



# Innovation and Excellence in Education Working Group

Montana's School Funding  
Interim Commission

National Center on  
Education and the  
Economy  
January 13, 2026





# The Statutory Charge

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## The Innovation and Excellence in Education Working Group

The IEEWG is tasked with:

- Comparing the education policies of Montana with the policies of high-performing international and domestic educational systems;
- Developing recommendations to adapt the appropriate education policies of high-performing education systems for the public education system in Montana;
- Developing an implementation plan for the recommendations; and
- Publishing its recommendations and implementation plan no later than January 30, 2026.



# The IEEWG within the SFIC

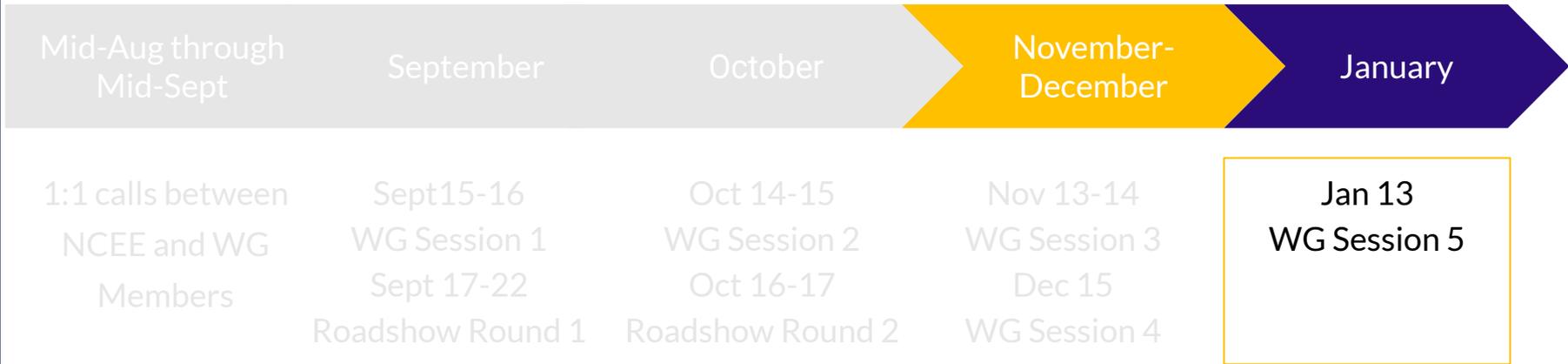
## Phase I: IEEWG

- What do high performing systems look like?
- What can we borrow to look more like them (and get better results)?
- How should we implement it?
- What are the costs?

## Phase II: Funding Formula / Funding

- How do we fund it?

# Our Timeline: August 2025 - January 2026



**NCEE's role**

- Draft full report**
- Seek feedback from Commissioners on final report**
- Revise final report**

**Commissioner roles**

- Provide feedback on draft report**



# Our Commitments



## Bring Your Whole Self

Your ideas, questions, stories, and lived experiences are a part of the work. Share them.



## Listen to Understand

Seek curiosity. Make space for perspectives different from your own.



## Be Present

Make the most of our opportunity to be here in person together.



## Embrace the “Yes, And”

Play with ideas. See where they can go.



## Take Care of Yourself

Hydrate, stand, move. You’ll bring your best self if you do what you need to do to be engaged.



## Share the Air

Help us to promote equal air time and dialogue among Commissioners.

