO. 6 THIS 10th DAY OF NOVEMBER, 2025.

Chairperson

Date

Attest:

Business Manager/Clerk

Date

S.D. Tag #	Description	Model	Serial #	Condition/ Reason
n/a	First Act Flute		n/a	Instrument very old. In need of serious repair
	Armstrong Clarinet		16954547	Instrument very old. In need of serious repair
	Bach Trumpet	tr 300	B71197	Instrument very old. In need of serious repair
	Getzen Trumpet	300 series	R28392	Instrument very old. In need of serious repair
	Bundy Trombone		940558	Instrument very old. In need of serious repair
	Conn Clarinet		544228	Instrument very old. In need of serious repair
	Yamaha Trumpet	TYR 2320	26993	Missing 2 valves
	Conn Trombone	6H	346298	Instrument very old. In need of serious repair
	Horn (no brand)		8411	Instrument very old. In need of serious repair
	Bach Trombone		E39764	Instrument very old. In need of serious repair
	Kenosha Clarinet	7214	B16794	Instrument very old. In need of serious repair
	Conn Clarinet		544228	No case, no mouthpiece
	Conn Alto Sax		N145434M	No mouthpiece, need full repair
	Getzen Trombone		351-4653	Slide broken
	Selmer Bass Clarinet		80685	Multiple broken keys
	Bundy Bass Clarinet		1722	needs new pads throughout + adjust keys
	Bundy Tenor Sax		954330	broken key gaurd, new pads
	Selmer Alto Sax		1318898	broken key gaurd, new pads
	Vito Clarinet		C39200	needs key adjustment, new pads
	Mendini Trombone		D1412051	Not great instrument

	Yamaha Flute	FYL 22	907261	All keys are busted... ROUGH shape
	Bundy Clarinet		219532	Needs new pads, key adjustment
	Band Stand Music Lights (17)			From the 90s. Haven't used in 10 years. Still work ok.
	Marching Drum Harness		Multiple	Old Harnesses do not fit new drums.

Asset Tag ID	Description	Cost	Purchase Date	Date Disposed	Dispose to
OKXGVD	OptiPlex 7010			10/21/2025	
1KMWKM1	Dell Optiplex 960			08/27/2025	
1TC7GD3	Dell Chromebook 3100			08/13/2025	
29Y6GD3	Dell Chromebook 3100			08/13/2025	
3KS8GD3	Dell Chromebook 3100			08/13/2025	
3MKDTW1	OptiPlex 7010			10/27/2025	
3QB51L1	cf.internal			10/27/2025	
3R0GWV1	Dell desktop			10/07/2025	
3RSTZ12	Dell desktop			10/30/2025	
489SSW1	OptiPlex 7010			10/30/2025	
48CSSW1	OptiPlex 7010			10/06/2025	
4R0BGD3	Dell Chromebook 3100			08/13/2025	
5RNW5V1	(OLD) OptiPlex 9010			10/27/2025	
60L2W52	OptiPlex 9020			10/06/2025	
63R4MF2	Dell Chromebook 11 (3120)			08/13/2025	
64326V1	OptiPlex 9010			10/06/2025	
68T6GD3	HS 2025 Senior Chromebooks			09/22/2025	
6CM9K02	OptiPlex 7010			09/19/2025	Need Help?
6CR7K02	OptiPlex 7010			10/06/2025	

6CX7K02	OptiPlex 7010			11/04/2025	
6DFBK02	OptiPlex 7010			10/27/2025	
701JWT2	Dell Chromebook 3100			08/13/2025	
71CX1D2	Dell Chromebook 11(3120)			09/17/2025	
72206Y2	Dell Chromebook 3100			09/22/2025	
766JNQ2	Dell Chromebook 11 (3180)			08/13/2025	Maint bldg
78913X2	Dell Chromebook 11 (3180)			08/14/2025	
7VSFJ5J	OptiPlex 7010			08/13/2025	Moved to maint bldg for disposal
83VHCX1	OptiPlex 7010			10/27/2025	
8538GD3	Dell Chromebook 3100			09/22/2025	
8H2L2H2	Dell Chromebook 11 (3180)			08/13/2025	Maint bldg
8QQWV1	OptiPlex 7010			10/07/2025	
8SSGJ5J	OptiPlex 7010			08/27/2025	
92X2PM1	OptiPlex 7010			10/27/2025	
9564X33	Dell Chromebook 3100			08/14/2025	
9SSGJ5J	OptiPlex 7010			10/30/2025	
9WBWBX1	OptiPlex 7010			09/22/2025	
B0Q1LN1	Dell desktop			08/21/2025	
B87M6Y1	OptiPlex 9010			10/27/2025	
BLSXLJ1	OptiPlex 960			08/27/2025	
BRC23X2	Dell Chromebook 11 (3180)			08/13/2025	Maint bldg

BYSQ1R1	OptiPlex 790			10/06/2025	
C3JZ5Y2	Dell Chromebook 3100			08/13/2025	
C738GD3	Dell Chromebook 3100			08/13/2025	
C7TX0X2	Dell Chromebook 3100			08/14/2025	
CBBGV12	OptiPlex 7010			10/06/2025	
CKTFXQ3	Dell Chromebook			08/14/2025	
CPJ13X2	Dell Chromebook 11 (3180)			08/14/2025	
D06Y6Y1	OptiPlex 9010			08/25/2025	
DG623X2	Dell Chromebook 11 (3180)			08/13/2025	Maint bldg
DJ17GD3	Dell Chromebook 3100			08/13/2025	
DKGGNQ2	Dell Chromebook 11 (3180)			08/13/2025	Maint bldg
DMZ6GD3	Dell Chromebook 3100			08/13/2025	
DR0BGD3	Dell Chromebook 3100			08/13/2025	
DRVKXQ3	Dell Chromebook 3110			08/13/2025	
F3X73X2	Dell Chromebook 3100			08/13/2025	
FL1MH02	OptiPlex 7010			10/27/2025	
FPCM2H2	Dell Chromebook 11 (3180)			08/13/2025	Maint bldg
FR494V1	1K4DSY3			08/27/2025	
FRC7GD3	Dell Chromebook 3100			08/13/2025	

G3CMNQ2	Dell Chromebook 11 (3180)			08/14/2025	
G5D13X2	Dell Chromebook 11 (3180)			08/14/2025	
G9PG2D3	Dell Chromebook			09/22/2025	
GQS5GD3	Dell Chromebook 3100			08/13/2025	
H4C4CX1	H4C4CX1			07/24/2025	Ewaste Room
HWQLZV1	OptiPlex 7010			10/30/2025	
HZ3CGX1	OptiPlex 7010			10/06/2025	
JJVQ2H2	Dell Chromebook 11 (3180)			09/18/2025	
2UA32207VN	2UA32207VN			08/12/2025	
3CM2080TKD	HP monitor			10/13/2025	
MXL1250P9N	Compaq 8300 Elite			08/12/2025	
MXL2070QMD	Compaq 8300 Elite			08/12/2025	
MXL2461PYK	Compaq 8300 Elite			08/13/2025	Moved to maint bldg for disposal
MXL30409BY	Compaq 8300 Elite			08/12/2025	
MXL30409C0	Compaq 8300 Elite			08/12/2025	
MXL30409C5	Compaq 8300 Elite			08/12/2025	
MXL31910BD	Compaq 8300 Elite			08/12/2025	
MXL31910BF	Compaq 8300 Elite			08/13/2025	Moved to maint bldg for disposal
MXL4080MH8	Compaq 8300 Elite			08/12/2025	
VND3Q20805	HP Printer			10/31/2025	
U91151601750	ViewSonic VA1917A Monitor			08/12/2025	
U91151601760	ViewSonic VA1917A Monitor			08/12/2025	

U91151601784	ViewSonic VA1917A Monitor			08/12/2025	
U91151601798	ViewSonic VA1917A Monitor			08/12/2025	
U91151601843	ViewSonic VA1917A Monitor			08/12/2025	
U91151601865	ViewSonic VA1917A Monitor			08/12/2025	
U91151601868	ViewSonic VA1917A Monitor			08/12/2025	
RJLQ9HA003372	Amazon basics			09/16/2025	
CN0MC040641806343MYC	Dell monitor			10/21/2025	
CN0MC0406418064L2MQS	Dell E176FPc			08/27/2025	
CN0MC0406418064Q35US	Dell E176FPc			10/31/2025	
CN0N445N742610A5086C	Dell monitor			08/25/2025	
CN0PVGRC744453CQC4EL	Dell monitor			10/09/2025	
CN0UW042641807AJ4NES	Dell 1908FPc Monitor			08/12/2025	
CN0VHPX374445284250L	Dell monitor			10/09/2025	
CN0VHPX374445284305L	Dell monitor			10/09/2025	
CN0W5HWR74445387B25S	Dell monitor			10/21/2025	
CN0WH3187287276U0JJS	Dell monitor			08/13/2025	Moved to maint bldg for disposal
CN0WH3187287276U10NS	Dell monitor			08/13/2025	Moved r
CN0WH3187287276U11AS	Dell monitor			10/07/2025	
CN0WH3187287276U1NGS	Dell monitor			10/09/2025	

