

1) General Introduction

- a) Background; brief review of QSIC and previous litigation; progress report on previously identified issues; Constitutional framework
- b) SB 128
- c) Members
- d) Timeline
- e) Survey
- f) Main topics

2) Recruitment and retention

a) Review and summarize commission work/provide links where appropriate

- (1) [ECS memo on R&R](#)
 - (a) Nationally, enrollment in teacher prep programs has declined in recent years ([MT data](#) shows fluctuating enrollment but steady completion numbers 2009-2013)
 - (b) Studies conflict on whether or not an overall teacher shortage exists, though regional and specific content area shortages are evident
 - (c) States are exploring a number of different recruitment and retention strategies
- (2) [Dr. Ingersoll presentation](#) (Jan 2016)
 - (a) The reserve pool is large source of teacher hires
 - (b) Schools suffer from a revolving door largely due to job dissatisfaction
 - (c) Turnover is costly in dollars and achievement
 - (d) New teacher induction can be effective in plugging “leaky bucket”
- (3) [QSIC study on Teacher Recruitment and Salaries](#)
 - (a) Non-salary factors play large role in R&R
 - (b) Smaller, isolated districts have greater R&R problems
 - (c) MT ranking for average teacher salaries has improved; starting salaries still lowest in nation
- (4) Education community efforts to improve R&R
 - (a) [RISE4MT](#) is a collaborative effort of education stakeholders to improve teacher recruitment in Montana
 - (b) [SAM Leaders Professional Learning Program](#) aims to provide effective and quality induction/mentorship for new school administrators
- (5) K-12 health benefits (panel presentations January 12 and April 5, 2016)
 - (a) Benefit costs are consuming a larger chunk of school budgets
 - (b) There is great variability in health plans among districts

- (c) There have been previous, narrowly defeated efforts to create statewide pool for K-12 employees
- (d) The federal health care landscape is uncertain
- (6) [The Quality Educator Loan Assistance Program](#) (QELP)
 - (a) Federal classifications of rurality/isolation not a good match for Montana
 - (b) QELP current structure allows teachers in some urban schools to benefit while preventing teachers in some rural schools from benefitting

b) Commission findings (TBD by commission in June)

- (1) Schools across Montana struggle with recruitment and retention in specific content areas, particularly special education, math, and career/technical education.
- (2) Schools that are geographically isolated from population centers struggle with recruitment and retention regardless of content area.
- (3) QELP needs revision/better targeting/increased effectiveness.
- (4) Salary is only one factor contributing to recruitment and retention difficulty.
- (5) The topic of health benefits for school employees is complex, in flux, and requires in-depth study.

c) Commission recommendations (TBD by commission in June)

- (1) LC QELP—bill draft to revise Quality Educator Loan Assistance Program
- (2) LC HLTH—bill draft to create study on K-12 health benefits
- (3) OPI, BPE, MUS, and education community should continue coordination to ensure quality induction programs and update the LEG on efforts.
- (4) Teacher prep programs should encourage rural preservice experience.
- (5) The MUS should examine offering/expanding teacher prep programs in locations that benefit recruitment in rural MT as well as online programs.

3) District structure and equity

a) Review and summarize commission work/provide links where appropriate

- (1) [ECS presentation on consolidation](#)
 - (a) Consolidation does not always result in cost efficiencies
 - (b) Forced consolidation has mixed results and is controversial
 - (c) Montana's blend of EL, HS, and K-12 districts is unusual and complicates consolidation
- (2) [Presentation on RESAs](#); while regional educational service areas are not statutorily created, OPI supports them as vehicles for professional development, increased efficiency, and collaboration

- (3) Tax equity issues
 - (a) The commission examined [current law related to district structure and reorganization](#)
 - (b) The commission explored the [decrement](#), [GTB aid](#), [Impact Aid](#), and the role of [nonlevy revenue](#) in district general fund budgets
 - (c) Nonlevy revenues, including block grants, along with property tax wealth contribute to disparity in mills levied for BASE budgets, and the commission explored several ways of [equalizing BASE mills](#)
- (4) [Tuition laws](#)—the commission examined current statute regarding out-of-district attendance
- (5) Technology as a means to create efficiencies and ensure equality of educational opportunity and the commission received presentations on:
 - (a) the EducationSuperHighway initiative; and
 - (b) the Montana Digital Academy

b) Commission findings (TBD by commission in June)

- (1) District consolidation is not necessarily tied to higher student achievement or cost savings.
- (2) The needs of all schools, and particularly small, isolated schools, in developing the full educational potential of all children warrants continuous monitoring.

c) Commission recommendations (TBD by commission in June)

- (1) Further study should be conducted on the needs of isolated schools and children, MT's isolation definition, and demographic changes.
- (2) Technology should be leveraged for effective, efficient instruction and to support equality of educational opportunity.

