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OPEN LETTER TO THE MONTANA REPUBLICAN PARTY STATE CENTRAL COMMITTEE

On the Meaning of "Funding Follows the Child to Homeschool Options" Under the Platform Adopted June 13, 2026

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To: The Chairman and Members of the Montana Republican Party State Central Committee

Date: 06/15/2026 (Revision 6)

Chairman and Members of the Committee:

I write as a Republican candidate who will run on the Platform of the Montana Republican Principles adopted by this Committee on June 13, 2026, as an Army veteran, as a Montana small business owner, and as a homeschool father of six. The Platform you adopted is the strongest pro-parent, pro-family, pro-local-control document this Party has produced in my lifetime, and I am proud to stand on it.

I write today because two provisions of that Platform must be read together, and the way they are read will determine whether Montana homeschoolers' forty-year freedom survives the 2027 legislative session.

The first provision is Core Policy Priority #6 (Education):

"We must reduce over-centralized control, protect local governance of schools, and preserve the autonomy of private and home schools; therefore, we support school choice and policies that let funding follow the child. Parents have the primary right and responsibility to direct their children's education."

The second is the K-12 Education section's School Choice and Funding plank:

“Preserve open enrollment and policies allowing students to attend their parents’ school of choice; ensure education funding follows the child to public, private, charter, or homeschool options.”

These provisions must be read together. Core Priority #6 first commits the Party to preserve the autonomy of private and home schools, and then — because of that commitment — supports school choice and policies that let funding follow the child. The premise and the conclusion travel together. The K-12 School Choice and Funding plank should therefore be implemented in a way that advances school choice without converting Montana homeschool families from autonomous parent-directed educators into state-funded program recipients.

The purpose of this letter is to demonstrate that — under the Platform’s Statement of Principles’ textual-fidelity instruction — only one reading of “funding follows the child to homeschool options” is fully harmonious with the Platform as a whole. That reading is broad-based tax relief reaching every Montana taxpayer, paired with access to existing public school infrastructure, not treasury disbursement through Education Savings Accounts, vouchers, refundable tax credits, or allotments.

I also write because the Statement of Principles commits the State Party to issue “a report on the voting results for those standards for each Legislator.” Platform-scoring is now official Party practice. Legislators voting in 2027 will be scored against the School Choice plank, and they deserve a clear interpretation before the votes, not after.

The Statement of Principles’ Own Instruction

The Statement of Principles adopted June 13, 2026, contains a sentence of significant interpretive weight:

“We affirm the principles stated in this document are the foundation of our conservative values, are rooted in respect for the United States Constitution interpreted in its original form rather than as a fluid document, and the Montana state Constitution.”

The Platform tells us, in its own opening, that it is to be read as the U.S. Constitution is to be read: textually, originally, and as a coherent whole — not as a fluid document whose isolated phrases can be repurposed against its other commitments. That instruction binds us. We cannot honor the Statement of Principles while reading the K-12 School Choice plank in isolation from Core Priority #6 or from the rest of the Platform.

When we read all of it together, only one interpretation harmonizes.

What Montana Homeschoolers Have Today

Before walking through the platform analysis, the Committee should know exactly what “autonomy of home schools” — the express premise of Core Priority #6 — currently protects.

Under MCA 20-5-109 and 20-5-111, a Montana homeschool parent has four obligations:

1. Once a year, notify the county superintendent that you are homeschooling. No form is required. No permission is asked. No birth certificate is demanded.

2. Keep an attendance record and make it available to the county superintendent on request.
3. Provide the same minimum hours of instruction the public schools provide.
4. Provide an organized course of study in the subject areas required of public schools.

That is the entire list. Montana statute then states that the parent is “solely responsible” — that exact word — for the educational philosophy, curriculum, textbooks, methods, time, place, and evaluation of every child’s instruction. Montana law requires only an attendance record, kept by the parent and available to the county superintendent on request; it does not require state curriculum approval, state testing, teacher certification, routine home visits, or routine submission of instructional records.