Quantity	Equipment Description	General Equipment Type	Approx. Age	Approx. Value	Date Added To List
17	15" - 17" Monitors	Monitors	15+	\$0	2/28/25
28	HP-Compaq 8100s	Desktops	17	\$0	2/28/25
29	HP-Compaq 8100s	Desktops	17	\$0	3/20/25
29	15" - 17" Monitors	Monitors	15+	\$0	3/20/25
19	HP-Compaq 8100s & Other Old desktops	Desktops	15+	\$0	3/27/25
32	HP-Compaq 8100s & Other Old desktops	Desktops	15+	\$0	3/31/25
37	15" - 17" Monitors	Monitors	15+	\$0	3/31/25
39	49" DELL Monitors	Monitors	3	\$50	5/7/25
1	Hp Standing	Printer			7/22/25
4	Hp	Printer			7/22/25
13	Square Dells (black)	Monitor			7/22/25
1	Square Dells Silver)	Monitor			7/22/25
1	ViewSonic	Monitor			7/22/25
29	Asus	Monitor			7/22/25
29	US micro desktops	Desktop			7/22/25
1	55" Hisense	TV			7/22/25
1	39" JVC	TV			7/22/25
1	Hp network switch				7/22/25
10	Dell desktops	Desktop			7/22/25
1	Unknown	Desktop			7/22/25
14	LG	Monitor			7/22/25
3	ViewSonic	Monitor			7/22/25
1	Scepter	Monitor			7/22/25
1	Kensington (*really* old)	Monitor			7/22/25
3	Hp	Monitor			7/22/25
31	Dell	Monitor			7/22/25
67	Asus	Monitor			7/22/25
99	Hp	Desktops			7/22/25
10	Z Space	Drawing tablet			7/22/25
1	desktop + monitor				7/22/25
3	*Thick* laptops				7/22/25
1	Thinkpad				7/22/25
2	Dell Poweredge 1950	Servers			
1	projector				
3	printers				
6	Asus	Monitor			7/24/25
1	Acer	Monitor			7/24/25
22	Square Dells	Monitor			7/24/25
1	Square Hp	Monitor			7/24/25
1	Hp deskjet	Printer			7/24/25
2	Brother innobella	Printer			7/24/25
1	Samsung Hi-Fi stereo	Stereo			7/24/25
8	HP Compaq 8300 Elite	Desktop			8/12/25
7	ViewSonic VA1917A	Monitor			8/12/25
1	Brother Printer	Printer			8/12/25
1	JVC camcorder	Camera			8/12/25
1	Ruckus access Point	Access Point			8/12/25
1	Acer Chromebook	Laptop			8/12/25
1	Dell desktop	Desktop			8/13/25
3	Dell 15" monitors	Monitor			8/13/25

3	HP Compaq 8300 Elite	Desktop		8/13/25
2	OptiPlex 7010	Desktop		8/13/25
1	HP DeskJet 2755e	Printer		8/13/25
12	Samsung Galaxy Tablet SM-T280	Tablet		8/13/25
3	IView tablets	Tablet		8/13/25
45	Chromebooks	Chromebooks		
1	Dell 22"	Monitor	3	8/19/25
1	Samsung TV from Shanks' room (JH)	TV		8/28/25
1	Dell E178FPc	Monitor	17	
1	Dell P2012Ht	Monitor	12	10/23/25
1	Dell E176FPc	Monitor	19	10/23/25

**MULTIDISTRICT AGREEMENT
FOR THE FORMATION OF THE BRIDGED HEALTH ALLIANCE TRUST**

[*Columbia Falls*] School District is entering into this MULTIDISTRICT AGREEMENT with other Participating School Districts effective as of the date executed below.

RECITALS:

WHEREAS, Montana Code Section 20-3-366 allows the formation of a district health insurance trust by a multidistrict agreement under Montana Code Section 20-3-363;

WHEREAS, Montana Code Section 20-3-363 permits the boards of trustees of any two or more school districts ("Participating School Districts") to enter into a multidistrict agreement;

WHEREAS, the multidistrict agreement creates a multidistrict cooperative to perform any services, activities, and undertakings of the participating districts;

WHEREAS, each school district must execute this Multidistrict Agreement to join the multidistrict cooperative to become a Participating School District;

WHEREAS, although each Participating School District individually executes this Multidistrict Agreement, each agreement is part of the same agreement. **NOW**, therefore, the Participating School Districts agree as follows:

TERMS:

1. The Participating School Districts agree to enter into this Multidistrict Agreement to form the Bridged Health Alliance Trust ("Trust").
2. The services provided by the Trust on behalf of the Participating School Districts shall include the provision of health insurance benefits to eligible employees and their dependents as set for in the Trust Agreement and Participation Agreement governing the district health insurance trust.
3. The Participating School Districts intend for the Trust to qualify as a district health insurance trust under Montana Code Section 20-3-363 and will seek such qualification from the state auditor.
4. Each Participating School District must execute the Participation Agreement to enroll as a member of the Trust.
5. The Participation Agreement shall contain the terms and conditions of enrollment and eligibility of the Trust.
6. A Participating School District may withdraw from the multidistrict cooperative by withdrawing from the Trust pursuant to Section 11 of the Participation Agreement.

7. Each Participating School District shall contribute to the Trust as required in the Participation and Trust Agreements from the school district's general fund, budgeted funds other than the retirement fund or debt service fund, or nonbudgeted funds other than the compensated absence liability fund.
8. The Participating School Districts agree that the amount of such contributions to the Trust shall be calculated by the Boards of Trustees of the Trust as described in the Participation and Trust Agreements.
9. The term of this Multidistrict Agreement shall begin on the effective date and continue until the Trust is terminated pursuant to Section 7.2 of the Trust Agreement. If the Trust is terminated, the multidistrict cooperative shall also dissolve.
10. This Multidistrict Agreement shall be interpreted according to and governed by the laws of the state of Montana.

By: [Columbia Falls] School District

Name: _____

Title: Jill Rocksund
Board Chair

Date: _____

BRIDGED HEALTH ALLIANCE TRUST

PARTICIPATION AGREEMENT

THIS PARTICIPATION AGREEMENT is made and entered into by and between [*Columbia Falls*] School District (the "Participating School District") and the Board of Trustees of the Bridged Health Alliance Trust (the "Trust").

RECITALS:

WHEREAS, Montana Code Section 20-3-366 allows the formation of a district health insurance trust by a multidistrict agreement pursuant to Montana Code Section 20-3-363;

WHEREAS, Montana Code Section 20-3-363 permits the boards of trustees of any two or more school districts to enter into a multidistrict agreement;

WHEREAS, the multidistrict agreement creates a multidistrict cooperative to perform any services, activities, and undertaking of the participating districts;

WHEREAS, expenditures made in support of a multidistrict agreement may be made from the interlocal cooperative fund of each Participating School District under Montana Code Section 20-3-363;

WHEREAS, the Participating School District entered into the Multidistrict Agreement to form the Bridged Health Alliance Trust ("Trust") and pool risk by way of a self-insurance plan;

WHEREAS, the Trust shall provide health insurance benefits to Participants, as the Multidistrict Cooperative Trust Agreement defines that term, as an activity of the participating districts;

WHEREAS, the Trust shall sponsor the Bridged Health Alliance Plan ("Plan");

WHEREAS, under the terms of the Multidistrict Agreement, each Participating School District must execute this Participation Agreement to enroll in the Trust;

THEREFORE, the signatory parties agree with each other as follows:

Section 1. Incorporation of Terms of the Trust. All the terms, conditions, and provisions of the Multidistrict Cooperative Trust Agreement (the "Trust Agreement") are incorporated herein by this reference and shall be fully binding upon the parties hereto. By executing this Participation Agreement, the Participating School District, in accordance with Article II of the Trust Agreement, shall cause the Participating School District to participate in the Trust and the Plan, effective as of the date indicated in Section 17 of this Participation Agreement.

