



## Education Interim Committee

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### 65th Montana Legislature

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TO: Education Interim Committee  
FROM: Pad McCracken, Committee Staff  
RE: Shared Policy Goals for Education  
DATE: August 3, 2017

I wanted to provide you some introduction/explanation of the following documents related to the Shared Policy Goals for Education, which were previous collaborative efforts involving legislative interim committees that focused on two basic questions:

- What should the goals be for Montana's public education systems (and schools)?
- How can successful progress toward those goals be measured?

During the mid-2000s, the Postsecondary Education Policy and Budget (PEPB) Subcommittee of the Education and Local Government Interim Committee (ELG) worked with the Board of Regents of Higher Education to develop a set of Shared Policy Goals and Accountability Measures (SPGs) for the Montana University System.

Following two resolutions adopted by the 2009 Legislature, a subcommittee of the 2009-2010 ELG joined with representatives from state education agencies to develop additional SPGs for the K-12 education system and the K-20 education system. The resolutions aimed to "advance interagency cooperation and the quality of education policymaking."

The 2011-2012 ELG briefly reviewed and reaffirmed these non-binding agreements, but recommended an in-depth review of the SPGs by the 2013-2014 ELG. The 2013-2014 ELG formed a subcommittee to conduct this review. The 2015-2016 ELG did not address the SPGs and the agreements are no longer in effect.

I am including the documents listed below as background for your August 22 committee meeting at which you will learn more about Montana's ESSA Plan for K-12 education and the MUS Strategic Plan both of which share elements with the previous SPGs.

1. Shared Policy Goals for K-12. This agreement was last signed in 2012. It focused on graduation rates, schools meeting regular accreditation, the creation and usage of a K-12 data warehouse (GEMS), and improving student achievement in struggling schools.
2. The Final Report of the 2013-2014 Shared Policy Goals Subcommittee. This is the most recent work related to the Shared Policy Goals. The document includes a summary of the subcommittee's work, recommendations, and the agreements for the Montana University System and the K-20 education system.



## Education and Local Government Interim Committee

### 62nd Montana Legislature

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## SHARED POLICY GOALS AND ACCOUNTABILITY MEASURES FOR THE K-12 PUBLIC EDUCATION SYSTEM 2015 BIENNIUM

This document on shared policy goals and accountability measures represents a merging of the following efforts that involved leaders from the legislature, the executive and the K-12 public education system during the 2009-2010 interim:

- Board of Public Education strategic goals and objectives
- Superintendent of Public Instruction strategic goals and objectives
- Shared policy goals and accountability measures development by the Education and Local Government Interim Committee (ELG) Subcommittee on Shared Policy Goals.

The document was reviewed by the 2011-2012 ELG and relevant agencies.

The documentation for these efforts provides important background, history and context for these shared policy goals and accountability measures, in particular the shared commitments to prepare students for success in the 21st century, to improve teaching and student learning, to improve student achievement in struggling schools, and to increase public awareness and engagement in the K- 12 educational system.

This document is nonbinding. The ELG shall review, update, approve, and renew this understanding each biennium with the Board of Public Education and Superintendent of Public Instruction so that it may become the basis of state public policy in regard to the K- 12 education system.

As a statement of public policy goals for public education in Montana, this document reflects the ELG's commitment to a basic system of free quality public elementary and secondary schools such that funding high quality education is a critical goal of the State of Montana. This document, in conjunction with the definition of a basic system of free quality public elementary and secondary schools established in section 20-9-309, MCA, will provide the policy direction needed to maintain a free quality elementary and secondary education system in Montana.

The authors of this document urge that it, along with 20-9-309, MCA, be used by the legislature in the 2013 legislative session to frame education budget initiatives and other policy recommendations for the 2015 biennium.

**K-12 Shared Policy Goals, Objectives, and Accountability Measures  
2015 Biennium**

Shared Policy Goals	Objectives	Accountability Measures
1. Prepare students with the knowledge and skills necessary for success in the 21st century society.	1.1. Increase Montana's high school graduation rate.	By June 30, 2013, increase by 2 percent the number of students who graduate in 4 years with a regular high school diploma.
	1.2 Review the ARM rules that govern accreditation, certification, and professional educator preparation programs on a regular cycle.	By June 30, 2013, increase by 2% the number of schools meeting regular accreditation standards using 2011/2012 school year as a baseline
2. Improve teaching and student learning by promoting data-driven policy decisions and access to educational information.	2.1 Develop a statewide longitudinal data system to collect and report reliable and timely data on Montana K-12 students.	By June 30, 2013, the K-12 education data warehouse will be established as the single source of information for reporting and analysis of K-12 student level data collected by the OPI as measured by the number of reports produced from the data warehouse.
	2.2 Improve access to K-12 education data by educators, policymakers, and the public.	By June 30, 2013, educators, policymakers, and the public will have access to data in the data warehouse through standardized reports and ad hoc query tools in accordance with the access rights established for the individual accessing the data as measured by the number of categories of users.
3. Improve student achievement in struggling schools.	3.1 Provide learning supports and promote greater community engagement to increase student achievement in schools identified as struggling.	The number of schools served by the Statewide System of Support that show an increase in student achievement as measured by the statewide student assessment (criterion-reference test) using the 2009-10 school year as a baseline.