This is the “autonomy of home schools” the Platform commits to preserve. It is one of the most unregulated homeschool frameworks in America, and it has been defended in this Party’s name for four decades. The Montana Coalition of Home Educators defeated state-testing bills in 1991, 2003, 2005, and 2007. In May 2025, HB 778 — drafted with MCHC’s Steve White and HSLDA’s Kevin Boden — made the law freer still, removing the homeschool immunization-record and building-compliance requirements and separating home schools from nonpublic schools within MCA 20-5-109. The bill passed third reading in the House 99-0 and in the Senate 50-0, with HSLDA reporting “several proponents and no opponents” at the Senate Education Committee hearing.

We have held this ground for forty years by following one rule: don’t take the government’s money. That rule is what the Platform’s commitment to “preserve the autonomy” now obliges the Party to defend.

The Platform Read as a Whole

The Platform contains the Ten Core Policy Priorities, eleven detailed policy sections, and the K-12 Education provisions. Eight separate provisions of that Platform independently point in the same direction on the School Choice plank’s interpretation.

Core Priority #6 — Education (the Governing Principle)

The premise — “preserve the autonomy of private and home schools” — is the governing principle for the entire Education section. Every implementing plank, including School Choice and Funding, should serve that premise rather than undermine it.

Every state that has implemented an ESA program for homeschool families has compromised homeschool autonomy in one or more of these documented ways:

Arizona makes ESA participation legally distinct from filing a homeschool affidavit and bars concurrent district or charter enrollment, while allowing some public-school services as purchased services through ESA accounts. ESA families sign annual state contracts, route spending through ClassWallet, and submit to spending audits — a regulatory relationship Montana homeschoolers do not have.

Florida treats the Personalized Education Program as distinct from home education. A home-education student receiving PEP funds must file a written notice terminating their home-education

program, must submit an annual student learning plan to the scholarship-funding organization, and must submit annual norm-referenced test results.

West Virginia places traditional home instruction in subsection (c) of its compulsory-attendance statute, while Hope Scholarship participation is separately addressed in subsection (m). Subsection (m) also requires WVEIS entries for Hope notices and, for individualized instructional-program recipients, annual test results or academic-progress determinations. In 2023, HB 3408 sought to eliminate that separation and treat homeschool families and Hope recipients under a single, more regulated framework — a reversal of the firewall that was only two years old.

Tennessee's Education Freedom Scholarship is not a direct benefit for independent homeschool status; it operates through registered Category I, II, or III non-public schools and requires EFS-registered schools receiving EFS funds to ensure students in grades 3 through 11 take either a nationally standardized achievement test or TCAP each year of EFS enrollment.

Utah cut homeschoolers' Utah Fits All amounts in 2025 by simple statutory amendment two years after launch. HB 455 prohibited certain expenses (season tickets, ski passes, furniture, and apparel) and capped physical-education and extracurricular expenses at 20 percent each. The committee report supports a home-based award structure of \$4,000 for ages 5–11 and \$6,000 for ages 12–18, compared with \$8,000 for private-school students.

None of these mechanisms preserves the autonomy of home schools as Montana currently understands it. Each compromises that autonomy as a direct consequence of accepting the funding. Any Montana implementing legislation that produces these results runs counter to the premise of its own governing Core Priority.

Core Priority #1 — Tax Policy

The Platform commits the Party to “low, broad-based, easily understood taxes; minimize taxes to restrain government growth and protect economic freedom.”

An ESA program — or a refundable tax credit paying cash from the treasury — is a new state spending category requiring a new disbursement bureaucracy, a new vendor-approval system, a new audit function, and ongoing legislative appropriations. It expands government rather than restraining it.

A non-refundable tax credit or deduction reduces what a family OWES the state, uses the existing tax-filing system, adds no new bureaucracy, and restrains government growth.

Reading A creates direct tension with Tax Policy. Reading B harmonizes with it.

Core Priority #2 — Role of Government

The Platform commits the Party to government that “must remain constitutionally limited, with separation of powers, federalism, and unalienable rights preserved.”

A statewide ESA program is, by its nature, an expansion of state government into a sphere where the State currently has no operational role. The Office of Public Instruction has no operational authority over Montana homeschool families today beyond the bare notification under MCA 20-5-109. An ESA program would require OPI (or a new contracted administrator) to enroll families, approve vendors, process

spending, audit accounts, hear appeals, and write rules — each a new state function exercised over a private educational sphere.

Tax relief requires no new state function. Reading B better harmonizes this plank with the Education priority.

