10.20.104 ANTICIPATED UNUSUAL ENROLLMENT INCREASE - ANB CALCULATION

(1) School district trustees may apply to the Superintendent of Public Instruction for increased ANB for unusual elementary or high school enrollment increases that exceed the lesser of 4% or 40 students of the enrollment in the fiscal year prior to the year for which the increase is requested. Elementary district and high school district calculations are always separate. In the case of a K-12 district, make separate enrollment calculations for the elementary and high school levels of the K-12 district.

(2) The eligibility for ANB for the ensuing school fiscal year due to anticipated unusual elementary or high school enrollment increases will be computed as follows pursuant to 20-9-314, MCA:

(a) Estimate the district's anticipated enrollment for the next October count using information known to be accurate at the time the estimate is made. By budget unit: [(estimated enrollment for first Monday in October) - (estimated kindergarten enrollment for students receiving less than 180 hours of pupil instruction time per school year) - (one-half estimated kindergarten enrollment for students enrolled in a half-time kindergarten program and receiving 180 hours or more of pupil instruction time per school year) - (estimated part-time enrollment for students in grades FTK through 12 receiving less than 180 hours of pupil instruction time per school year) - (0.75 times the part-time estimated enrollment for students in grades FTK through 12 receiving 180 through 359 hours of pupil instruction time per school year) - (0.50 times the estimated part-time enrollment for students in grades FTK through 12 receiving 360 through 539 hours of pupil instruction time per school year) - (0.25 times estimated part-time enrollment for students in grades FTK through 12 receiving 540 through 719 hours of pupil instruction time per school year) - (estimated enrolled students reaching 19 years of age by September 10 of the school year) - (0.50 times estimated students enrolled in MT youth challenge)]. This is anticipated enrollment (AE).

(b) Determine the adjusted and averaged enrollment counts for October and February of the current school year using the calculation in ARM 10.20.102(16)(a)(i). The average of the October and February adjusted enrollment counts is current year enrollment (CYE).

(c) Determine the anticipated enrollment increase (AEI) by subtracting the current year enrollment from the anticipated enrollment. AEI = AE - CYE.

(d) Determine the anticipated increase in enrollment as a percentage of the current year enrollment by dividing the AEI calculated in (2)(c) by the current year enrollment. AEI divided by CYE = % increase.

(e) If the anticipated increase in enrollment calculated in (c) exceeds 40 students or, if the anticipated increase in enrollment as a percentage of the current year enrollment calculated in (d) exceeds 4%, the Superintendent of Public Instruction shall approve the district's use of the AEI as determined in (3) in place of the current ANB for purposes of determining general fund payments and budget limitations in accordance with 20-9-311, MCA, to establish the ensuing year's BASE funding program and entitlement calculations in accordance with 20-9-314(5), MCA.

(3) The increased current ANB for the ensuing fiscal year will be calculated as follows:

(a) Determine the increase based on a percentage of the current year enrollment:

(i) Determine AEI in excess of 4% of CYE. AEI - (.04 x CYE). Round to nearest hundredth (.xx).

(ii) Determine AEI for each budget unit by subtracting CYE by budget unit from AE by budget unit. AEI by budget unit = AE by budget unit - CYE by budget unit. If the district has only one budget unit, go to (a)(iv).

(iii) Prorate anticipated enrollment increase exceeding 4% of CYE among the district's budget units by:

(A) calculating the ratio of AEI for each budget unit as calculated in (a)(i) to the total AEI for the district calculated in (2)(c); and

(B) multiplying AEI in excess of 4% of CYE (AEI - (.04 x CYE)) by the ratio calculated in (a)(iii)(A) for each budget unit within the district. Round to the nearest hundredth (.xx).

(iv) Add the CYE by budget unit and the AEI in excess of 4% by budget unit as calculated in (a)(iii)(B).

(b) Determine the increase based on number of students:

(i) Determine AEI for each budget unit by subtracting CYE by budget unit from AE by budget unit.

(ii) Add the CYE by budget unit and the AEI by budget unit.

(c) The greater of (a)(iv) or (b)(ii) is the increased enrollment.

(d) Multiply the increased enrollment calculated in (c) by the total of PI days and PIR days approved for the current year and divide by 180 for each budget unit. Round the ANB up to the nearest whole number. This figure is used as current ANB for purposes of ARM 10.20.102(16) in determining general fund payments and budgeting limitations for the district.

(4) In accordance with 20-9-314(6), MCA, the Office of Public Instruction reviews the ANB of a district that used anticipated enrollment figures, as follows:

(a) ANB is recalculated in accordance with (2), using actual enrollment as of the first Monday in October in place of the anticipated enrollment.

(b) If the ANB recalculated in (a) based on the actual October enrollment equals or exceeds the ANB calculated in (3)(d), the anticipated unusual enrollment increase materialized and the district is entitled to the increased BASE funding and entitlements approved by the Superintendent of Public Instruction in (2)(e).

(c) If the ANB recalculated in (a) based on the actual October enrollment is less than the ANB calculated in (3)(d), the anticipated unusual enrollment increase did not materialize and the Superintendent of Public Instruction makes the following adjustments:

(i) the district's general fund budget of the current year will be adjusted, as needed, to comply with legal limitations and requirements using the higher of the ANB recalculated in (4)(a) or (4)(c) in place of the current ANB that was used when determining the budget for the year; and

(ii) state aid will be adjusted to reflect the amount which should be paid on the district's adjusted budget.

Authorizing statute(s): 20-3-106, 20-9-102, MCA

Implementing statute(s): 20-9-166, 20-9-311, 20-9-314, MCA

History: NEW, 1992 MAR p. 214, Eff. 2/14/92; AMD, 1994 MAR p. 1824, Eff. 7/8/94; AMD, 1996 MAR p. 2168, Eff. 8/9/96; AMD, 2000 MAR p. 632, Eff. 2/25/00; AMD, 2006 MAR p. 3070, Eff. 12/22/06; AMD, 2008 MAR p. 1692, Eff. 8/15/08; AMD, 2016 MAR p. 880, Eff. 5/21/16.