<p>4. Increase public awareness of and engagement in the K-12 educational system recognizing the roles and responsibilities of state and local educational agencies and the legislature.</p>	<p>4.1 Promote coordination collaboration among the K-12 education agencies recognizing the constitutional roles of the Board of Public Education, the Montana Legislature, and school districts.</p>	<p>Progress shall be measured by continuous improvement in attaining the identified accountability measures in the K-12 education shared policy goal agreement.</p>
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**K-12 SHARED POLICY GOALS**

WHEREAS, Article VIII, section 12, of the Montana Constitution vests in the Legislature the responsibility to ensure strict accountability of all revenue received and spent by the state, counties, cities, and towns and all other local governmental entities, and Article X, section 1, requires the Legislature to fund and distribute in an equitable manner to the school districts the state's share of the cost of the basic elementary and secondary school system; and

WHEREAS, Article X, section 9, of the Montana Constitution vests in the Board of Public Education the general supervision of the public school system; and  
 WHEREAS, section 20-3-106, MCA, grants supervision over certain aspects of the public schools and districts of the state to the Superintendent of Public Instruction; and

WHEREAS, Article X, section 8, of the Montana Constitution states that the elected board of trustees in each school district shall exercise supervision and control of schools in the district; and

WHEREAS, agencies of the education community have increasingly, and to positive effect, shared leadership between themselves and with the Education and Local Government Interim Committee; and

WHEREAS, an understanding of shared policy goals and accountability measures for the K-12 public education system, shared by the Superintendent of Public Instruction, the Board of Public Education, and Education and Local Government Interim Committee, represents an important advance in interagency cooperation and the quality of education policymaking; and

WHEREAS, shared policy goals must be systematically tied to accountability measures in order to ensure timely and effective implementation of policies; and

WHEREAS, the Education and Local Government Interim Committee Subcommittee on Shared Policy Goals and Accountability Measures, comprised of four legislators and education agency partners, with representatives from the Board of Public Education and the Office of Public Instruction, has identified statewide public elementary and secondary education policy goals and accountability measures for the K-12 public education system, in collaboration with the education agency partners;

This UNDERSTANDING crafted by the Education and Local Government Interim Committee, the Office of Public Instruction, and the Board of Public Education, identifies the statewide public elementary and secondary education policy goals and related accountability measures (see pages 1-2 above) that will be used as a policy goal setting and assessment tool for

policymakers, the K-12 education system, and the public in evaluating the achievement of the policy goals; and that will be used, in conjunction with 20-9-309, MCA, as a guide to drive decision packages and funding mechanisms for the state funding that is appropriated to the K- 12 education system by the Montana State Legislature.

Furthermore:

1. The K-12 education system shall prepare a Shared Policy Goals and Accountability Measures Report presenting appropriate and current data for these goals and accountability measure in an easy-to-read format.
2. This report shall be presented to the House and Senate Education Committees and the Joint Appropriations Subcommittee on Education by the 10th legislative day of the 63rd Legislature.
3. This report shall be posted to the Board of Public Education, Office of Public Instruction, and Education and Local Government Interim Committee websites by January 1 each odd numbered year.

The signatures below denote that the signatories fully participated in and support the shared policy goals and accountability measures cited herein.

This document expires June 30, 2015.

Dated this 18th day of June, 2012.

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Representative Elsie Arntzen, Chair

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Patty Myers, Chair  
Board of Public Education

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Gary Branae, Vice Chair

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Denise Juneau, Superintendent  
Office of Public Instruction

**FINAL REPORT**  
**of the**  
**EDUCATION AND LOCAL GOVERNMENT INTERIM COMMITTEE**  
**SUBCOMMITTEE ON SHARED POLICY GOALS FOR EDUCATION**  
**2013-2014 INTERIM**

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By Padraic McCracken, Legislative Research Analyst

September 2014

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## Introduction and Background

The Montana Constitution includes the goal of establishing “a system of education which will develop the full educational potential of each person.”<sup>1</sup> The responsibility for providing, funding, supervising, governing, and controlling this system is then divided among a number of different constitutional entities, including the Legislature, the Board of Regents, the Board of Public Education (BPE), the Superintendent of Public Instruction, and school district trustees. This shared responsibility can produce tension between and among these different entities—at times a constructive tension and at other times a less constructive tension. Different approaches have been tried over the years to foster healthier relationships among these entities.

Prior to the 1999 legislative reorganization of interim committees and the creation of the Education and Local Government Interim Committee (ELG), there was a Joint Committee on Postsecondary Education Policy and Budget (PEPB), which helped ensure dialogue between the Board of Regents and the Legislature. For several interims following the creation of ELG, PEPB was maintained as a subcommittee of ELG. During these interims, shared policy goals and accountability measures for the Montana University System (MUS) were developed by the subcommittee. In 2009, the Legislature passed two resolutions (HJ 6 and SJ 8) urging representatives of the education entities and the Legislature to establish similar shared policy goals and accountability measures for K-12 and K-20. The resolutions aimed to advance “interagency cooperation and the quality of education policymaking.”

The 2009-2010 ELG created a subcommittee that developed three shared policy goal documents for MUS, K-12, and K-20. The 2011-2012 ELG briefly reviewed and reaffirmed these nonbinding agreements but recommended an in-depth review of the SPGs by the 2013-2014 ELG early in the interim, involving all of the stakeholders who developed the original documents.