Core Priority #3 — Scope of Government

The Platform commits to the principle that “political and economic freedom are indivisible and must be protected together. A free people require both free markets and free institutions.”

This principle warns against creating economic dependencies that compromise political freedom. When the State pays a family \$5,000 to \$8,000 per child, those families become economic clients of the State. The political independence of the homeschool community — the source of its forty-year legislative success — is compromised at the moment the first check is cashed. Reading A creates direct tension with this principle.

Core Priority #4 — Sanctity of Life

This Core Priority contains the most important interpretive principle in the Platform for present purposes. It commits the Party to “prohibit taxpayer funding of abortions and assisted suicides.”

The Committee did not write that plank in isolation. It wrote it because the Platform accepts a principle that runs throughout: taxpayer funding of a private activity is itself a category of legitimate conservative concern. Taxpayer funding does not merely subsidize an activity — it entangles the State with it, creates a regulatory interest in it, normalizes it within the budget, and shapes the private liberty that defined it.

If the Platform recognizes this principle in the context of abortion, the same principle applies to homeschooling for identical reasons. Once taxpayer dollars flow to homeschool families, the State acquires a legitimate regulatory interest in how those dollars are spent — and Montana Article VIII, Section 12 demands “strict accountability” of every dollar in the treasury. This plank’s own logic weighs against Reading A.

The Taxation and Transportation Section

The Platform’s separate Taxation and Transportation section sharpens the Tax Policy priority in language directly relevant to the ESA question:

“Keep taxes minimized, broad-based, fair, and easy to understand, never as tools to redistribute wealth or manipulate behaviors of the citizens.”

An Education Savings Account — by design — uses tax revenue to incentivize specific educational behaviors. It is a behavioral incentive tool created by tax policy. The Platform explicitly disfavors this use of the tax system.

The Taxation section also commits to:

“Support lower taxes achieved through tax reform and reduction of government regulation, spending, and waste. Return surplus revenue to Montana taxpayers to restrain government growth.”

The Platform itself provides the answer to the fairness question that opponents of my position raise — what about childless taxpayers, empty-nesters, and grandparents who fund the school system without using it? The platform-compliant answer is: return surplus revenue to Montana taxpayers. Not create a new entitlement that benefits only households with school-age children. This section, on its face, points toward Reading B.

The Business, Labor, and Economic Development Section

The Platform commits the Party to:

“Limit government’s role to services the private sector cannot provide. Stop governmental picking of winners and losers.”

An ESA program funds families with school-age children while taxing childless taxpayers, retired empty-nesters, and seniors on fixed incomes who fund the program without benefiting. That is the textbook concern this plank addresses. Reading A creates direct tension with this plank.

The K-12 Education Section’s Own Other Planks

The K-12 Education section contains additional planks that further constrain its School Choice provision:

Parental Rights: *“Affirm parents’ God given authority and responsibility for their children’s education, including the right to transparent access to curriculum, instructional materials, and student data (with strict limits on biometric or intrusive personal data collection).”*

ESA programs in every state collect detailed spending data, curriculum data, vendor data, and assessment data on every participating family — far more data than the State currently sees from any Montana homeschool family. The “strict limits on intrusive personal data collection” language is in tension with the data-collection regimes that every operational ESA program requires.

Local Control: *“Uphold the constitutional authority and duties of locally elected school boards under state law, opposing federal and state overreach (including excessive mandates, DEI directives, or union influence on curriculum and operations).”*

A statewide ESA administered by OPI or a contracted state-level vendor moves administrative authority away from locally elected school boards toward a centralized state-level disbursement function. By contrast, Reading B — strengthened partial enrollment under MCA 20-5-102 and extracurricular protection under MCA 20-5-112 — works through locally elected school boards, which is exactly what this plank protects.

Efficiency and Transparency: *“Reduce excessive administrative paperwork for superintendents and ensure full transparency in budgets, programs, and data practices to restore focus on classroom results.”*

ESA programs ADD administrative paperwork — annual contracts, expenditure receipts, audit responses, curriculum documentation. Reading A creates exactly the bureaucratic burden this plank seeks to eliminate.

The Local Government and Land Use Section

The Platform commits the Party to:

“Require a minimum level of voter participation and approval as defined by the Legislature, in general elections for tax and significant public-funding increases.”