Capitalized terms used but not otherwise defined, herein, shall have the meanings set forth in the Trust Agreement establishing the Trust, as amended, modified or supplemented from time to time.

Section 2. Adoption of the Trust and the Plan. The Participating School District hereby adopts the Trust Agreement and the Plan. The Participating School District agrees to be bound by the terms of the Trust Agreement, as it may be amended from time to time. The Trust Agreement shall be

incorporated into this Participation Agreement and made a part of such Participation Agreement. The Participating School District will be notified of any material amendment to this Participation Agreement and the Trust Agreement. In the event that any term of the Participation Agreement is inconsistent with any terms of the Trust Agreement, the terms of the Trust Agreement shall control.

Section 3. Approval of Participation. The Board of Trustees of the Bridged Health Alliance Trust (the "Board") hereby approves the Participating School District's participation in the Trust and Plan subject to satisfaction of all representations and requirements hereunder.

Section 4. Governing Board. The Trust shall be under the direction and control of the Board. The Board shall establish such rules and regulations, as may be necessary for its operation, the conduct of business, and the operation of the Trust. Such rules and regulations may be amended by the Board as necessary. The Montana state auditor or the auditor's designee shall be an ex officio nonvoting member of the Board as required under Montana Code Section 20-3-366. The Board shall first determine any question or dispute with respect to the rights and obligations of the parties to this Participation Agreement and the adopted Trust Agreement.

The Participating School District acknowledges and agrees that the Board, in its sole discretion, shall select the benefits to be made available to all Participating School Districts and the extent to which the Participating School District may choose from among such benefits. The benefits offered through the Trust are limited to those set forth in, and are subject to all terms and conditions of, the applicable governing Plan documents and policies.

Section 5. Contributions. The Board, in consultation with a qualified actuary, shall establish contribution rates for each Participating School District of the Trust pursuant to the Plan and Plan options elected by the Participating School District. The Participating School District will remit monthly contributions based upon rates established and applicable to each program year for the health benefit program it offers to its Participants.

- (a) Rate tables for each Participating School District will be determined by the Board based upon advice from a qualified actuary. Rates may vary depending upon factors including, but not limited to, demographic characteristics, loss experience of the Participating School District, loss experience of all Participating School Districts, and benefits provided.
- (b) Billing and eligibility management services will be provided by a Claims Administrator or vendor selected by the Board.
- (c) Administrative costs shall not exceed twelve (12) percent of total costs, as required under Montana Code Section 20-3-366, as determined by the actuary using reasonable actuarial methods. Billing dates, payment due dates, and any late fees and/or penalties are set by the Board and defined in the offer Proposal ("Proposal," Exhibit A attached). All Participating School Districts will receive separate notification of any changes in due dates and/or penalty fees at least 30 days prior to effective date of change.
- (d) Unless the Board determines otherwise, any payments the Participating School District owes to the Trust for coverage of its Participants shall be made directly to the Trust. The Board shall establish the deadline for payment of each contribution.
- (e) In the event that any Participating School District fails to pay the full amount due by the deadline, the Board may assess a penalty on the Participating School District in such amount as determined by the Board, not to exceed ten (10) percent of the full amount due at such missed deadline. In the event the unpaid balance is placed for collection, the

Trust shall charge, and such Participating School District shall pay, the cost of collections of such due and unpaid amounts, including, but not limited to, reasonable attorney fees, court costs, and other costs of collection.

- (f) If the Participating School District fails to pay contributions or premiums in such timely fashion as the Board may determine, the Board may notify Participants and suspend payment of all claims relating to the Participating School District and its Participants. The Board may also terminate the Participating School District's participation in the Trust as described in Section 11.
- (g) The Participating School District shall select between the distinct tiered funding models offered by the Board in writing, subject to the Participating School District's eligibility for such selection.
- (h) Rate tables will not include commissions for brokers or insurance agents. The Trust may distribute commissions to such broker or agent on a Participating School District's behalf, provided that such commissions are disclosed prior to the Participating School District's funding model selection.

Section 6. Proposal. The Trust will furnish the Participating School District with a Proposal that outlines the specific commitments offered to the Participating School District and the requirements that accompany those commitments. Each Proposal will define at least the following:

- (a) Benefit designs available;
- (b) Contribution rates for health insurance benefits;
- (c) Premium rates for ancillary benefits;
- (d) Contribution and premium payment rules, requirements and timing;
- (e) Administrative services offered through the Plan, including any services contracted through service providers;
- (f) Minimum eligibility requirements for employees and dependents; and
- (g) Assumptions and information relied upon as accurate during the proposal development.

The Participating School District shall indicate their selection of benefits and acceptance of rates by signing the Proposal annually, and the Proposal shall be deemed part of and subject to this Participation Agreement and the Trust Agreement upon such signature.

Section 7. Assessments. In the event that the Trust is not adequately funded, the Trust may utilize pro-rata assessments to a Participating School District to ensure adequate funding is available. The shared risk of assessments shall be equally allocated among Participating School Districts as required under Montana Code Section 20-3-366. Determination of an assessment must be done by the Trust's actuary and in consultation with the state auditor. The Board shall timely notify the Montana Commissioner of Securities and Insurance if the state auditor determines such an assessment is necessary. If an assessment is declared, allocation will be based upon each Participating School District's proportional share of total premium paid for the preceding three (3) years or the number of years the Participating School District participated in the Trust if less than three (3).

Section 8. Surplus Funds. Should the Trust be funded in excess of actuarial and accounting requirements as established by the Board, the excess funds may be credited to Participating School Districts in accordance with the following:

- (a) Determination of surplus funds must be assessed by the Trust's actuary as well as a third-party auditor;
- (b) Return of surplus funds shall be used sparingly and in accordance with the purpose and objectives of the Trust;

- (c) Participating School Districts must be current participants to receive the benefit of any surplus funds except upon termination of the Trust and distribution of assets; and
- (d) Fund equity will be evaluated on a total program-wide basis as opposed to each year standing on its own.

Section 9. Participating School District Obligations. The Participating School District agrees to the following:

- (a) The Participating School District shall maintain staff to act as liaison with the Board and the Claims Administrator.
- (b) The Participating School District agrees to pay contributions or premiums in accordance with the rates and schedule defined in the Proposal for the initial term and all relevant renewal terms for the duration of participation in the Plan and the Trust.
- (c) Benefits provided to Participants shall be as set forth in a plan summary provided to Participating School Districts.
- (d) Benefits provided, and related enrollment options, through the Trust shall be communicated in a timely manner to each Participant.
- (e) The Participating School District agrees to promptly provide the Trust with a complete and accurate census of its eligible employees and such additional information as is necessary for the Trust to administer benefits.
- (f) The Participating School District agrees to notify the Trust within ten (10) business days or prior to the end of the month, whichever is sooner, of any change in the eligibility status of a Participant which might affect eligibility for coverage.
- (g) In the event that the Participating School District fails to timely notify the Trust of any change in status of Participants which might affect eligibility for coverage, the Participating School District agrees that the Trust and Plan will not be responsible for any claims incurred that are not payable pursuant to the terms of the Plan.
- (h) Upon request, the Participating School District agrees to provide the Trust with such documentation that may be reasonably necessary for the substantiation of eligibility.
- (i) The Trust Agreement prohibits any preexisting health benefits trust or a Participating School District from imposing its liabilities on the Trust at any time.

Section 10. Trust Obligations. The Trust agrees to the following:

- (a) It is the intent of this Participation Agreement for the Trust to provide self-insured health insurance benefits.
- (b) The Trust may also offer the following ancillary benefits: dental, vision, life insurance, short-term disability, long-term disability, employee assistance program, voluntary insurance benefits, critical illness and accident insurance, gap health insurance, legal insurance, identity theft insurance, and pet insurance. The funds for ancillary benefits shall at all times be accounted for and recorded separately from any funds of the Trust. The provision of ancillary benefits shall not be permitted to interfere with or contravene the Trust's purpose of providing self-insured health insurance benefits.
- (c) The Trust will establish a pool of funds consisting of contributions from all Participating School Districts, the incentive payment provided for by Montana Code Sections 20-3-366-370, and any earnings and profits thereon. Funds shall be used by the Trust or its designee to pay claims as incurred by Participants, and all the operational, insurance and administrative costs incurred by, and attributable to, the Trust. These funds will be

administered under the control and direction of the Board or through agents or employees whom the directors may appoint.