The 2013-2014 ELG discussed the status of the shared policy goals at its September 2013 meeting and then appointed the Subcommittee on Shared Policy Goals for Education at its December 2013 meeting. The subcommittee met three times beginning in February 2014. This report provides a summary of the subcommittee’s work. Audio minutes and meeting materials are available via the [2013-2014 ELG website](#).

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<sup>1</sup> Montana Constitution, Article X, Section 1(1).

## **Subcommittee Members, Signatory Representatives, and Staff**

### Legislator members

Representative Kris Hansen, Chair

Representative Edie McClafferty

Senator Eric Moore

Senator Sharon Stewart-Peregoy

### Signatory Representatives

Madalyn Quinlan, OPI Chief of Staff, representing the Superintendent of Public Instruction

Tyler Trevor, Deputy Commissioner for Planning and Analysis, representing the Commissioner of Higher Education and the Board of Regents

Pete Donovan, BPE Executive Director, representing the Board of Public Education

### Staff

Pad McCracken, Research Analyst, Legislative Services Division

Laura Sankey, Attorney, Legislative Services Division

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## **Meeting Dates**

February 3, 2014

April 10, 2014

June 16, 2014

## Meeting Summaries

Audio minutes and written minute logs were kept for each meeting and are available on the [2013-2014 ELG website](#). The following summaries are intended only to capture the main areas of discussion.

February 3, 2014

All subcommittee members and signatory representatives were present. Superintendent of Public Instruction Denise Juneau also attended this first meeting.

Following the call to order, roll call, and introductions, members briefly discussed the background and purpose of the shared policy goals. Staff provided a background brief as well as a compilation of “Education Goals, Duties, and Definitions” taken from the Montana Constitution and statutes. The discussion indicated consensus that developing these goals was valuable. Chair Hansen recognized that while the goals are shared, there will be variations in policy strategies advocated by the signatory entities. The signatory parties agreed with that assessment of the process. Staff reviewed the subcommittee process emphasizing that only legislator subcommittee members would vote on motions and that the subcommittee’s role was to provide a report back to the full ELG.

Mr. Trevor reviewed the MUS Strategic Plan and pointed out its alignment with the current MUS Shared Policy Goals document. He pointed out that the three overarching goals are:

1. Access, Affordability, and Student Success;
2. Workforce and Economic Development; and
3. System Efficiency and Effectiveness.

Mr. Trevor reviewed the goals, objectives, and metrics under each of these three broad goals and answered member questions throughout the review.

The subcommittee then turned its attention to the K-20 Shared Policy Goals and Superintendent Juneau provided the review of that document. Data related to the accountability measures indicated that improvements are being made in:

1. Remediation rates;
2. College Participation;
3. Distance learning availability and participation; and
4. Data linkages between K-12 and MUS.

Members had questions related to the progress of students who are not ready for college and those interested in entering the workforce out of high school. The Superintendent responded that initiatives like EdReady (an online resource for helping students identify and address weaknesses in math in order to avoid remediation) and the Montana Career Information System (MCIS;

administered by the Department of Labor) were helping to address those concerns. The subcommittee requested an overview of MCIS at a subsequent subcommittee meeting.

Mr. Trevor addressed questions about remediation, and explained that MUS is in the midst of an effort to reform its approach to developmental education. He also explained that concurrent enrollment, dual enrollment, and dual credit could all be seen as under the umbrella of “early access” to college.

Members asked about privacy issues related to data collection and Mr. Trevor responded that everyone took this issue very seriously and adhered to state and federal laws related to student data privacy.

Superintendent Juneau then reviewed the K-12 Shared Policy Goals which focus on:

- Graduation rates;
- School accreditation status;
- Data system improvement;
- Student success in schools identified as struggling; and
- Public awareness and engagement.

Again, the accountability measures indicated that progress is being made in all goal areas. Superintendent Juneau then distributed a draft document describing OPI’s strategic directions for 2013-2016. The three main goals on this document are to:

- Ensure that students graduate prepared for college and careers;
- Raise American Indian student achievement; and
- Improve the health and well-being of students.

Members expressed interest in “farm-to-school” programs as well as issues related to school safety.

Following the K-12 item, the subcommittee determined to proceed with a review of these shared policy goal documents and to “piggyback” subcommittee meetings with scheduled ELG meetings to be most efficient. Members discussed the time required for this review as well as different approaches, including the possibility of utilizing conference calls if needed between face-to-face meetings.

#### April 10, 2014

Senators Moore and Stewart-Peregoy were unable to attend the April meeting. A number of other visitors were present to participate in scheduled presentations.

As part of the discussion of K-12 goals, the subcommittee heard two reports on rule revision efforts. Deputy Superintendent Dennis Parman updated members on revisions to ARM Title 10, Chapter 57, on Educator Licensure. Mr. Parman explained the merger of two national teacher preparation organizations and the fact that half of Montana teachers attend preparation programs outside the state. He then described how Montana would benefit by having its licensing

standards more closely aligned with national standards. Members had questions about the different classes of licensure, particularly Class 3 for administrators, which currently does not make any provision for credit for managerial experience in the private sector, and Class 8, which university faculty are required to have in order to teach dual enrollment courses. Members generally were interested in how private sector experience should be factored in to the licensure provisions rather than relying solely on education-based licenses.