4) Facilities

a) Review and summarize commission work/provide links where appropriate

- (1) [ECS presentation on facilities](#)
 - (a) State support around the country ranges from none to full with a variety of levels and mechanisms
 - (b) Considerations include predictability, equity, prioritization, flexibility
 - (c) Several states conduct regular reassessment of facilities to ensure prioritized rankings of projects
- (2) Current mechanisms for funding facilities
 - (a) [State assistance with facilities 2003-2017 chart](#)
 - (b) [Funding for capital improvements \(MASBO\)](#)
 - (c) Debt service GTB [overview](#) and [history](#)
 - (d) Quality Schools Facility Grant Program—the commission received a presentation from the Dept of Commerce on the program and heard testimony from stakeholders about the pros and cons of the program

- (3) [Overview of 2008 School Facility Inventory](#)
 - (4) [INTERCAP program](#) –this Board of Investments-administered program provides low-interest loans to school districts for purposes including facilities projects
 - (5) [Bond election trends](#)
 - (6) The commission received input from stakeholders that focused on:
 - (a) the infrastructure needs of schools;
 - (b) the need for consistent, predictable state support for district facility projects; and
 - (c) the need to incentivize district stewardship.
- b) Commission findings (TBD by commission in June)**
- (1) The commission identified 3 “tiers” related to facility needs:
 - (a) Tier 1—Operations and maintenance (O&M; state/district share costs via district GF)
 - (b) Tier 2—Major maintenance (roofs, boilers, etc; these needs are not being addressed due to lack of consistent state support and district commitment—few districts utilize building reserve)
 - (c) Tier 3—New construction (bonding is the main funding vehicle for this and state support of poor districts through debt service GTB program has eroded)
 - (2) State support for tiers 2 & 3 has been unreliable and generally decreasing in recent years
 - (3) Districts are able to plan more effectively when:
 - (a) they are provided greater budgetary flexibility;
 - (b) state support is consistent; and
 - (c) state programs are flexible in meeting the varied needs of districts
- c) Commission recommendations (TBD by commission in June)**
- (1) LC ICAP—minor changes to INTERCAP loan program to increase utility
 - (2) LC EFBT—to provide transferability of district general fund ending balance to building reserve
 - (3) LC DSGB—to shore up revenue streams for current debt service GTB and Quality Schools Facility Grant Program (QSGP)
 - (4) LC GRT1—replacing QSGP with a formula facility grant program requiring updated facility inventory and plan and local effort; revising revenue streams
 - (5) LCGRT2—revising QSGP to require updated facility inventory and plan and local match; revising revenue streams

5) Special education (SE) and special needs (including gifted and talented)

- a) Review and summarize commission work/provide links where appropriate

- (1) The commission learned about [SE funding generally](#), [SE expenditures by funding source 1990-2014](#), and the [role of SE Cooperatives](#)
 - (2) The commission heard testimony regarding state funding of older SE students
 - (a) MT is one of two states that do not provide state funding for SE students through age 21
 - (b) Extending this funding was proposed in [HB 451 \(Pope; 2015\)](#)
 - (3) The commission received a [proposal](#) from the SE Cooperative Funding Task Force convened by OPI for increasing SE funding and directing more funding to SE coops
 - (4) The commission also examined funding for gifted and talented programs after receiving public comment
 - (a) [Information from OPI](#)
 - (b) [Statutory and rule references related to G&T](#)
- b) Commission findings (TBD by commission in June)**
- (1) SE coops are struggling to cover costs and state support has been flat
 - (2) Flat state support for SE has led to greater local share of SE expenditures
 - (3) Needs and costs for SE are increasing and changing
 - (4) Funding for special needs is complex and in flux with passage of ESSA; actual costs are unknown
 - (5) There is a lack of consistency in G&T programs statewide
 - (6) Teachers need and want PD aimed at serving G&T kids
- c) Commission recommendations (TBD by commission in June)**
- (1) LCs SE01, SE02, and SE03—options for increasing the state special education payment
 - (2) LC GFTD—creating component for funding G&T programs
 - (3) LC SNSY—requesting study of costs of special needs and exploration of different special needs funding mechanisms
 - (4) OPI and teacher preparation programs should ensure that practicing and prospective teachers are able to serve G&T students