# January 13th Goals



*Design*

Provide feedback on full  
draft



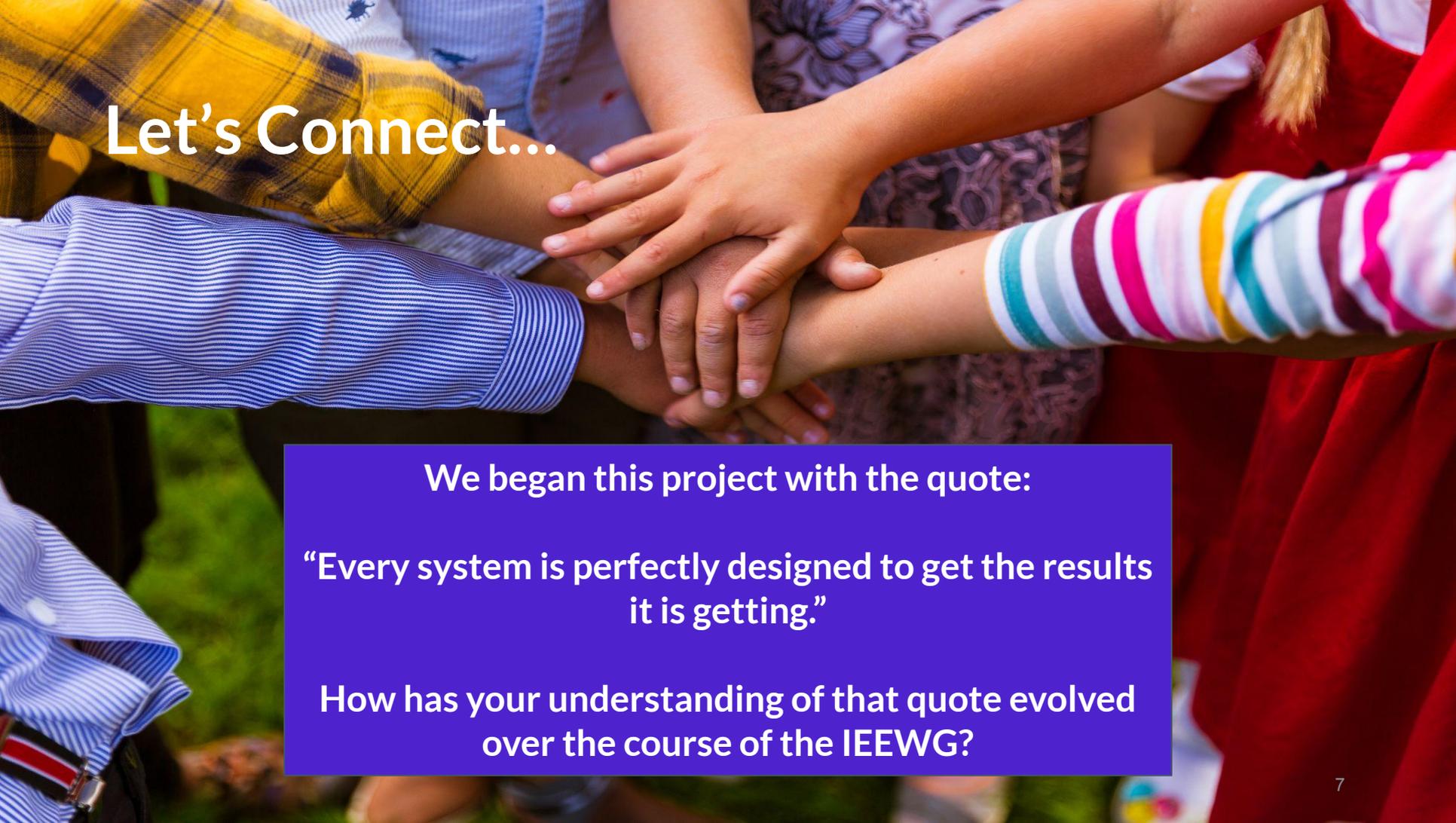
*Design*

Identify revisions needed



*Design*

Consider other  
enhancements



Let's Connect...

We began this project with the quote:

“Every system is perfectly designed to get the results it is getting.”

How has your understanding of that quote evolved over the course of the IEEWG?