A statewide ESA program, at scale, is a “significant public-funding increase” by any reasonable measure. The Platform’s own commitment requires voter participation and approval at a threshold defined by the Legislature. Any implementing legislation that bypasses that requirement is in tension with this Platform provision.

The Harmonious Reading of the K-12 School Choice Plank

When the School Choice plank is read in harmony with Core Priority #6 and the seven other Platform provisions above, one reading clearly emerges.

“Education funding follows the child to homeschool options” is best implemented through:

1. Non-refundable tax credits and deductions for educational expenses across the lifespan, available to homeschool families, families using public, private, and charter schools, postsecondary and workforce students, professionals maintaining licensure through continuing education, grandparents and family members contributing to a child’s education, and adults pursuing literacy, GED, or citizenship preparation. The qualifying expense categories shall include K-12 instruction, postsecondary tuition, trade and apprenticeship programs, professional licensure and continuing education, intergenerational educational contributions, and adult basic education.

This honors Core Priority #6 (preserves homeschool autonomy because no state oversight attaches to families keeping their own money), Tax Policy (restrains government growth), Role of Government (requires no new state function), Sanctity of Life’s logic (no taxpayer funding flowing out of the treasury), the Taxation and Transportation section (lowers taxes across the board rather than incentivizing a specific demographic), Business and Labor (does not pick winners and losers — available to every Montanan who pays for education at any stage of life, not only to households with current K-12 students), Parental Rights (no data-collection regime), Local Control (operates through existing tax administration), and Local Government (does not constitute a new spending category requiring voter approval).

2. Strengthened access to existing public school infrastructure through MCA 20-5-102 partial enrollment and MCA 20-5-112 extracurricular protection. Local school boards already administer this. Homeschool children can already participate in public-school courses, activities, and Montana High School Association sports under existing law — and MCA 20-5-112 already bars a principal’s verification of homeschool academic eligibility from including student assessment. Honoring the K-12 School Choice plank by strengthening partial enrollment — clarifying MHSA eligibility, requiring districts to accept homeschool transcripts at face value, and standardizing partial-enrollment access statewide — delivers genuine school choice through the local governance the K-12 Local Control plank protects.

3. General tax relief that addresses the legitimate “double taxation” concern through lower property and income taxes and the return of surplus revenue per the Taxation and Transportation section, reaching every Montana taxpayer regardless of family composition.

Sections 1 and 3 together form a single coherent tax-relief architecture. The lifetime-learning credit reaches educational expenses for every Montanan who invests in education at any stage of life — children, students, working adults, professionals, immigrants, and grandparents. The surplus-revenue refund and property and income tax reductions reach everything else. Together they ensure that every Montana taxpayer benefits from the Party's commitment to tax restraint, not only households with school-age children. The fairness concern raised against funded school-choice programs — that they create a benefit for one demographic at the expense of another — does not arise here, because the benefit class is, by design, the entire Montana taxpaying public.

This reading harmonizes every plank. It achieves the school-choice goal. It preserves the forty years of homeschool autonomy MCHC has built. It is consistent with Cato's firewall principle: school-choice programs should not collapse traditional homeschooling into a state-funded regulatory category.

Three Objections That Must Be Answered

I have engaged in dozens of conversations with thoughtful Republicans about this plank since June 13. Three objections come up repeatedly. Each deserves a direct answer, because each will be raised against legislators in 2027.

Objection One: "But It's Voluntary."

The single sentence I hear most is, "If a homeschool family doesn't want the money, they don't have to take it."

That sounds reasonable. It is not how government programs actually work in American history. The pattern is consistent enough to merit study: programs created as voluntary tend to become mandatory at maturity, and the rules surrounding them tend to expand.

Social Security: When the 1935 Act passed, the public was told the program was limited insurance covering specific worker categories. Agricultural workers, domestic servants, and the self-employed were excluded. Within a generation those exclusions were gone. Medicare Part A is technically "voluntary" — but you cannot decline it without forfeiting your Social Security retirement benefits. The Social Security Number was printed for decades with the words "FOR SOCIAL SECURITY PURPOSES — NOT FOR IDENTIFICATION." That language was later removed; the SSN is now the closest thing America has to a national ID. The 12.4 percent payroll tax applies to wages up to \$184,500 in 2026.