- (d) The funds of the Trust, including the incentive payment, contributions, future legislative appropriations, and any grants, shall only be used to provide health insurance benefits to Participants.
- (e) The Trust shall furnish descriptive materials (such as the Summary Plan Description, Summary of Benefits and Coverage and notifications required under the Consolidated Omnibus Budget Reconciliation Act of 1985) to each Participating School District accurately outlining the health insurance benefits provided to Participants through the Trust including terms and conditions of coverage.
- (f) The Trust shall provide Plan options with associated contribution and premium rates from which Participating School Districts may select from annually as part of a process to offer Participants benefits during open enrollment periods.
- (g) The Board will maintain reinsurance, stop loss, or other forms of excess insurance, on behalf of the Trust as needed.
- (h) The Board will appoint a licensed third-party administrator ("Claims Administrator"), in writing, to adjudicate Plan claims and provide various administrative services, and such Claims Administrator shall comply with all applicable state licensing requirements.
- (i) The Board will authorize the retention of various parties to assist with the management of the Trust and its funds.
- (j) Beginning July 1, 2036, the Trust shall, as part of its annual actuarial analysis, identify and report to the state auditor no later than 90 days following the completion of its annual audit, any excess reserves existing in the Trust. The Trust shall remit to the state any excess reserves identified under such actuarial analysis until the cumulative amounts remitted reaches \$40 million, as required under Montana Code Section 20-3-370. If the aforementioned actuarial analysis finds that no excess reserves exist in the Trust under Montana Code Section 20-3-370 and any associated rules developed by the state auditor, the Trust shall not remit any funds to the state.

Section 11. Membership Withdrawal. A Participating School District's participation in the Trust shall remain in effect unless the Participating School District voluntarily withdraws from the Trust pursuant to Montana Code Section 20-3-367. Additionally, the Board may terminate the Participating School District's participation in the Trust for cause, such as nonpayment or late payment of contributions. Such termination will be effective such date as the board may specify in writing, but in no case less than fifteen (15) days after the date of the termination notice. Termination does not relieve the Participating School District of its financial commitments to the Trust.

As required under Montana Code Section 20-3-367, a Participating School District that voluntarily joins the Trust may not withdraw from the Trust unless:

- (a) the Participating School District has participated in the Trust for at least five (5) consecutive school fiscal years; or
- (b) the Participating School District has an inflation gap factor equal to or greater than 1.5, after which such district or group may withdraw from the Trust upon the conclusion of the plan year in which the Trust reports an inflation gap factor to the district or employee group above 1.5 (or an inflation gap factor meeting or exceeding the requirements under any enacted amendment to Montana Code Section 20-3-367).

To complete its withdrawal, the Participating School District shall notify the Board in writing of its intent to withdraw no later than one hundred and eighty (180) days prior to its actual termination date. Such withdrawal will be effective at the end of the plan year following such notice period, unless the Participating School District has an inflation gap factor equal to or greater than 1.5 as described in Section 11(a) above, in which case the Participating School District may withdraw from the Trust effective upon the conclusion of the plan year as long as notice is provided prior to the end of such plan year. The Board shall timely notify the Montana Commissioner of Securities and Insurance when a Participating School Districts submits its notice of intent to withdraw from the Trust.

The Participating School District may rescind its notice of intent to withdraw unless otherwise barred by the applicable provisions of the Trust Agreement. Following a withdrawal under this section, such a school district:

- (a) is ineligible to rejoin the Trust for at least five (5) full school fiscal years following the year in which the district withdraws;
- (b) is ineligible for receipt of any portion of the net assets or reserve balance of the Trust attributable to the distribution of funds under the stabilization payment created by Montana Code Section 20-3-369 on withdrawal; and
- (c) shall reimburse the Trust for the run-out liability of the withdrawing district or employee group. Such liability consists of all claims of the withdrawing district or employee group that were incurred by the Participants prior to the effective date of the district's or employee group's withdrawal.

Section 12. Acknowledgment. This Participation Agreement is entered into voluntarily after careful consideration by the Participating School District's staff and Board of Trustees. The Participating School District acknowledges that it has had adequate opportunity to consult with legal counsel and health insurance experts prior to entering into this agreement. The Participating School District further acknowledges that:

- (a) it has not relied on any promises or assurances of future performance;
- (b) that health care and insurance costs are rising;
- (c) there is no assurance or guarantee that contributions to the Trust and insurance premium payments will not continue to increase over the long term;
- (d) the terms and conditions of the Plan may change from time to time; and
- (e) there is no guarantee that rates, terms, and conditions will remain the same from plan year to plan year.

Any changes to Participating School Districts' required contributions shall not be effective until the start of the following plan year.

any changes to Participating School Districts' required contributions shall not be effective until the start of the following plan year.

Section 13. Complete Agreement. Except as otherwise provided herein, this Participation Agreement and the adopted Trust Agreement constitute the full and complete agreement of the Participating School Districts.

Section 14. Severability. Should any provision of this Participation Agreement be judicially determined to be void or unenforceable, such determination shall not affect any remaining provision.

Section 15. Amendment of Participation Agreement. This Participation Agreement may be amended by a majority vote of the Board and signature on the Participation Agreement by the Participating School District's designated representative, or alternate, who shall have authority to execute this Participation Agreement. Any Participating School District who fails or refuses to execute an amendment to this Participation Agreement shall be deemed to have withdrawn from the Trust on the next annual renewal date that is beyond any commitment required by the Trust Agreement.

Section 16. Indemnification.

- (a) To the fullest extent authorized by law, and to the extent not otherwise covered by insurance, the Board shall be indemnified by the Trust against any and all liabilities arising by reason of any act, or failure to act, in relation to the Plan or the Trust, including without limitation, expenses reasonably incurred in the defense of any claim relating to the Plan or Trust, and amounts paid in compromise or settlement relating to the Plan or Trust, unless (1) it is established by a final judgment or a court of competent jurisdiction that such act or failure to act constituted gross negligence or willful misconduct, or (2) in the event of a settlement or other disposition of the claim, it is determined in a written opinion of legal counsel to the Plan or Trust that the act constituted gross negligence or willful misconduct.
- (b) To the fullest extent authorized by law, and to the extent not first covered by insurance or the Trust's indemnity set forth in Section 16(a), the Board, and the Participating School Districts shall be indemnified by the Participating School Districts against any and all liabilities arising by reason of any act, or failure to act, in relation to the Plan or the Trust, including without limitation, expenses reasonably incurred in the defense of any claim relating to the Plan or Trust, and amounts paid in compromise or settlement relating to the Plan or Trust, unless (1) it is established by a final judgment or a court of competent jurisdiction that such act or failure to act constituted a breach of fiduciary duty, gross negligence or willful misconduct, or (2) in the event of a settlement or other disposition of the claim, it is determined in a written opinion of legal counsel to the Plan or Trust that the act constituted a breach of fiduciary duty, gross negligence or willful misconduct.

Section 17. Effective Date. This Participation Agreement shall be effective upon execution of this Participation Agreement, provided that the Trust has been approved by the Montana state auditor as required under Montana Code Sections 20-3-366-370. Such approval is subject to the Trust securing a binding contractual agreement among at least 150 districts, employing a minimum of 12,000 employees to participate in and obtain health insurance for its employees through the Trust.

Section 18. Counterparts. This Participation Agreement may be executed in one or more counterparts, each of which will be deemed an original.

IN WITNESS WHEREOF, the Participating School District and the Board of Trustee of the Bridge Health Alliance Trust have caused this Participation Agreement to be executed on the dates indicated below, effective as set forth in Section 17 hereof. The Participating School District acknowledges that it has received and agreed to the terms of the Trust Agreement.

Participating School District:

By: [*Columbia Falls Sc*] School District

Name: _____

Title: _____

Date: _____

By: Board of Trustees of the Bridged Health Alliance Trust

Name: _____

Title: _____

Date: _____

MULTIDISTRICT COOPERATIVE TRUST AGREEMENT
for the
BRIDGED HEALTH ALLIANCE TRUST

BRIDGED HEALTH ALLIANCE TRUST

THIS MULTIDISTRICT COOPERATIVE TRUST AGREEMENT (the "Trust Agreement") is established by the Trustees of the Bridged Health Alliance Trust and adopted by each Participating School District listed on Exhibit A, and is effective as of qualification by the Commissioner of Securities and Insurance once it satisfies the requirements described in Montana Code Section 20-3-366.