Dr. Mary Susan Fishbaugh, Dean of Education at MSU-Billings, then updated the subcommittee (via phone) on efforts to revise Chapter 58 on Professional Educator Preparation Program Standards (PEPPS). These are the standards that programs at Montana colleges and universities must meet in order to be approved and include “unit” standards—more general requirements that the overall program must meet—and “content area” standards—the specific standards for an approved content area licensure such as math, social studies, or health. There are a number of different content areas to review.

Following these updates, Madalyn Quinlan, Chief of Staff at OPI, informed the subcommittee that Superintendent Juneau would prefer to focus on the K-20 shared policy goals and was not interested in pursuing K-12 goals at this time, as many of the K-12 goals are embedded in the K-20 goals. The group discussed the implications of this and questioned whether goals for younger students and struggling schools would be missing without K-12 goals. Ms. Quinlan reviewed the existing K-12 goals and provided updates as to progress on the performance measures. Members acknowledged that these documents are only shared if all the signatories intend to sign them and so turned attention to the K-20 shared policy goals.

Dr. John Cech, Deputy Commissioner for Two-Year and Community College Education, provided an update on the Dual Enrollment Task Force and its efforts to expand dual enrollment opportunities and participation. Dr. Cech described preliminary recommendations that included efforts at streamlining the processes by which both high school teachers and university faculty can be approved to teach dual enrollment courses. He then introduced several other presenters to discuss successful experiences with expanding dual enrollment. Helena High School student Sage Smith asked members to explore changing the age limitations on dual enrollment as well as the requirement that high school teachers have nine graduate credits in their discipline before they are able to teach dual enrollment courses.

Following lunch, Annette Miller of the Department of Labor and Industry presented on the Montana Career Information System (MCIS). MCIS is an online resource that students and counselors can use to gather information on careers and college to aid academic planning. The committee then discussed how the data linkage between K-12 and MUS might be expanded to include career/workforce data.

Ms. Quinlan then presented a document with proposed revisions for the K-20 goals. After reviewing and discussing the document, members asked staff and signatory representatives to work together in advance of the next subcommittee meeting to further revise the K-20 goals and attempt to incorporate career-readiness and entrepreneurship goals, as well as a goal or objective emphasizing improved communication and awareness of educational opportunities such as dual enrollment.

Members determined not to review the MUS goals further but to move them forward to the full ELG when the K-20 goals were finalized.

June 16, 2014

Senator Stewart-Peregoy was not able to attend, but several other ELG members attended the June subcommittee meeting and participated in discussions: Senators Facey and Lewis and Representative Jones.

Mr. Trevor reviewed some minor changes to the MUS Shared Policy Goals document since the previous meeting and then provided a brief overview of the overarching goals for the benefit of nonsubcommittee members of ELG in attendance. Following his presentation, members of the subcommittee voted unanimously to accept the revisions to the document and recommend it to the full ELG committee for consideration.

The subcommittee then welcomed a panel composed of Tom Hoffman of Pioneer Aerostructures in Helena, Jeff Trom of Webfilings in Bozeman, and Barb Wagner, Chief Economist for the Department of Labor and Industry for a roundtable discussion on entrepreneurship and education in Montana. Each panelist introduced themselves and provided a brief overview of their story as entrepreneurs. There was agreement among the panelists on several matters:

- the importance of attitude, grit, and determination to the extent that “soft skills” and performance trump degrees and other credentials in their perspective;
- the benefit of real world experiences as part of the educational experience (i.e. internships); and
- the value of partnerships between higher ed and the business community in workforce development.

Following the roundtable discussion, subcommittee members discussed several revisions to the K-20 document and determined to make several wording changes as well as adding an emphasis on early career opportunities for high school students in addition to the existing early college opportunities. Additionally, members again discussed the lack of K-12 goals and the possibility of incorporating several K-12 goals into the K-20 document, but decided against doing so because MUS has less of a role to play in purely K-12 policy.

Lieutenant Governor McLean spoke to the subcommittee during the public comment period mentioning similar efforts to bridge the business and education communities via the Governor’s “Main Street Montana Project”. She also highlighted the Governor’s proposal for developing state-supported preschool and workforce development through “Big Sky Pathways.”

The subcommittee concluded the meeting with a unanimous vote to present the K-20 Shared Policy Goals document to the full ELG along with a report to be drafted by staff and circulated to subcommittee members for feedback.

## Subcommittee Recommendations

The focus of the subcommittee's work and the core of its recommendations are the shared policy goal documents themselves. These can be found in Appendix A (for MUS) and B (for K-20).