Federal income tax: Ratified in 1913 with a top marginal rate of 7 percent on income over \$500,000 (about \$16 million today), applying to roughly the top 3 percent of earners. By 1918 — five years later — the top rate had reached 77 percent and the base had expanded dramatically.

REAL ID: State driver's licenses began as a credentialing system for vehicle operation. The Real ID Act of 2005 made them part of a federal identification framework. As of May 2025, domestic air travel requires a REAL ID-compliant identification or another acceptable document such as a U.S. passport.

Common Core State Standards: Adopted by 46 states between 2010 and 2012. Federal Race to the Top funding heavily favored states that adopted common standards. Conservative states spent the

following decade trying — mostly unsuccessfully — to repeal what they had adopted under fiscal pressure.

No Child Left Behind: Federal Title I funding for low-income schools brought federal testing mandates and federal sanctions. There is no Title I school in America that operates outside federal testing requirements today.

The ObamaCare individual mandate: Upheld in *NFIB v. Sebelius* (2012) on the theory that the “penalty” for refusing to buy insurance was a “tax.”

The pattern is recognizable. A voluntary program creates a constituency that depends on it, a bureaucracy that administers it, and a regulatory framework that grows. Within a generation the “voluntary” choice has effectively narrowed.

The mechanism by which voluntary becomes binding is itself worth naming. A voluntary program requires a permanent administrative apparatus to distinguish participants from non-participants — to enroll, verify, audit, and police the boundary. That apparatus, once built, develops institutional interests in its own expansion. Legislators who inherit the program two decades later see a bureaucracy already in place and ask the natural follow-up question: why are we administering this for some families but not all? The voluntariness of the original program is what makes the bureaucracy necessary; the bureaucracy is what makes the eventual expansion more likely.

Homeschool funding can follow the same arc. The Montana homeschooler who refuses ESA money in 2027 may, by 2040, find themselves operating under a regulatory regime designed around ESA recipients — managed by a bureaucracy that came into being to administer the “voluntary” program.

Objection Two: “Won’t ESA Money Improve Our Access to Public-School Programs?”

A second objection deserves direct engagement, because it captures the most appealing case for homeschool inclusion: shouldn’t homeschool families who currently pay extra for music, sports, debate, or drivers’ education welcome a program that finally gives us a fair share of what we have been paying for?

The answer requires understanding the moral and legal frame Montana homeschoolers currently occupy — and the way ESA participation changes that frame.

Today, Montana homeschoolers are stakeholders in the public school system, not supplicants. We pay property taxes directly (if we own homes) or indirectly (through rent). Property taxes are the primary funding source for Montana K-12 education. We have already bought our share of the local school district. Partial enrollment under MCA 20-5-102 and extracurricular access under MCA 20-5-112 are not charity extended to us by the district — they are us collecting on the investment we already made. The current legal and political position of the homeschool family is clean: we paid in, and we are using a portion of what we paid for.

The moment a homeschool family takes ESA money, that frame shifts. The family is no longer purely a taxpayer drawing on what they bought — the family is now also a state-funded recipient. The political question shifts from “should taxpayers be able to use what they paid for?” to “should funded recipients also draw from district resources?” The first question we win cleanly. The second question we can lose,

because public school unions, school administrators' associations, and many general-public voters will see ESA recipients drawing on partial enrollment as double-dipping.

The state-by-state record shows what happens when this political pressure is resolved:

Arizona makes ESA participation legally distinct from a homeschool affidavit and bars concurrent district or charter enrollment, while allowing some public-school services to be purchased through the ESA account. ESA families are no longer homeschoolers under state law; they are scholarship students with a different legal status and a different set of obligations.

Florida's PEP program treats participating families as distinct from home-education families, requires a written notice terminating home-education status, and requires submission of annual learning plans and norm-referenced test results to the scholarship-funding organization. Florida does preserve some access (interscholastic activities, dual enrollment), but the legal status of the family has changed and new reporting obligations apply.

Utah's 2025 HB 455 capped physical-education and extracurricular expenses at 20 percent each and prohibited expenses such as season tickets, ski passes, furniture, and apparel — treating extracurriculars as part of the funded package rather than as separate access through the local district.