WHEREAS, Montana Code Section 20-3-366 allows the formation of a district health insurance trust by a multidistrict agreement pursuant to Montana Code Section 20-3-363;

WHEREAS, Montana Code Section 20-3-363 permits the boards of trustees of any two or more school districts to enter into a multidistrict agreement creating a multidistrict cooperative to perform any services, activities, and undertaking of the participating districts;

WHEREAS, under the 2025 amendment to Montana Code Section 20-3-363(7), a "multidistrict cooperative" means a public entity created by two or more school districts executing a multidistrict agreement with each other or with any other public or private entity participating in the cooperative;

WHEREAS, expenditures made in support of a multidistrict agreement may be made from the interlocal cooperative fund of each Participating School District under Montana Code Section 20-3-363;

WHEREAS, the Participating School District entered into the Multidistrict Agreement to form the Bridged Health Alliance Trust ("Trust") and pool risk by way of a self-insurance plan;

WHEREAS, the Trust intends to comply with these requirements and receive the incentive payment provided under Montana Code Section 20-3-369 to stabilize health insurance costs and capitalize operating reserves for the Trust; and

WHEREAS, the Trust shall sponsor the Bridged Health Alliance Plan ("Plan");

NOW, THEREFORE, the Trust is established as follows:

ARTICLE I
Definitions

Section 1.1. Agreement. This Trust Agreement.

Section 1.2. Board. The Bridged Health Alliance Trust Board of Trustees under this Trust comprised of the individual Trustees.

Section 1.3. Claims Administrator. The licensed third-party administrator appointed, in writing, by the Board to adjudicate Plan claims and provide various administrative services. The Claims Administrator must comply with all applicable state and federal laws and state licensing requirements.

Section 1.4. Health insurance benefits. Major medical insurance and excluding all excepted benefits as Montana Code Section 33-22-140(8) defines that term.

Section 1.5. Participating School District. A school district and any cooperative formed pursuant to Montana Code Sections 20-7-451 through 20-7-457 that has entered into a Participation Agreement.

Section 1.6. Participation Agreement. The agreement, signed by the Participating School District, so that the Participating School District can offer Plan benefits to Participants.

Section 1.7. Pharmacy Benefits Manager. The licensed pharmacy benefits manager appointed, in writing, by the Board to provide pharmacy benefit management services on behalf of the Plan. The Pharmacy Benefits Manager must comply with all applicable state and federal laws and state licensing requirements.

Section 1.8. Plan. The Bridged Health Alliance Benefit Plan.

Section 1.9. Participants. Employees as defined by Montana Code Section 20-3-366(6)(d) and their dependents.

Section 1.10. Stop-Loss Provider. The licensed stop-loss provider appointed, in writing, by the Board to provide stop-loss insurance or other reinsurance to the Plan. The Stop-Loss Provider must comply with all applicable state and federal laws and state licensing requirements.

Section 1.11. Trust. The Bridged Health Alliance Trust established to hold Plan assets and to pay Plan benefits and expenses.

Section 1.12. Trustees. The individual members of the Board.

Section 1.13. Trust Fund. The assets held under this Trust.

ARTICLE II
Purpose and Funding of Trust

Section 2.1 Establishment of the Trust. Upon transfer of contributions from the interlocal cooperative funds of the Participating School Districts and qualification by the Montana Commissioner of Securities and Insurance, the Trust is hereby established subject to the supervision and oversight of the Board of Trustees as provided for herein. If the Montana Commissioner of Securities and Insurance qualifies the Trust before July 1, 2026 and it begins operations before that date, the Trust will comply with all applicable rules subsequently adopted by the Montana Commissioner of Securities and Insurance pursuant to Montana Code Sections 20-3-366 to 370.

Section 2.2. Funding of the Trust. The Trust will accept the trust incentive payment provided for by Montana Code Sections 20-3-366 to 370 to stabilize health insurance costs and provide operating reserves as provided in Section 2.5. Participating School Districts and Participants will make contributions to the Trust in accordance with the terms of the Plan and the Participation Agreement. All such contributions and property, the investments made therewith, and proceeds thereof, and all earnings and profits thereon, less any payments or distributions which shall have been made by the Board pursuant to the terms of this Trust, are referred to herein as the "Trust Fund." The Trust Fund shall be held by the Trust and administered by the Board in accordance with the provisions of this Trust and applicable law.

The Trust expressly prohibits any preexisting health benefits trust or Participating School District from imposing its liabilities on the Trust at any time.

Section 2.3. Purpose. The Trust has been established for the purpose of providing self-insured health insurance benefits to Participating School Districts and Participants. Any public school district within the State of Montana may enroll for membership in the Trust. It is the intent of this Trust Agreement to adhere to all applicable guidelines and requirements set forth in Montana Code Sections 20-3-366 to 370, including any associated rules adopted by the state auditor, whether or not expressly incorporated into the terms of the Agreement.

Section 2.4. No Diversion. Except as otherwise provided herein and required by law, at no time prior to the satisfaction of all liabilities under the Plan shall the Trust Fund be used for or diverted to purposes other than to provide health insurance benefits for the exclusive benefit of Participants, except that any taxes and administration expenses for which the Trust is liable may be made from the Trust Fund. This limitation shall not prohibit the rebate of excess contributions, insurance premiums, or credits from the Trust based on the experience of the Participating School Districts. No Trustee, officer, employee, member of a committee, person connected with the Trust, or any individual or entity other than the State of Montana, a political subdivision thereof, or an entity the income of which is excludable from gross income under Section 115 of the Code shall receive, at any time, any of the net earnings or pecuniary profit from the Trust.

Section 2.5. Source of Trust Funds.

- (a) Upon the Trust's qualification by the state auditor, the Superintendent of Public Instruction will distribute a one-time \$40 million stabilization payment to the Trust as provided under Montana Code Section 20-3-369, which will be used solely to stabilize health insurance costs and capitalize an operating reserve for Participating School Districts.
- (b) Participating School Districts and Members will make contributions to the Trust in accordance with the terms of the Plan and Participation Agreement.
- (c) The Trust may also obtain insurance, such as reinsurance, stop loss or any other type of insurance necessary to defray liabilities of the Trust.
- (d) Nothing in this Agreement shall be construed to permit any commingling of any Trust Funds with other funds used to fund ancillary benefits offered under the Plan to Participating School Districts.

Section 2.6. Repayment of Initial Reserve. Beginning July 1, 2036, the Trust shall, as part of its annual actuarial analysis, identify, and report to the state auditor no later than 90 days following the completion of its annual audit, any excess reserves existing in the Trust. The Trust shall remit to the state any excess reserves identified under such actuarial analysis until the cumulative amounts remitted reaches \$40 million, as required under Montana Code Section 20-3-370. If the aforementioned actuarial analysis finds that no excess reserves exist in the Trust under Montana Code Section 20-3-370 and any associated rules developed by the state auditor, the Trust shall not remit any funds to the state.

Section 2.7. Tax Status. The Trust is intended to meet the requirements of Section 115 of the Internal Revenue Code.

Section 2.8. Taxes. All taxes of any and all kinds that may be levied or assessed under any applicable state or federal laws upon the Trust (excluding taxes, if any, upon benefits paid to Participants or their beneficiaries, heirs, executors, personal representatives, administrators or assigns) will be paid from the Trust Fund.

Section 2.9. Contributions. Each Participating School District shall make contributions to the Trust Fund for the Plan as specified from time to time by the Board (or such person acting on its behalf). However, the Board shall not change the amount of such required contributions within a plan year. A Participating School District may require Participants to pay a portion of such contributions. Neither the Trustees nor the Claims Administrator shall collect any amounts from such Participants. The Participating School District shall be responsible for collecting and paying the full amount of such contributions on a timely basis from their interlocal cooperative funds. The Board shall be under no duty to enforce payment of any contribution from Participants.

Section 2.10 Ancillary Benefits. The Board may also offer other ancillary benefits. The funds for such benefits shall have separate accounting and recordkeeping from the Trust Fund at all times. The Trust Fund may not be used to provide such ancillary benefits, and the provision of ancillary benefits shall not be permitted to interfere with or contravene the Trust's purpose of

providing self-insured health benefits. The Board plans to offer the following ancillary benefits: dental, vision, life insurance, short-term disability, long-term disability, employee assistance program, voluntary insurance benefits, critical illness and accident insurance, gap health insurance, legal insurance, identity theft insurance, and pet insurance.

