



Education Interim Committee

66th Montana Legislature

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EDIC's Statutory Reporting Requirements

The Education Interim Committee requested more information about the reports that are required or requested in the Montana Code Annotated to be provided to or from the committee. EDIC also requested information specifically about the schedule and the deadlines for each report.

The following chart divides the listed reports into the following categories:

- Reporting Requirements for EDIC to PERFORM
- Statutory Reports for EDIC to RECEIVE
- UNCLEAR or UNASSIGNED or GENERAL (to the Legislature) Statutory Reports
- Other Committees' Reports of Possible Interest to EDIC

Legislative Council is also looking at the issue of statutory reporting requirements. As of the Council's most recent meeting on Monday, January 13, the Council has approved additional work by staff to review the reporting requirements and provide a bill draft to update and improve consistency among the required reports. Specific areas of concern include:

- Clarifying and updating the process in 5-11-210, the report clearinghouse statute
- Adding references to 5-11-210 in other statutes with required reports
- Changing "appropriate legislative interim committees" to the specific interim committee applicable

EDIC STATUTORY REPORTING REQUIREMENTS

I. Reporting Requirements for EDIC to PERFORM

<u>Statute</u>	<u>Required/Optional</u>	<u>Deadline</u>	<u>From Whom?</u>	<u>To Whom?</u>	<u>Report</u>
5-5-215	If Requested	Default (Sept. 1)	EDIC	Legislature	<u>REPORT REVIEW</u> : If requested by a member of an interim committee, the committee must review required reports of the assigned agencies to make recommendations to the next Legislature on retaining or eliminating a required report.
5-5-216	If Requested	Default (Sept. 1)	EDIC	Legislature	<u>INTERIM RECOMMENDATIONS</u> : An interim committee may make recommendations to the Legislature for legislation.
5-5-224	Required	—	EDIC	Legislature	<u>EDIC ENABLING STATUTE</u> : The committee must "study and report to the legislature on the advisability of adjustments to the mechanisms used to determine funding for the university system, including criteria for determining approaches of funding"
5-11-210	Required	DEFAULT: Sept. 1 of each year preceding a regular session	Any entity required to submit a report	EDIC Any other appropriate interim or statutory committee	<u>REPORT CLEARINGHOUSE</u> : This statute provides the required procedure for any written report that is required by law to be given to or filed with the Legislature. The deadline provided in this statute is Sept. 1, and each entity is required to provide a final title, a 100-word abstract, a website, and a recommendation for the number of paper copies. Each interim committee is supposed to make a written direction to a reporting entity to provide a specific number of paper copies, and may require the entity to submit an electronic version.

II. Statutory Reports for EDIC to RECEIVE

<u>Statute</u>	<u>Required/Optional</u>	<u>Deadline</u>	<u>From Whom?</u>	<u>To Whom?</u>	<u>Report</u>
19-20-732	Required	Sept. 15 of even-numbered years	Teachers' Retirement Board	EDIC SAVA	<u>RETIRED TEACHER REEMPLOYMENT</u> : Report on the reemployment of certain retired teachers, specialists, and administrators - the implementation and results of reemploying retired teachers when a second-class or third-class district has been unable to fill a position
20-1-231	Required	Sept. 15 of even-numbered years	Reps from Great Falls & Helena districts Member of the military chosen by the adjutant general	Senate President Speaker of the House EDIC	<u>MILITARY CHILDREN COMPACT</u> : Report on the state's participation in the Compact on Educational Opportunity for Military Children, established in 20-1-230 to remove barriers to educational success for children of military families due to frequent moves and deployment of their parents.
20-7-469	One-Time Required	Sept. 15, 2020	OPI and BPE	EDIC*	<u>DYSLEXIA</u> : Report on the progress made in addressing dyslexia pursuant to the Montana Dyslexia Screening and Intervention Act, 20-7-469.
20-7-1506	Required	Sept. 15 of even-numbered years	BPE	EDIC*	<u>ADVANCED OPPORTUNITY ACT</u> : Report on the progress of districts operating under approved Advanced Opportunity plans, including: the number of pupils benefiting from advanced opportunity aid; the number and types of credits and credentials or certifications earned by pupils that were paid for by the program; the projected growth of the program and