Tennessee's EFS program is not a direct benefit for independent homeschool status. It operates through registered non-public schools, and EFS-registered schools must ensure students in grades 3 through 11 take a nationally standardized achievement test or TCAP each year of EFS enrollment.

The pattern is consistent: funded families operate under a different legal classification and additional reporting requirements that do not apply to unfunded families. Whether access is technically preserved, restricted, or eliminated varies by state — but the change in status is universal.

There is a second, related concern that compounds this change. A voluntary ESA program — one in which some Montana homeschool families participate and others do not — requires a permanent classification and monitoring bureaucracy to maintain the boundary between funded and unfunded homeschoolers. That bureaucracy must exist at both levels of government:

At the state level, the Office of Public Instruction or a contracted administrator must maintain a registry of ESA recipient families, verify continued eligibility, audit spending, approve vendors, and report participation data. None of this exists today.

At the local level, every Montana school district must develop new policies for partial-enrollment applicants who are also ESA recipients. Districts must verify ESA status, handle disputes and appeals, manage mid-year status changes, and track families with mixed funded/unfunded children. None of this infrastructure exists today, because there are currently no funded homeschool families in Montana.

The moment we create funded homeschoolers, we create the need for the infrastructure. Once the infrastructure exists at every local district, it accumulates functions and expands. That is how bureaucracies behave.

The voluntariness of the program is what makes the bureaucracy necessary. A mandatory program would place every homeschool family in a single administrative category. A voluntary program requires permanent capacity to distinguish the volunteers from the non-volunteers, in every district, in every transaction with the school system, in perpetuity. “It’s voluntary” is not a defense against this bureaucracy. It is the cause of it.

This local-level bureaucratic expansion creates direct tension with three Platform provisions read together: the K-12 Education > Local Control plank’s opposition to “federal and state overreach... including excessive mandates”; the K-12 Education > Efficiency and Transparency plank’s commitment to “reduce excessive administrative paperwork for superintendents”; and Core Priority #2’s requirement of “constitutionally limited” government. None of these are formally violated by an ESA, but each is materially weakened.

The practical answer is the one Montana already provides. Under MCA 20-5-102 and MCA 20-5-112, Montana homeschool children can already participate in public-school courses, activities, and Montana High School Association sports. We do not need an ESA to play football, run track, take chemistry lab, join the band, or take drivers’ education. If the Committee wants to improve homeschool access to extracurriculars, the platform-compliant tools are statutory and local:

1. Strengthen and standardize the partial-enrollment provisions of MCA 20-5-102 so access does not depend on which county a family lives in.
2. Clarify MHSA eligibility for homeschool students to remove the procedural friction that currently limits participation in some districts.
3. Require school districts to accept homeschool transcripts at face value for partial-enrollment purposes.

Each of these expands homeschool access through the local school boards the K-12 Local Control plank already commits to protect. None requires sending government money to homeschool families. None creates a new state or local bureaucracy. None reclassifies any homeschool family. And all of it is consistent with the existing taxpayer-stakeholder frame: we paid for the school, we are entitled to use a portion of it.

Objection Three: “If Homeschoolers Get Funding, So Should I.”

A third objection deserves an honest answer. If homeschool parents receive ESA money for educating their own children, why shouldn’t childless taxpayers, retired empty-nesters, and grandparents — all of whom fund the public school system through property and income taxes without using its services — also receive money?

The Platform itself answers this question, and the harmonious reading above answers it directly. Two answers travel together.

First, the Taxation and Transportation section commits the Party to “return surplus revenue to Montana taxpayers to restrain government growth.” That is the platform-compliant response to “double taxation”: general tax relief for everyone who paid in. Not a new entitlement that benefits only households with current K-12 students.

Second, the lifetime-learning structure of Reading B's tax credits and deductions is, by design, available to the same Montanans the ESA leaves out. The 72-year-old widow taking a class at Helena College qualifies. The grandmother contributing to her grandchildren's homeschool curriculum claims the credit on her own return. The 50-year-old electrician renewing his journeyman license qualifies. The immigrant pursuing GED or citizenship preparation qualifies. The 35-year-old paramedic maintaining continuing-education credits qualifies. The class of beneficiaries is not "households with school-age children." It is every Montanan who invests in education at any point in life.