ARTICLE III
Powers of Board

Section 3.1. Duties of the Board. The Board shall be responsible for administering the Plan and administering the Trust Fund. The Board may also offer ancillary benefits outlined in Section 2.10 to Participating School Districts and Participants. Subject to the limitations set forth in this Trust Agreement, the Board shall have sole and exclusive discretion in determining the benefits to be made available pursuant to the Plan, the extent to which the Participating School Districts may choose from among such benefits, and the extent to which such benefits shall be provided through contracts of insurance or on a self-insured basis. In no event shall the Plan provide for the payment of any benefit that would be inconsistent with the status of the Trust's qualification for exclusion from federal income taxation under Section 115 of the Code and Montana Code Sections 20-3-366 to 370.

The Board shall pay from the Trust Fund:

- (a) all premiums or other charges due with respect to any insurance contracts described herein;
- (b) all expenses reasonably incurred in the administration of the Plan or the Trust, which shall not exceed twelve (12) percent of total costs, as required under Montana Code Section 20-3-366;
- (c) all taxes of any kind assessed or levied against, or which are otherwise payable with respect to, the Trust Fund or any property included in the Trust Fund;
- (d) the reasonable compensation of the Claims Administrator, Pharmacy Benefits Manager, Stop-Loss Provider, and of any other person retained by the Trustees pursuant to this Agreement to perform services for the Plan or Trust;
- (e) any other expenses or amount properly payable pursuant to this Agreement; and
- (f) claims as incurred by Participants.

Section 3.2. Board's Powers. The Board is authorized and empowered:

- (a) to retain property constituting all or any part of the Trust held by it or to sell, exchange, convey, transfer, or otherwise dispose of any property constituting all or any part of the Trust held by it by private contract or at public auction. No person dealing with the Board will be bound to see to the application of the purchase

money or to inquire into the validity, expediency, or propriety of any such sale or other disposition;

- (b) to make commitments, either alone or in company with others, to purchase at any future date any property, investments, or securities as authorized under Section 3.4;
- (c) to give general or special proxies or powers of attorney with or without power of substitution, to exercise any conversion privileges, substitution rights, or other options, to consent to or otherwise participate in corporate reorganizations or other changes affecting corporate securities, to delegate discretionary powers and to pay any assessments or charges in connection with the foregoing, and generally to exercise any of the powers of an owner with respect to stocks, bonds, securities, or other property held in the Trust;
- (d) to make, execute, acknowledge, and deliver any and all documents of transfer and conveyance and any and all other instruments that may be necessary or appropriate to carry out the powers herein granted;
- (e) to register any investment held in the Trust in its own name or in the name of a nominee and to hold any investment in bearer form. The books and records of the Trustee will, at all times, show that all investments are part of the Trust;
- (f) to borrow for the benefit of the Trust, for such period of time and upon such terms and conditions as may be deemed proper, any sum or sums of money, and to secure such loans by mortgage or pledge of any property belonging to the Trust, without personal liability therefore;
- (g) to execute such deeds, leases, contracts, bills of sale, notes, proxies and other instruments in writing as will be deemed requisite or desirable in the proper administration of the Trust Fund;
- (h) to do all acts, take all actions, and exercise all rights and privileges, although not specifically mentioned in this Section, that the Board deems necessary to administer the Trust Fund, and to carry out the purposes of this Trust;
- (i) to employ such agents, actuaries, brokers, attorneys, accountants, custodians and financial counsel, investment managers and other persons that are necessary or desirable for the administration of the Trust Fund and to carry out the purposes of the Trust, and to pay their reasonable expenses and compensation;
- (j) to appoint the Claims Administrator to adjudicate Plan claims and provide various administrative services and to appoint the Pharmacy Benefits Manager to provide pharmacy benefits services;
- (k) to enforce all claims which may arise with respect to the Plan and the Trust and to institute appropriate proceedings of any nature to enforce such claims;

- (l) to waive, modify, reduce, compromise, release, settle, or extend the time of payment of any legal claim of whatever nature in favor of or against the Board or any part of the Trust Fund; and
- (m) to purchase reinsurance, stop loss or other forms of excess insurance, fidelity bonds, fiduciary liability insurance, and such other bonds or insurance as they may from time to time deem appropriate.

Section 3.3. Board Responsibilities. The Board shall:

- (a) determine the contributions to be made by the Participating School Districts pursuant to the Plan in consultation with the Trust actuary;
- (b) maintain accurate records of the contributions made by each Participating School District;
- (c) hold and administer such contributions for the purposes of the Trust Fund;
- (d) file such returns or reports with governmental agencies, including the Montana Commissioner of Securities and Insurance, as may from time to time be required by applicable laws;
- (e) enter into and maintain contracts with companies authorized to transact business and duly licensed in the State of Montana as it may select for the purpose of providing life insurance benefits, accident insurance benefits, and other program benefits pursuant to the Plan;
- (f) exercise all rights or privileges granted to the contract holder by the provisions of each such contract;
- (g) enter into any agreement with the insurance carriers for the alteration, modification, or amendment of any such contract; and
- (h) take any action respecting any such contract and the insurance provided thereunder as they may deem necessary or advisable.

Section 3.4. Investments. Subject to any restrictions imposed by applicable law, the Board will hold, invest, and reinvest Trust assets, keeping them invested as a single fund without distinction between principal and income, in any securities, bonds, notes, debentures, deposits, commercial paper, obligations of the United States government, stop-loss, and other insurance policies, or other investments, whether domestic or foreign, of any kind, class or character as the Board deems suitable for the Trust. Such investment and reinvestment will comply with any restrictions under applicable law.

The Board will have sole responsibility to account for earnings derived from its investment and reinvestment of the Trust. The Board may hold a reasonable portion of the Trust assets in cash pending investment or payment of Plan expenses or benefits. The Board will keep other cash earning at a reasonable interest rate in accounts in any banking or similar financial institution which is regulated by the United States or a State or in demand notes and interests in demand notes, Treasury Bills or short-term negotiable commercial paper. Additionally, the Board will adopt an investment policy statement to serve as a guide for the investment of Trust assets.

Section 3.5. Board Action. The Board will act by a majority vote of the Trustees. The Board may authorize any one or more Trustees to sign papers and instruments on behalf of the Board. The Board will act in accordance with this Agreement.

Section 3.6. Delegation. The Board may delegate its authority in writing to one or more Trustees or the Alliance for regular administrative and ministerial matters.

ARTICLE IV Discharge of Duties; Indemnification

Section 4.1. Fiduciary Standard of Care. The Board shall discharge its duties in the capacity of a fiduciary with respect to the Trust Fund solely in the interest of the Trust, Plan, Participating School Districts, and Participants and with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent man acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of like character and with like aims. The Board shall also have a duty of loyalty and act solely in the interest of the Trust, Plan, Participating School Districts, and Participants.

Section 4.2. Indemnification.

- (a) To the fullest extent authorized by law, and to the extent not otherwise covered by insurance, the Board shall be indemnified by the Trust against any and all liabilities arising by reason of any act, or failure to act, in relation to the Plan or the Trust, including without limitation, expenses reasonably incurred in the defense of any claim relating to the Plan or Trust, and amounts paid in compromise or settlement relating to the Plan or Trust, unless (1) it is established by a final judgment or a court of competent jurisdiction that such act or failure to act constituted gross negligence or willful misconduct, or (2) in the event of a settlement or other disposition of the claim, it is determined in a written opinion of legal counsel to the Plan or Trust that the act constituted gross negligence or willful misconduct.
- (b) To the fullest extent authorized by law, and to the extent not first covered by insurance or the Trust's indemnity set forth in Section 4.2(a), the Board, and the Participating School Districts shall be indemnified by the Participating School Districts against any and all liabilities arising by reason of any act, or failure to act, in relation to the Plan or the Trust, including without limitation, expenses reasonably incurred in the defense of any claim relating to the Plan or Trust, and

amounts paid in compromise or settlement relating to the Plan or Trust, unless (1) it is established by a final judgment or a court of competent jurisdiction that such act or failure to act constituted a breach of fiduciary duty, gross negligence or willful misconduct, or (2) in the event of a settlement or other disposition of the claim, it is determined in a written opinion of legal counsel to the Plan or Trust that the act constituted a breach of fiduciary duty, gross negligence or willful misconduct.

ARTICLE V
Recordkeeping, Expenses, and Reporting

Section 5.1. Records and Accounts. The Board will maintain accurate and detailed records and accounts of all properties of the Trust and all investments, receipts, disbursements, and other transactions under this Agreement. Such records and accounts shall clearly delineate funds related to self-insured health insurance benefits from any ancillary benefits offered under the Trust. All the accounts, books, and records of the Trust will be open at all reasonable times to inspection and audit by any Trustee, the Claims Administrator, the Montana Commissioner of Securities and Insurance, any governmental agency having jurisdiction over the Trust, or any Participating School District. The Trust shall maintain full control over claims data for medical and pharmacy benefits and make the data available to Participating School Districts on request in compliance with the Health Insurance Portability and Accountability Act of 1996.