Additionally, the following recommendations reflect discussions of the subcommittee and may be useful to the 2015-2016 ELG:

1. Perform a more in-depth review of the MUS Shared Policy Goals in conjunction with OCHE and the Board of Regents. The MUS Shared Policy Goals are basically a restatement of the MUS Strategic Plan. While this is not in itself problematic, members of the subcommittee find that legislative investment in the goals would be greater if the legislature had more involvement in the crafting of the goals. The purpose of these goals was to foster greater interagency cooperation; the 2015-2016 ELG might consider inviting Regents and the Commissioner of Higher Education to a meeting early in the interim to discuss what a more cooperative process might look like. Possibilities include the appointment of a subcommittee modeled on the former PEPB subcommittee (which included Regents), the appointment of several Regents to a Shared Policy Goals Subcommittee if one is formed, or the appointment of a legislator or legislators to the Regents' strategic planning committee.
2. Reestablish K-12 Shared Policy Goals. The Superintendent of Public Instruction informed the subcommittee that she would not renew the K-12 shared policy goals during this interim. Subcommittee members acknowledged the superintendent's prerogative as a signatory to the document to do so. However, members of the subcommittee did express concern that certain aspects of the K-12 education system will suffer from inattention in the K-20 goals because the K-20 goals focus on the transition from high school to college and/or career. Particularly, the subcommittee is concerned that there is no attention given to elementary or middle school levels in the K-20 goals. The K-20 goals take the focus off of the progress of struggling schools. The K-20 goals do not address oversight of the Board of Public Education's accreditation standards and processes. The K-20 goals do not provide an adequate forum for discussion of issues of local control. Essentially, none of the K-20 goals reflect the uniqueness of the K-8 learning environment. The subcommittee feels the K-12 goals should be reestablished next interim and that the different signatories should acknowledge that while goals may be shared, strategies and policies for achieving those goals may differ. The subcommittee also strongly encourages future efforts to include district trustees as part of this process.
3. Continue to update the K-20 Shared Policy Goals. Subcommittee members and signatory representatives all acknowledged the great strides that have been made in the last several years to better align K-12 and the university system. This is reflected in enhanced data linkages, expanded early access programs, and improved remediation rates. The potential for continued improvements exists, and all Montanans can benefit from ongoing conversations between the Legislature and the education entities. With the current emphases on college and career readiness, fostering entrepreneurship, and building a stronger economy through a stronger education system, the 2015-16 ELG is urged to

involve representatives of the business community and the Department of Labor and Industry in updating and expanding the K-20 goals.

4. Issues raised and ongoing. A number of topics were discussed or identified as part of subcommittee meetings but work on them is in progress. Future committees may benefit from followup discussion of the following:
  - Developmental education reform efforts
  - In-depth review of the federal and state laws and rules that govern student data and privacy
  - Progress made toward improvements at struggling schools, especially at the K-8 level
  - American Indian achievement gap progress
  - In-depth review of student health initiatives, concept of wrap-around services, and collaboration among state agencies
  - Educator and administrator licensure revisions
  - Professional educator preparation program revisions
  - Dual enrollment expansion efforts
  - Montana Career Information System and K-20 collaboration
  - Career readiness and “soft skills” development
  - Entrepreneurship and partnerships with the business community (internships, apprenticeships, hands-on learning opportunities)



Appendix A— Shared Policy Goals and Accountability Measures for MUS

**SHARED POLICY GOALS AND ACCOUNTABILITY MEASURES FOR  
THE MONTANA UNIVERSITY SYSTEM  
2017 BIENNIUM**

The Shared Policy Goals and Accountability Measures for the Montana University System (MUS) represent joint efforts of the Legislature, the Executive Branch, and the University System over the past several years. The goals, objectives, and measures are closely aligned with the MUS Strategic Plan developed by the Board of Regents and reflect a shared commitment to quality and to:

1. Access and affordability
2. Workforce and economic development
3. Efficiency and effectiveness

This document is nonbinding. The Education and Local Government Interim Committee (ELG) shall review, update, approve, and renew this understanding each biennium with the Montana Board of Regents and Commissioner of Higher Education so that it may become the basis of state public policy in regard to the Montana University System.

As a statement of public policy goals for higher education in Montana, this document reflects the ELG's commitment to academic quality throughout the Montana University System and to ensuring that funding a high-quality postsecondary education is a critical goal of the State of Montana. This document is intended to provide the policy direction needed to maintain a quality postsecondary education system in Montana.

The authors of this document urge that it be used by the Legislature in the 2015 legislative session to frame education budget initiatives and other policy recommendations for the 2017 biennium.

Appendix A

**MONTANA UNIVERSITY SYSTEM SHARED POLICY GOALS**

WHEREAS, Article VIII, section 12, of the Montana Constitution vests in the Legislature the responsibility to ensure strict accountability of all revenue received and spent by the state, counties, cities, and towns and all other local governmental entities; and

WHEREAS, Article X, section 9, of the Montana Constitution vests in the Board of Regents of Higher Education the full power, responsibility, and authority to supervise, coordinate, manage, and control the Montana University System and to supervise and coordinate other public educational institutions assigned to it by law; and

WHEREAS, the Montana University System has increasingly, and to positive effect, shared leadership with the Education and Local Government Interim Committee; and

WHEREAS, shared policy goals must be systematically tied to accountability measures in order to ensure timely and effective implementation of education policy; and

WHEREAS, the ELG Subcommittee on Shared Policy Goals and the Montana Board of Regents have identified statewide public postsecondary education policy goals and accountability measures with the input and feedback of the Montana University System.