					funding needs for the next biennium; and any issues reported, how issues are being addressed, and whether legislative action is required.
20-7-1602	Required (terminates June 30, 2027)	Sept. 15 of even- numbered years	BPE	EDIC*	<u>TRANSFORMATIONAL LEARNING</u> : Report on the progress made by districts operating under approved Transformational Learning plans.
20-9-161	Required	Situational	School district	EDIC BPE	<u>DISTRICT BUDGET AMENDMENTS</u> : A district that amends an adopted budget because of the educational functions of the district that exceeds 10% of the adopted general fund budget (may be in combination with other budget amendments within the same school year) must report to EDIC and BPE with an explanation of why the budget amendment is necessary.
20-9-323	Required	Situational	School district	EDIC	<u>EXCESS ENDING FUND BALANCE</u> : If a school district has a combined ending fund balance (excluding the building reserve fund, debt service fund, and bus depreciation reserve fund) that exceeds 300% of the maximum general fund budget, the district must report an explanation to EDIC.
20-26-105	Required	Not specified but must be provided annually	OCHE	EDIC*	<u>POSTSECONDARY FINANCIAL AID</u> : The report has several required elements, including reporting the prior year's progress and results for: incentive-based financial aid; merit-based financial aid; and access-based financial aid.
22-3-423	Required	Default	State Historic Preservation Officer	EDIC (the appropriate	<u>HERITAGE PROPERTIES</u> : The state historic preservation officer is required to report about the status and stewardship of the state

				legislative interim committee)	agencies' and university system's heritage properties and make recommendations regarding the management of these properties. This information must also be included in the biennial report to the Governor and the Legislature required under 22-3-107.
52-2-211	Required	Sept. 15 (annually)	OPI	EDIC	<u>INTERDISCIPLINARY CHILD SAFETY TEAMS:</u> County school superintendents must provide a copy of a written agreement for the county/regional interdisciplinary child information and school safety team to OPI by Sept. 1. OPI must then report to EDIC on any county that has not provided a written agreement by the deadline.

* These are new reporting requirements from the 2019 Legislature

III. UNCLEAR or UNASSIGNED or GENERAL Reports to the Legislature

<u>Statute</u>	<u>Required/Optional</u>	<u>Deadline</u>	<u>From Whom?</u>	<u>To Whom?</u>	<u>Report</u>
5-20-301	Required	Sept. 15 (every 10 years)	School Funding Interim Commission	Not Specified	<u>DECENNIAL SCHOOL FUNDING STUDY:</u> The School Funding Interim Commission is required to meet every fifth interim and at the end of the study must issue a report of its findings, recommendations, and any draft legislation proposed by the Commission.
13-22-108	Required Upon Request	Upon Request (each biennium)	SOS	Legislature	<u>YOUTH VOTING ACT:</u> Upon request, the SOS must report to the Legislature on the effectiveness of the Youth Voting Act in achieving its objectives. Participating schools

					and agencies are required to provide information for the SOS's report.
20-2-501	Required	Annually	Education Commission of the States	Legislature Governor	<u>COMPACT FOR EDUCATION</u> : The Education Commission must provide an annual report covering the activities of the commission over the preceding year.
20-7-330	Required	Default (Sept. 1)	BOR	Legislature	<u>STATE CTE PLAN</u> : The Board of Regents must convene at least 4 meetings a year to discuss the 5-year state plan for career and technical education (required under federal law). The Board is required to report the results of these meetings to the Legislature.
20-7-904	Required	Sept. 15 of even-numbered years	OPI	Legislature* Governor	<u>GIFTED AND TALENTED STUDENTS</u> : Report on the status and effectiveness of programs for gifted and talented students. The report must include: the total number of schools applying for and receiving G&T funds, broken down by school size; a description of how a district includes a child's parents in the evaluation process; the total number of students in the district and the total identified as G&T; a description of teacher training provided; a description of services provided to G&T students; and an evaluation of the effectiveness of the program, including student growth and achievement and student and parent satisfaction with the program.
20-9-328	Required	Sept. 15 of even-numbered years	OPI	Legislature** Governor	<u>AT-RISK STUDENTS</u> : Report to the Governor and the Legislature on the change in status of standardized test scores, graduation rates, and drop-out rates of at-risk students.