Within 60 days following the close of each fiscal year of the Trust, and at such other times as determined by the Board, the Board will make available to Participating School Districts a written report setting forth all investments, receipts, disbursements, and other transactions carried out by the Trust during the period. The report will include a listing of Trust Fund assets and the fair market value of the Trust Fund assets at the end of the period. The Board shall file copies of such annual financial and actuarial reports with the Montana Commissioner of Securities and Insurance.

Section 5.2. Compensation and Expenses. Each Trustee will be entitled to reasonable compensation for services rendered for the provision of health insurance benefits to the Trust and to reimbursement of all reasonable and necessary taxes and expenses. Such expenses include reasonable fees for agents, attorneys, accountants, custodians and other persons rendering services to the Trust with the approval of the Board and incurred in connection with the discharge of its responsibilities under this Trust Agreement. If an individual who already receives full-time compensation from a Participating School District is serving as Trustee, such individual will not receive compensation from the Trust except for reimbursement of expenses properly and actually incurred. Any such compensation and reimbursement will be paid from the Trust Fund unless paid directly by the Participating School District.

Administrative costs shall not exceed twelve (12) percent of total costs, as required and defined under Montana Code Section 20-3-366.

Section 5.3. Plan Documents. The Board shall furnish descriptive materials, such as the Summary Plan Description, to each Participating School District and the Montana Commissioner

of Securities and Insurance accurately outlining the health insurance benefits and ancillary benefits available to Participants through the Trust. Such documents shall include the terms and conditions of coverage.

Section 5.4. Annual Financial Report. On or before each plan year beginning after the second full year of providing health insurance benefits to Participants, the Board shall prepare a report for each Participating School District detailing the cost rate, contribution rate, adjusted contribution rate, and the medical index rate of each school district and employee group, as described in Montana Code Section 20-3-367(2)(a). The Board shall file copies of each report with the Montana Commissioner of Securities and Insurance.

Section 5.6 Plan of Operation. The Board shall provide the Montana Commissioner of Securities and Insurance with a plan of operation to ensure the financial integrity of the Trust Fund.

ARTICLE VI Participating School Districts

Section 6.1. Authorized Parties. Each Participating School District shall furnish the Board with a written list of the names, signatures, and extent of authority of all persons authorized to direct the Board and otherwise act on behalf of the Participating School District with respect to the Plan, under the terms of this Agreement. All persons so authorized are referred to herein individually as an "Authorized Party" and collectively as "Authorized Parties." The Board shall be entitled to deal with any Authorized Party so identified by the Participating School District until notified otherwise in writing.

Section 6.2. Participation. Any public school district in the State of Montana may enter into a Participation Agreement with the Trust to adopt the Plan and this Trust Agreement. In no event shall a school district become a Participating School District until such time as it executes Participation Agreement in the form approved by the Board.

Section 6.3. Reports and Records. Each Participating School District shall prepare and submit such reports as may from time to time reasonably be required by the Board. The books, records, and accounts of each Participating School District which are in any way related to the Participating School District's participation in the Plan or the Trust shall, at all reasonable times, be open to inspection by the Board and the Claims Administrator, and by any authorized representative of either.

Section 6.4. Pro Rata Assessment; Liability. Each Participating School District agrees to make all contributions required of it pursuant to this Agreement. In addition, pursuant to Montana Code 20-3-366(2)(c) and 368(2)(a), each Participating School District agrees that it is subject to pro rata assessment by the Board for all liabilities of the Trust. If a Participating School District fails to make any such contribution or pay any such assessment, or fails to provide the Board with any report, or with access to its records, as required of it hereunder, or fails to give the Board timely written notice of its withdrawal from the Plan, the Trustees shall take such actions as they may deem appropriate under the circumstances. Such Participating School District shall

pay all of the costs reasonably incurred by the Board in taking such actions, including reasonable attorneys' fees.

ARTICLE VII

Amendment and Termination of the Trust or Participating School Districts

Section 7.1. Amendment of the Trust. The Board may amend this Trust Agreement. No amendment shall cause Trust Funds to be used to provide benefits other than health insurance benefits or adversely affect the exempt status of the Trust or any of statutory criteria required to qualify the Trust under 20-3-366. Any amendment shall become effective upon receipt by the Board of the instrument of amendment and endorsement thereon by the Board of its consent thereto, if such consent is required.

Section 7.2. Termination of the Trust. Any permitted termination shall become effective upon the receipt by the Board of the instrument of termination. When dissolving the Trust either voluntarily or due to violation of Montana Code Section 20-3-366(1) for more than three (3) consecutive years, the Board shall wind up the affairs of the Trust in the following order:

- (a) impose any assessments on the Participating School Districts that are calculated by the Trust's retained actuary as necessary to pay all liabilities of the Trust;
- (b) pay all remaining claims, including incurred but not reported claims;
- (c) pay all remaining liabilities of the Trust;
- (d) return any reserve balance remaining from the distribution of state funds to the trust under Montana Code Section 20-3-369(3) to the state of Montana for deposit in the state general fund. The portion of the reserve balance attributable to the distribution of state funds must be determined by an actuarial reserve balance analysis conducted by an actuary chosen by the state auditor.
- (e) distribute its remaining net assets, if any, proportionately to the Participating School Districts pursuant to the contractual terms of coverage and membership in the Trust. A Participating School District shall deposit in an internal service account and spend the funds in accordance with Montana Code Sections 20-3-330 or 20-3-331.

Upon termination, no part of the Trust will be distributed, transferred, conveyed, delivered, or paid to an entity that is not the State of Montana, political subdivision of Montana, or an entity the income of which is excludable from its gross income Section 115 of the Code.

Section 7.3. Participating School District Withdrawal. As required under Montana Code Section 20-3-367, a Participating School District that voluntarily joins the Trust may not withdraw from the Trust unless:

- (a) the Participating School District has participated in the Trust for at least five (5) consecutive school fiscal years; or
- (b) the Participating School District has an inflation gap factor equal to or greater than 1.5, after which such district or group may withdraw from the Trust upon the conclusion of the plan year in which the Trust reports an inflation gap factor to the district or employee group above 1.5 (or an inflation gap factor meeting or exceeding the requirements under any enacted amendment to Montana Code Section 20-3-367).

To complete its withdrawal, the Participating School District shall notify the Board in writing of its intent to withdraw no later than one hundred and eighty (180) days prior to its actual termination date. Such withdrawal will be effective at the end of the plan year following such notice period, unless the Participating School District has an inflation gap factor equal to or greater than 1.5 as described in Section 7.3(b) above, in which case, the Participating School District may withdraw from the Trust effective upon the conclusion of the plan year as long as notice is provided prior to the end of such plan year. Within seven (7) days of receiving a Participating School District's notification of its intent to withdraw, the Board shall notify the Montana Commissioner of Securities and Insurance that the Participating School District intends to withdraw from the Trust.

The Participating School District may rescind its notice of intent to withdraw unless otherwise barred by the applicable provisions of the Trust Agreement. Following a withdrawal under this section, such a school district:

- (a) is ineligible to rejoin the Trust for at least five (5) full school fiscal years following the year in which the district withdraws;
- (b) is ineligible for receipt of any portion of the net assets or reserve balance of the Trust attributable to the distribution of funds under the stabilization payment created by Montana Code Section 20-3-369 on withdrawal; and
- (c) shall reimburse the Trust for the run-out liability of the withdrawing district or employee group. Such liability consists of all claims of the withdrawing district or employee group that were incurred by the Participants of the Participating School District or employee group prior to the effective date of the Participating School District's or employee group's withdrawal.

Section 7.4. Participating School District Termination. A Participating School District's participation in the Trust shall remain in effect unless terminated by the Trust for cause as determined by the Board, including but not limited to nonpayment, late payment, or disparagement. In such an event, the Trust may void Participating School District's participation in the Trust and all obligations of the Trust to the Participating School District. Such termination will be effective upon the later of either the first of the month after the date of the termination notice, or ten (10) days after the date of the termination notice. Termination does not relieve the Participating School District of its financial commitments hereunder.