A non-refundable tax credit or deduction reduces what a family OWES the state. It is YOUR money, never collected. When the Montana District Court reviewed the case that became *Espinoza v. Montana Department of Revenue* (2020), the trial court reasoned that a tax credit "concerns money that is not in the treasury and not subject to expenditure." It is not an "appropriation" under Montana's Constitution. The state does not become a stakeholder in your education because the state never had the money in the first place.

A REFUNDABLE tax credit, an ESA, a voucher, or an allotment is fundamentally different. It is money the state has collected from all taxpayers, deposited in the treasury, and then disbursed to specific recipients. Under Montana Article VIII, Section 12, every dollar in the state treasury demands "strict accountability." That accountability clause is exactly what gives the Legislature, OPI, and the courts a legal hook to regulate how the money is used.

A homeschool ESA does not solve the "double taxation" problem. It creates a third-rail constituency that will fight to protect its own benefit, against the very empty-nesters and seniors who funded it. The platform-compliant conservative answer is the dual structure of Reading B: lower the taxes, return the surplus, and let every Montanan keep more of their own money for education at every stage of life.

If Reading A Advances Anyway: The Minimum Statutory Firewall

I am realistic. Some legislators will, despite this letter, propose ESA or voucher or refundable-credit programs that include homeschool families. If that happens, the Platform's other principles still demand specific statutory firewalls. The Texas Legislature provides the model: in the same session in which it passed universal ESAs (SB 2), it also passed the Homeschool Freedom Act (HB 2674), which bars the Texas Education Agency, State Board of Education, and covered educational institutions from adopting rules or policies regulating a homeschool educational program. SB 2 itself includes a nonparticipating-homeschool provision stating that program requirements do not apply to home-schooled students who are not participating in the program.

Any Montana implementing legislation that touches homeschool families must contain, at minimum:

- 1. Separate statutory category.** Homeschool families receiving program funds shall not be classified under MCA 20-5-109. They shall be in a separate, parallel exemption from compulsory attendance, with no shared statutory definitions.
- 2. Non-regulation clause.** No state agency may promulgate any rule or impose any requirement on a family operating under MCA 20-5-109 as a condition or consequence of the program. The text of the Texas Homeschool Freedom Act provides the model language.

3. Statutory bar on rulemaking touching MCA 20-5-109. OPI, the Board of Public Education, and any program administrator shall be prohibited from adopting rules that interpret, modify, or apply to MCA 20-5-109 or 20-5-111.

4. Mandatory sunset and review. The program shall sunset every four years, requiring affirmative legislative reauthorization. At each review, the Education Interim Committee shall report on any documented regulatory creep affecting non-participating homeschool families.

5. Enrollment preservation. Families participating in the program shall retain full access to MCA 20-5-102 partial enrollment, MCA 20-5-112 extracurricular participation, MHSA eligibility, and public-school course access on the same terms as non-participating homeschool families. Any local school board policy excluding participating families from these protections shall be preempted by state law.

6. Data minimization consistent with the Platform. Consistent with the K-12 Education > Parental Rights plank's "strict limits on biometric or intrusive personal data collection," no implementing administrator shall collect personal, biometric, curriculum, or assessment data from participating families beyond the minimum necessary for fund disbursement.

7. Local administrative burden limit. No state agency may impose verification, registry, or reporting requirements on local school districts that exceed a Legislature-set administrative-burden cap, consistent with the K-12 Education > Efficiency and Transparency plank.

8. Voter approval where required. Consistent with the Local Government and Land Use section's voter-approval requirement for "significant public-funding increases," any program exceeding a Legislature-set threshold shall require voter approval.

These are not preferences. They are the minimum required to harmonize implementing legislation with the Platform's other planks. A bill that lacks any of these provisions cannot, in good faith, be called platform-compliant.

The Ask

I respectfully ask the State Central Committee to:

1. Adopt an interpretive resolution at its next meeting affirming that, for families operating under MCA 20-5-109 and MCA 20-5-111, "education funding follows the child to homeschool options" should be implemented through non-refundable tax credits and deductions for educational expenses across the lifespan (covering K-12 instruction, postsecondary tuition, trade and apprenticeship programs, professional licensure and continuing education, intergenerational educational contributions, and adult basic education), broad-based tax reduction or surplus refunds reaching every Montana taxpayer, and strengthened access to public-school courses, activities, and extracurricular participation under MCA 20-5-102 and MCA 20-5-112. Any proposal involving direct treasury disbursement, refundable credits, ESAs, vouchers, or allotments for home-based education should be required to include express statutory firewalls protecting non-participating homeschool families, preserving equal access to partial enrollment and extracurricular participation, and barring state agencies from using the program to regulate families operating under Montana's existing homeschool statutes.