20-9-330	Required	Sept. 15 of even-numbered years	OPI	Legislature** Governor	<u>AMERICAN INDIAN STUDENTS</u> : Report to the Governor and the Legislature on the change in status of standardized test scores, graduation rates, and drop-out rates of American Indian students.
20-25-236	Optional	Default (Sept. 1)	MT Agricultural Experiment Station and Cooperative Extension Service	Legislature	<u>SUSTAINABLE AG RESEARCH</u> : The AES and CES may report to the Legislature regarding the expenditures, activities, and outcomes of the Montana Sustainable Agriculture Research and Education Act.
20-25-801	Required	Jan. 15 of each year	Western Regional Higher Education Compact Commission	Legislature Governor	<u>REGIONAL HIGHER EDUCATION COMPACT</u> : The commission must report annually to the Governor and the Legislature about its activities for the preceding calendar year.
22-3-107	Required	Default (Sept. 1)	MT Historical Society Board of Trustees	Legislature Governor	<u>HISTORICAL SOCIETY ACTIVITIES</u> : Report to the Governor and the Legislature biennially on all important transactions and acquisitions made during the biennium, as well as suggestions and recommendations to better realize the purposes of MHS and improve its collections and services.
90-1-404	Required	Default (Sept. 1)	MT State Library	Legislature** Governor	<u>LAND INFORMATION</u> : Report biennially to the Governor and the Legislature on the progress made in the ongoing collection, maintenance, standardization, and dissemination of land information.

* These are new reporting requirements from the 2019 Legislature

** These reports have traditionally been presented to EDIC

IV. Other Committees' Reports of Possible INTEREST to EDIC

<u>Statute</u>	<u>Required/Optional</u>	<u>Deadline</u>	<u>From Whom?</u>	<u>To Whom?</u>	<u>Report</u>
2-6-1108	Required	Default (Sept. 1)	State Records Committee	Legislature	<u>STATE RECORDS</u> : Report on committee activities, improvements in records management, areas requiring further improvement, committee recommendations and future plans
2-17-512	Required	Regular Basis	DOA	Appropriate Interim Committee (SAVA)	<u>STATE IT REPORT</u> : Report on the department's information technology activities
22-3-1003 (and 22-3-1002)	Required	Default (Sept. 1)	MT Heritage Preservation and Development Commission	Legislature (EAIC)	<u>HERITAGE COMMISSION</u> : Report to the Governor and the Legislature prior to the convening of each regular session about the financial activities during the prior biennium, include the acquisition or sale of any assets. Under 22-3-1002, the "appropriate legislative interim committee" is supposed to review the specific indirect administrative rate negotiated between the Commission and the Dept. of Commerce (The Commission is administratively attached to the Dept. of Commerce and EAIC usually schedules a presentation for this report).
39-6-101	Required	At least once every 2 years	DOLI	Legislature (EAIC)	<u>APPRENTICESHIP</u> : Report on the department's activities and findings related to apprenticeships (EAIC receives a report that the apprenticeship report is coming; it usually isn't written until November or December)

53-21-508	Required	Annually	DPHHS	CFHHS	<p><u>CHILDREN'S MENTAL HEALTH OUTCOMES:</u> Report annually on results of monitoring children receiving targeted case management services, including the following factors related to school success: the number of children enrolled in and attending school; and the number of children who advanced to the next grade level from the previous school year.</p>
53-21-1102	Required	Biennial	DPHHS	Appropriate Interim Committee (CFHHS)	<p><u>SUICIDE REDUCTION PLAN:</u> DPHHS must develop a plan and produce a final product that takes public comment into account. The plan must include concrete targets for reducing suicide among demographic groups, including reducing suicide among American Indians, veterans, and youth</p>