ARTICLE VIII
Election, Resignation or Removal of Trustee

Section 8.1 Election of Trustee. The Participating School Districts will elect eleven Trustees to serve on the Board. In addition to the eleven elected Trustees, the Montana state auditor or the auditor's designee shall be an ex officio nonvoting member of the Board as required under Montana Code Section 20-3-366. In the interest of maintaining a broad representation of different geographic areas and school district sizes, the eleven elected Trustees shall include six representatives of the AA districts, and the remaining five representatives will be from districts of all other sizes (A, B, C and independent elementary districts).

Section 8.2 Board Elections. The Trust shall solicit interest from Participating School Districts to determine a list of nominees to serve as Trustees ahead of Board elections. The Trust shall put forth a ballot for such elections annually, or in the event of a Board vacancy, and shall distribute one ballot to each Participating School District for each such election.

Section 8.3 Term of Office. The term of a Trustee will be three (3) years, or until his or her successor is elected and qualified, if later. The terms of approximately one-third of the Trustees will expire each year to permit the terms of Trustees to overlap. Accordingly, the terms of the initial Trustees will be staggered, with one-third having an initial term of three (3) years, one third having an initial term of two (2) years, and the remainder having an initial term of one (1) year. There is no limit on the number of terms a Trustee may serve. The initial year for the initial Trustees will begin upon the Trust's qualification by the state auditor.

Section 8.4 Removal. The Board, acting by a majority, may remove a Trustee by providing that Trustee a thirty-day advanced written notice.

Section 8.5 Resignation. A Trustee may resign by giving thirty (30) days advance written notice to the Board. The Board may waive this notice requirement.

Section 8.6 Successor Trustee. On the removal or resignation of a Trustee, or the expiration of a Trustee's term, a successor will be elected by Participating School Districts pursuant to Section 8.2. The successor Trustee will have the same rights, duties, powers, and immunities as the predecessor Trustee being succeeded. Any resigning or removed Trustee will execute all documents and do all acts necessary to vest the rights, duties, and powers in the successor Trustee. If for any reason the Participating School Districts do not elect a new Trustee(s), as in this Trust Agreement, the remaining Trustees will constitute the Board. If no Trustees remain, the last resigning or removed Trustee may apply to a court of competent jurisdiction for the appointment of a successor Trustee or for instructions. Any expenses as a result of the Trustee's application to a court of competent jurisdiction will be paid as an expense of administration from the Trust Fund.

Each successor Trustee will demonstrate acceptance of this Trust by executing this Trust agreement or an addendum to this Trust agreement. A resigning or removed Trustee will transfer and deliver all of the assets of the Trust to the successor Trustee.

ARTICLE IX
Miscellaneous

Section 9.1. Action by the Participating School District. Whenever the Participating School District is required or authorized to take any action hereunder or to give any directions to the Board, such action or directions shall be taken by such officer or officers of the Participating School District as shall be duly authorized under Section 6.1.

Section 9.2. Assignment. This Trust Agreement will not be assigned by either party without the prior written consent of the other party. The provisions of this Trust Agreement are for the sole and exclusive benefit of the parties hereto, and no third-party beneficiary is intended or will be entitled to rely hereon.

Section 9.3. Benefit. This Trust Agreement is made solely for the benefit of the parties hereto, their respective successors, heirs, personal and legal representatives, and permitted assigns. No other person will acquire or have any right by virtue of this Agreement.

Section 9.4. Board not Liable for Duties not Assigned Herein. The duties of the Board to any Participating School District are limited to those assumed by the Board by the terms of this Trust Agreement and the Participation Agreement.

Section 9.5. Complete Agreement/Amendment. Except as expressly provided herein, this document and any attachments or exhibits contains the entire agreement between the parties and supersedes any prior discussions, negotiations, representations, or agreements among them respecting the subject matter. Except as provided in Section 7.1 of this Agreement, no additions or other changes to this agreement will be made or be binding unless made in writing and signed by each party to this agreement.

Section 9.6. Governing Law. To the extent permitted by applicable law, the Trust shall be administered, construed, and enforced according to the laws of the State of Montana.

Section 9.7. Headings. Headings and numbers in this Agreement are included for convenience of reference only. If there is any conflict between any of the numbers and headings and the text of this Trust Agreement, the text will control.

Section 9.8. Insurers. With respect to any insured benefits offered by the Plan, the insurance carriers issuing insurance contracts shall be solely responsible for the payment of all benefits payable pursuant to such contracts and for the deciding of claims for such benefits. Neither the Board, Trustees, Trust, Claims Administrator, nor any Participating School District, shall be liable in any manner for the payment of any such benefits or the deciding of any such claims.

Section 9.9. Non-Alienation of Benefits. No rights or claims to any of the monies or other assets of the Trust Fund shall be assignable, nor shall such rights or claims be subject to garnishment, attachment, execution or levy of any kind. Any attempt to transfer, assign or pledge the same shall not be recognized by the Board.

Section 9.10. Severability. In case any provision of this Trust Agreement shall be held illegal or invalid for any reason, the illegality or invalidity shall not affect the remaining provisions of this agreement, but shall be fully severable. The Trust Agreement shall be construed and enforced as if said illegal or invalid provisions had never been inserted herein. This Trust Agreement supersedes and replaces any prior agreements with respect to the subject matter hereof.

IN WITNESS WHEREOF, the parties hereto have caused this Trust Agreement to be executed by their respective officers thereunto duly authorized as of the day and year written below.

Barb Riley, Chair of the Trustees of the BRIDGED
HEALTH ALLIANCE TRUST

DATE: _____

By: _____
[NAME]

ATTEST: _____



Canvass of Votes and Declaration of Results

TO BE FILED IN ELECTION OFFICE

CANVASS OF VOTES CAST AT THE November 4, 2025 General Obligation Bond levy ELECTION COLUMBIA FALLS High School District SD6

OFFICE	NAME of CANDIDATE/ISSUE	PRECINCT/ DISTRICT/ WARD	NUMBER OF VOTES	TOTALS
	High School District General Obligation Bond Levy			
		FOR the Levy	1,469	
		AGAINST the Levy	3,148	
				4,617

STATE OF MONTANA
County of Flathead

We hereby certify that this constitutes a full, true and complete canvass of the number of votes cast, and declaration of results in each precinct/ward/district of School District Six for the offices/issues enumerated and we hereby declare nominated/elected the individuals listed receiving the highest number of votes.

Attest my hand and the seal of said County, hereto affixed this ____ day of _____, 20 ____.

Signature of Election Administrator

CERTIFICATE OF ELECTION FOR PROPOSITION

High School District Facility Improvement Project General Obligation Bond Election
\$ 84,800,000

To the Flathead County Superintendent:

We, the undersigned trustees, certify that the taxpayers of School District No. Six of Flathead County, State of Montana, on 4th day of November, 2025, voted on the following proposition:

High School District Facility Improvement Project General Obligation Bonds \$84,800,000

Number of votes for: 1,469

Number of votes against: 3,148

Trustee Name: Jill Rocksund

Trustee Signature: _____

Trustee Name: Barbara Riley

Trustee Signature: _____

Trustee Name: Amanda Pacheco

Trustee Signature: _____

Trustee Name: Keri Hill

Trustee Signature: _____

Trustee Name: Casey Heupel

Trustee Signature: _____

Trustee Name: Heather Mumby

Trustee Signature: _____

Trustee Name: Megan Upton

Trustee Signature: _____

Trustee Name: Justin Cheff

Trustee Signature: _____

The proposition was thereby approved or disapproved.

*Signatures of Trustees of Columbia Falls School District No. Six

DATED this 10th day of November, 2025.

Canvassed results must be published once in a newspaper that will give notice to the largest number of people of the district. Send the certificate to the entity ordering the election within 15 days of the election, 20-20-416, MCA.

**Substitute Hires
Nov 2025**

Teacher

LNAME	FNAME	Teacher
Natelson	Deborah	Teacher or Aide
Goodman	Danielle	Teacher or Aide
Frissell	Beatrix	Teacher or Aide
Paradise	Niki	Teacher or Aide
McIntosh	Ernesta	Aide
		Teacher or Aide
		Teacher or Aide
		Teacher or Aide
		Teacher or Aide
		Teacher or Aide

Secretary / Nurse

LNAME	FNAME	Other
		Nurse
		Nurse
		Secretary

Bus Driver

LNAME	FNAME	Other
		Bus Driver
		Bus Driver
		Bus Driver

Hot Lunch

LNAME	FNAME	Other
		Hot Lunch

Custodian

LNAME	FNAME	Other
		Custodian

11/4/2025