NOW, THEREFORE, this UNDERSTANDING crafted by the Education and Local Government Interim Committee and the Montana University System identifies the statewide public postsecondary education policy goals and related accountability measures (see Table 1 and attached Board of Regents Strategic Plan) that will be used as a policy goal-setting and assessment tool for policymakers, the University System, and the public in evaluating the achievement of the policy goals and that will be used as a guide to drive decision packages and funding mechanisms for the state funding that is appropriated to the Montana University System by the Legislature.

FURTHERMORE, the parties to this UNDERSTANDING agree that:

1. The Montana University System shall prepare a Shared Policy Goals and Accountability Measures Report presenting appropriate and current data for these goals and accountability measures in an easy-to-read format.
2. This report will be posted to the Board of Regents, Office of the Commissioner of Higher Education, and Education and Local Government Interim Committee websites by June 30 each year.
3. The most recent report will be presented to the House and Senate Education Committees and the Joint Appropriations Subcommittee on Education by the 10th legislative day of the 64<sup>th</sup> legislative session.

Appendix A

**Table 1—Shared Policy Goals and Accountability Measures for the Montana University System**

**Shared Goal I:**

**Increase the overall educational attainment of Montanans through increased participation, retention, and completion rates in Montana University System.**

<b>Goals</b>	<b>Objectives</b>	<b>Measures</b>
1.1 Prepare students for success in life through quality higher education	<ol style="list-style-type: none"> <li>1. Improve postsecondary education participation rates</li> <li>2. Increase retention rates within the MUS</li> <li>3. Increase completion rates within the MUS</li> </ol>	<ol style="list-style-type: none"> <li>1. College continuation rates</li> <li>2. Freshmen retention rates</li> <li>3. Graduation rates</li> </ol>
1.2 Make higher education more affordable by offering more need-based financial aid and scholarships	<ol style="list-style-type: none"> <li>1. Reduce the amount of unmet student need for financial aid</li> <li>2. Increase the percentage of students who receive financial aid or scholarships, as well as the average award amount</li> </ol>	<ol style="list-style-type: none"> <li>1. State-funded, need-based aid per student</li> <li>2. Percent of first-time, full-time resident students receiving aid, and average amount awarded</li> </ol>
1.3 Promote postsecondary education affordability	<ol style="list-style-type: none"> <li>1. Decrease average loan amounts and the percentage of students borrowing</li> <li>2. Decrease tuition as a percentage of median household income</li> <li>3. Increase the amount of state support as a percentage of total personal income relative to peer states and historical levels</li> </ol>	<ol style="list-style-type: none"> <li>1. Student loan debt of first-time, full-time resident students in MUS and percent borrowing</li> <li>2. Ratio of tuition and fees to median household income</li> <li>3. State support for higher education per capita and per \$1,000 of personal income</li> </ol>
1.4 Work collaboratively with K-12 system to increase high school academic preparedness, completion, and concurrent enrollment programs	<ol style="list-style-type: none"> <li>1. Expand outreach to at-risk and disadvantaged students as to the importance and accessibility of postsecondary education and the quality of the MUS</li> <li>2. Expand outreach to top academic achievers graduating from Montana high schools</li> <li>3. Increase dual enrollment and advanced placement</li> </ol>	<ol style="list-style-type: none"> <li>1. At-risk and disadvantaged student enrollment</li> <li>2. Percent of entering students with ACT/SAT scores in the top quartile</li> <li>3. Number of MT high school students taking AP exams and early college courses</li> </ol>
1.5 Increase postsecondary enrollment of traditional and nontraditional students through expanded outreach programs, evening/weekend programs, and 2-year programs	<ol style="list-style-type: none"> <li>1. Increase enrollment in 2-year programs</li> <li>2. Increase programs and classes for nontraditional students, including evening and weekend programs</li> </ol>	<ol style="list-style-type: none"> <li>1. Enrollment at 2-year institutions</li> <li>2. Enrollment of non-traditional students (students 25 years and older)</li> </ol>
1.6 Improve distance and online learning by coordinating online delivery of education across the entire Montana University System	<ol style="list-style-type: none"> <li>1. Increase student enrollment in online courses</li> <li>2. Increase the number of online courses and degrees</li> </ol>	<ol style="list-style-type: none"> <li>1. Enrollment in distance learning courses</li> <li>2. Number of distance learning courses offered at 2-year and 4-year colleges</li> </ol>

Appendix A

**Shared Goal II:**

**Assist in the expansion and improvement of the state's economy through the development of high-value jobs and the diversification of the economic base.**

Goals	Objectives	Measures
2.1 Increase responsiveness to workforce development needs by expanding and developing programs in high-demand fields	<ol style="list-style-type: none"> <li>1. Increase degrees and certificates awarded in high-demand occupational fields</li> <li>2. Increase job placement rates</li> <li>3. Increase the number of degrees and certificates conferred in 2-year programs</li> </ol>	<ol style="list-style-type: none"> <li>1. Number of degrees and certificates awarded in healthcare</li> <li>2. Percent of resident graduates entering MT workforce</li> <li>3. Number of associate degrees and certificates awarded</li> </ol>
2.2 Establish collaborative programs among institutions, the private sector, and the state to expand research, technology transfer, the commercialization of new technologies, and the development of our entrepreneurs	<ol style="list-style-type: none"> <li>1. Increase research and development receipts and expenditures</li> <li>2. Increase technology licenses with Montana businesses</li> </ol>	<ol style="list-style-type: none"> <li>1. MUS research and development expenditures</li> <li>2. MUS technology transfer activity</li> </ol>
2.3 Expand graduate education capacity and opportunities in order to increase educational attainment of Montanans, fuel economic development, grow the research and development enterprise, and contribute to the cultural and social fabric of Montana and the region	<ol style="list-style-type: none"> <li>1. Increase the number and percentage of graduate students in the Montana University System</li> <li>2. Increase graduate degree production, maintaining a strong concentration in science, technology, engineering, and math (STEM) fields</li> </ol>	<ol style="list-style-type: none"> <li>1. Graduate student enrollment</li> <li>2. Graduate degrees awarded (per 100 grad student FTE, number and percent in STEM)</li> </ol>