2. Direct Republican legislators that votes against direct-funding ESA programs that include homeschool families should be scored as platform-consistent under the harmonious reading, since such programs create direct tension with Core Priority #6 (homeschool autonomy), Core Priority #1 (low taxes, restraining government growth), Core Priority #2 (limited government), Core Priority #3 (free institutions), Core Priority #4's underlying logic (taxpayer funding as a category of concern), the Taxation and Transportation section (taxes never as tools to redistribute or manipulate behavior), the Business and Labor section (no picking of winners and losers), the K-12 Parental Rights plank (strict limits on data collection), the K-12 Local Control plank (no state overreach), the K-12 Efficiency and Transparency plank (reduce paperwork), and the Local Government section (voter approval for significant public-funding increases).

3. Consult the Montana Coalition of Home Educators and the Home School Legal Defense Association on any implementing legislation that affects homeschool families. MCHE's Steve White and HSLDA's Kevin Boden helped draft HB 778 in 2025 and are the Party's natural partners on this issue.

4. In the event direct-funding legislation advances anyway, require the eight statutory firewall provisions specified above as a condition of Party endorsement. The Texas model (SB 2 paired with the Homeschool Freedom Act, same session) is the minimum acceptable architecture.

Closing

The June 13 Platform is the strongest pro-parent, pro-family, pro-local-control education platform this Party has adopted in my lifetime. I am proud to run on it.

Read as a coherent whole — as the Statement of Principles' textual-fidelity instruction requires — the Platform is also the strongest pro-homeschool-autonomy document this Party has produced. Core Priority #6 commits the Party to “preserve the autonomy of private and home schools” as the premise on which school choice rests. The Taxation and Transportation section commits the Party to using taxes for revenue, not behavior. The Business and Labor section commits the Party against “picking winners and losers.” The K-12 Parental Rights plank commits the Party to strict limits on intrusive data collection. The K-12 Local Control plank commits the Party against state overreach. The K-12 Efficiency and Transparency plank commits the Party to reducing administrative paperwork. The Local Government section commits the Party to voter approval for significant public-funding increases.

Each of those provisions is a guardrail. Read together, they describe a coherent conservative architecture for school choice in Montana — one that uses tax relief and expanded access rather than treasury disbursement, one that delivers that tax relief broadly enough — to families, students, workers, professionals, immigrants, and grandparents alike — that no demographic is left funding the program without benefiting from it, one that preserves local school board authority rather than centralizing administration in Helena, and one that protects homeschool families from the status change that has accompanied homeschool funding in every state that has crossed this line.

Montana homeschoolers today stand on the strongest possible ground: we are taxpayers using a portion of what we already paid for. ESA participation would trade that ground for a recipient status that brings, in every operational state, a different legal classification and additional reporting requirements. The

Platform commits us to preserve what we have. The harmonious reading is the way to keep that commitment.

The choice before this Committee is not whether to support school choice. The Platform commits us to that. The choice is how to implement school choice in a way that honors Core Priority #6's premise as well as its conclusion.

I am asking the Committee to adopt the harmonious reading before the 2027 Legislature opens, before the first ESA bill is dropped, and before the first Montana homeschool family is asked whether a \$5,000 check is worth forty years of freedom — and the partial-enrollment access that comes with it.

There is a way to deliver school choice to every Montana family — public, private, charter, and homeschool alike — and to deliver real tax relief to every Montana taxpayer at every stage of life. It is the path the Platform itself describes when read as a whole. It is the platform I will run on, vote on, and ask my colleagues to honor.

With respect, and in service of Montana families,

John J. Looney Sr.

Republican Candidate, Montana House District 81

Homeschool Father of Six | U.S. Army Veteran

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Cc: MTGOP Chairman; Senate and House Republican Caucus Leadership; Education Plank Committee; Steve White, Montana Coalition of Home Educators; Kevin Boden, Home School Legal Defense Association; LC4 Coalition Candidates