Appendix A

**Shared Goal III:**

**Improve institutional and system efficiency and effectiveness.**

<b>Goals</b>	<b>Objectives</b>	<b>Measures</b>
3.1 Improve accuracy, consistency, and accessibility of system data, including the continued development of a comprehensive data warehouse	BOR Strategic Initiatives <ol style="list-style-type: none"> <li>1. Develop an integrated information system</li> <li>2. Continue to develop and improve the MUS education network</li> <li>3. Maintain and work to improve a system-wide data warehouse</li> </ol>	BOR Strategic Initiatives include: Community College Banner Integration, Data Standardization Project, Northern Tier Network, K-20 Data Linkage
3.2 Deliver efficient and coordinated services	<ol style="list-style-type: none"> <li>1. Expenditures per student relative to peer institutions and history</li> <li>2. Percent of expenditures in instruction, research, public service, academic support, student services, institutional support, plant O&amp;M, and scholarships</li> <li>3. Improve articulation and transferability among all 2-year and 4-year institutions including community colleges and tribal colleges</li> </ol>	<ol style="list-style-type: none"> <li>1. Total revenue per student FTE (MT, WICHE, regional peers)</li> <li>2. MUS expenditures by program area</li> <li>3. Status of common course numbering initiative</li> </ol>
3.3 Biennial review/update of the budget allocation model consistent with state and system policy goals and objectives	<ol style="list-style-type: none"> <li>1. Focus on financing for the state system, not only funding for the individual campuses</li> <li>2. Be transparent as to the policy choices of the Regents, Legislature, and Executive Branch</li> <li>3. Provide a framework for dealing with allocations to institutions, tuition revenues, financial aid, and mandatory fee waivers</li> <li>4. Have a specific fund dedicated to furthering Regents' priorities</li> <li>5. Protect institutional viability by moderating the short-term effects of enrollment changes</li> <li>6. Provide incentives for institutions to collaborate as a system</li> <li>7. Ensure equity of funding among all institutions</li> <li>8. Maintain an adequate base of funding and education quality for all institutions</li> <li>9. Maintain a differential between 2-year and 4-year tuition</li> </ol>	Allocation Model Review: the present "base plus" allocation model requires a comprehensive review/update. System goals, Regents' priorities, enrollment changes, performance/outcomes and incentive funding are a few of the critical issues requiring study and analysis, as we move toward a revised allocation model

Appendix A

The signatures below denote that the signatories support the shared policy goals and accountability measures cited herein.

Dated this 15<sup>th</sup> day of September 2014.

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Senator Tom Facey, Chair  
Education and Local Government  
Interim Committee

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Paul Tuss, Chair  
Board of Regents

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Representative Don Jones, Vice Chair  
Education and Local Government  
Interim Committee

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Clayton Christian, Commissioner of  
Higher Education

Appendix B— Shared Policy Goals and Accountability Measures for K-20

**SHARED POLICY GOALS AND ACCOUNTABILITY MEASURES FOR  
THE K-20 PUBLIC EDUCATION SYSTEM  
2017 BIENNIUM**

The Shared Policy Goals and Accountability Measures for the Montana K-20 Public Education System represent joint efforts of the Legislature, the Board of Public Education, the Superintendent of Public Instruction, and the Montana University System over the past several years. The goals, objectives, and measures are aligned with the strategic directions of these entities and reflect a shared commitment to quality and to:

1. Aligning high school outcomes with college readiness expectations to facilitate the transition from high school to college
2. Increasing college enrollment by Montana high school graduates
3. Expanding access to early college and career opportunities for Montana high school students
4. Utilizing K-20 data to improve student access to and achievement in postsecondary education

This document is nonbinding. The Education and Local Government Interim Committee (ELG) shall review, update, approve, and renew this understanding each biennium with the K-20 education system entities so that it may become the basis of state public policy in regard to the K-20 education system.

As a statement of public policy goals for education in Montana, this document reflects the ELG's commitment to academic quality throughout the K-20 education system and to ensuring that funding a high quality education system is a critical goal of the State of Montana. This document is intended to provide the policy direction needed to maintain a quality K-20 education system in Montana.

The authors of this document urge that it be used by the Legislature in the 2015 legislative session to frame education budget initiatives and other policy recommendations for the 2017 biennium.

## **K-20 SHARED POLICY GOALS**

WHEREAS, Article VIII, section 12, of the Montana Constitution vests in the Legislature the responsibility to ensure strict accountability of all revenue received and spent by the state, counties, cities, and towns and all other local governmental entities, and Article X, section 1, requires the Legislature to fund and distribute in an equitable manner to the school districts the state's share of the cost of the basic elementary and secondary school system; and

WHEREAS, Article X, section 9, of the Montana Constitution vests in the Board of Regents of Higher Education the full power, responsibility, and authority to supervise, coordinate, manage, and control the Montana University System and to supervise and coordinate other public institutions assigned to it by law; and

WHEREAS, Article X, section 9, of the Montana Constitution states that the Board of Public Education shall exercise general supervision over the public school system; and

WHEREAS, section 20-3-106, MCA, grants supervision of certain aspects of the public schools and districts of the state to the Superintendent of Public Instruction; and

WHEREAS, Article X, section 8, of the Montana Constitution states that the elected board of trustees in each school district shall exercise supervision and control of schools in the district; and

WHEREAS, economic challenges facing the state require prioritizing a K-20 education system that serves economic development and job creation; and

WHEREAS, agencies of the education community have increasingly, and to positive effect, shared leadership with the Education and Local Government Interim Committee; and

WHEREAS, an understanding of shared policy goals and accountability measures for the entire K-20 public education system, shared by the Board of Regents, Commissioner of Higher Education, Superintendent of Public Instruction, Board of Public Education, and Education and Local Government Interim Committee, would represent an important advance in interagency cooperation and in the quality of education policymaking; and

WHEREAS, shared policy goals must be systematically tied to accountability measures in order to ensure timely and effective implementation of policy; and

WHEREAS, the ELG Subcommittee on Shared Policy Goals for Education, comprised of four legislators and representatives from the Board of Regents, the Board of Public Education, the Office of Public Instruction, and the Office of the Commissioner of Higher Education, has identified statewide public education policy goals and accountability measures for the K-20 public education system.

This UNDERSTANDING crafted by the Education and Local Government Interim Committee and the Board of Regents, the Board of Public Education, the Office of Public Instruction, and the Office of the Commissioner of Higher Education, identifies the statewide public education policy goals and related accountability measures (see Table 1)



that will be used as a policy goal setting and assessment tool for policymakers, the state education boards and agencies, and the general public in evaluating the achievement of the policy goals; and that will be used, in conjunction with 20-9-309, MCA, as a guide to drive decision packages and funding mechanisms for the state funding that is appropriated to the K-20 public education system by the Montana State Legislature.

FURTHERMORE, the parties to this UNDERSTANDING agree that:

1. The Office of the Commissioner of Higher Education and the Office of Public Instruction shall prepare a Shared Policy Goals and Accountability Measures Report presenting appropriate and current data for these goals and accountability measures in an easy-to-read format.
2. This report will be posted to the Board of Regents, Office of the Commissioner of Higher Education, Board of Public Education, and the Office of Public Instruction, and the Education and Local Government Interim Committee websites by June 30 of each year.
3. The most recent report will be presented to the House and Senate Education committees and the Joint Appropriations Subcommittee on Education by the 10th legislative day of the 64<sup>th</sup> legislative session.

**Table 1**  
**K-20 Shared Policy Goals, Objectives, and Accountability Measures**  
**2017 Biennium**

Shared Policy Goals	Objectives	Accountability Measures
1. Align high school outcomes with college-readiness expectations to facilitate the transition from high school to college	1.1 Reform developmental education policies and practices in order to reduce remediation rates of entering freshman	1.1 Remediation rates of freshman who enter the Montana University System from Montana public high schools within 16 months of high school graduation
2. Increase the awareness among high school students and their families of opportunities to enroll in postsecondary education through improved collaboration among state entities	2.1 Increase the percentage of MT high school graduates who enroll in postsecondary education  2.2 Increase the percentage of graduates who enroll in postsecondary education within 16 months of high school graduation from high schools identified as struggling	2.1 Percentage of MT high school graduates who enroll in postsecondary education within 16 months of high school graduation  2.2 Percentage of graduates who enroll in postsecondary education within 16 months of high school graduation from high schools identified as struggling
3. Expand access to early college and career opportunities for high school students	3.1 Provide opportunities for high school students to enroll in college level courses through dual enrollment  3.2 Expand opportunities for students to earn industry-validated certificates while in high school	3.1 Number and percentage of high school students who are dually or concurrently enrolled  3.2 Number and percentage of high school students who earn industry-validated certificates through the Montana University System
4. Utilize K-20 data to identify best practices for improving student access to postsecondary and for promoting student success in postsecondary	4.1 Link K-12 and Higher Education data systems to create a trusted data source for analyzing how well high school programs are preparing students to succeed in postsecondary programs.	4.1 Percentage of high school students who use the electronic student transcript to apply to college

Appendix B

The signatures below denote that the signatories support the shared policy goals and accountability measures cited herein.

Dated this 15th day of September 2014.

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Senator Tom Facey, Chair  
Education and Local Government  
Interim Committee

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Paul Tuss, Chair  
Board of Regents

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Representative Don Jones, Vice Chair  
Education and Local Government  
Interim Committee

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Clayton Christian, Commissioner of  
Higher Education

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Sharon Carroll, Chair  
Board of Public Education

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Denise Juneau, Superintendent  
Office of Public Instruction