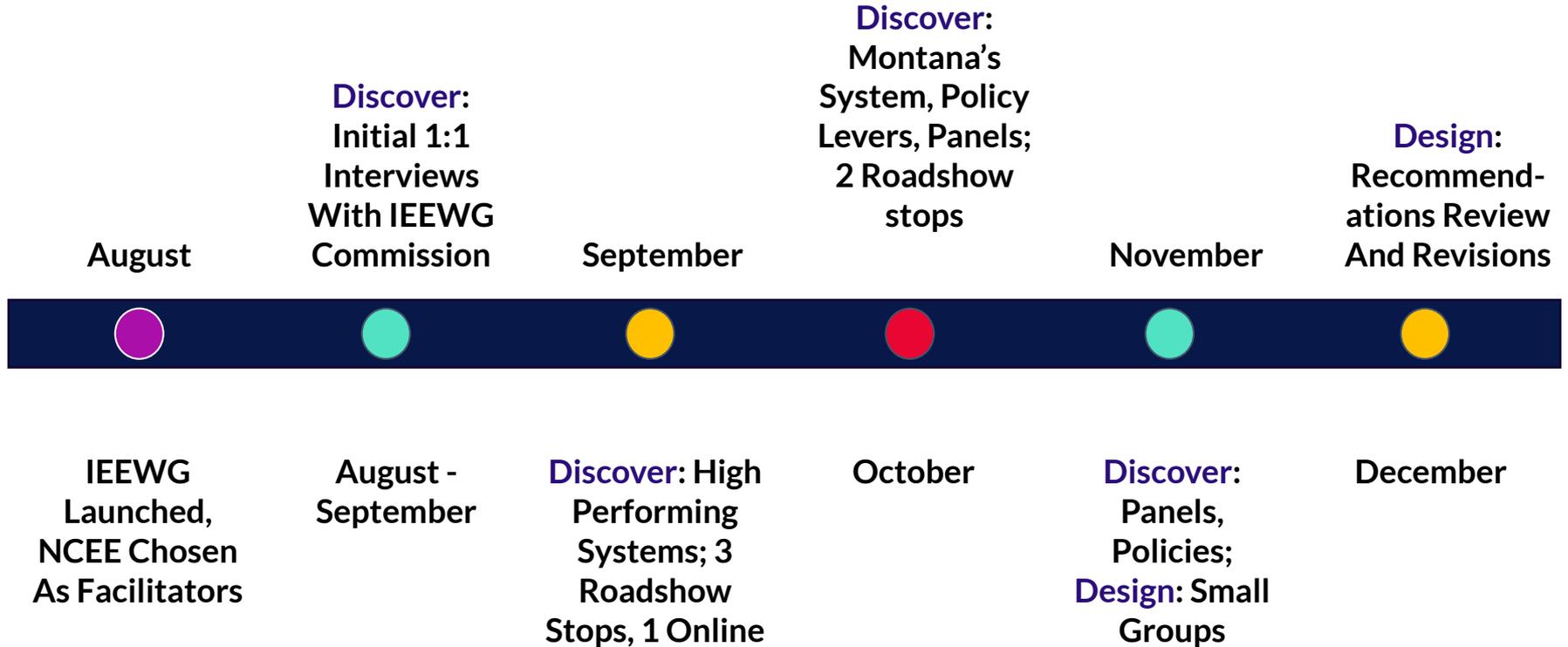
# The Journey To Date



**Purpose: Reviewing the process of developing the draft**



# How did we get here?



# January: The Final Report

1. Emma's Journey
2. Introduction: The Charge
3. Historical Context
4. The Case for Change
5. Montana's Goals and Performance
6. Challenges
7. Recent Efforts
8. Lessons from High Performing Systems
9. Systems Design Recommendations
10. Policy Recommendations and Implementation Plans

# Plan design features

## The plan is

- An initial plan to guide the implementation of the recommendations in the report
- Co-created by Commissioners and stakeholders (December 'small groups')
- Offers a time bound approach
- Specific proposed strategies and/or policy levers
- A plan that includes anticipated impacts

## The plan is not

- A reconsideration of the funding formula itself (Phase II)
- A binding, fully developed plan imposed upon the implementers
- An exhaustive compilation of all of the possible strategies



# Plan on 3 horizons

Three horizons allows policymakers to operate on two timelines: rigorous implementation now and future-forward observations approaching the next SFIC

**Next legislative session(s):** the actions that would need to occur to develop conditions and capacity and make initial implementation steps

**Five years from now: mid-implementation.** Anticipated efforts and impacts between plan enactment and the five year horizon

**Ten years from now: ongoing study of the system** – a description of what would be operating at the onset of the next SFIC

# Our Process Today

## Review System Recommendations

- Discuss open issues / questions and record notes

## Review Recommendations and Implementation Plan

- Discuss open issues / questions and record notes

## Review any final Discussion Questions

- Consider additions/revisions that the Commissioners would like to see included

## Consider Text Features and Final Touches

- Review final considerations such as costs, additional links, and any text features/graphics

# Reviewing the Recommendations



**Synthesizing input from the Commissioners**



# Recommendation Review Process



**Individually**  
Scan the discussion document (10 min)

**Whole Group**  
Dec. Small group members offer initial reflections

**Whole Group**  
Confirm no discussion is needed of the feedback already accepted to incorporate

**Whole Group**  
Discussion focused on questions regarding conflicting feedback and open questions

**Whole Group**  
Record resolutions and move forward

**Final**  
Open questions from NCEE

Please note the page and question numbers you'd like to discuss

# Systems Design



- Policy design features
- Performance management and monitoring design features
- Governance design features
- Infrastructure Policy Design Features
- Educational program design features
- Public engagement design features



# Systems Design Feedback: Overview

## Summary

- Appreciation for recommendations on simplifying funding and reducing reporting requirements
- Concerns about the lack of local control and specific definitions.
- Criticism of zero-based costing and the perceived absence of a coherent framework.
- Emphasis on the need for coordination and consideration of local governance, with some noting that repeated changes in the past have not improved outcomes.
- I believe they all overlap each other...
- Governance: Discuss how important setting this foundation is for effectively implementing the other recommendations.

## Common Ground

### Stakeholder Coordination and Engagement

- There is broad recognition of the importance of coordination in the system.
- There is a shared understanding that efforts need to be coordinated both vertically and horizontally to ensure that the system functions effectively.
- This common ground suggests that while there are differing views on how to achieve it, there is agreement on the need for a cohesive approach to system design.

# Systems Design Feedback: Discussion



Viewer  
version of  
feedback  
document

## Discussion items from feedback

- How should we address local control?
- Discussion of the role of funding in the report.
- Discussion of the “lack of simplification.”
- Discussion of the potential burdens of additional administrative work.
- Discussion of the challenges facing special education.

## Reflection from NCEE

- Why these systems changes? To raise the floor and the ceiling of the teacher, staff, student, and family experience.
- To increase state capacity to provide services to districts and reduce local burdens.

# Recommendations Transform Teaching



- **Strengthen Recruitment and Preparation Pathways**
- **Build a System of Real-Time Professional Growth**
- **Redesign School Staffing Structures**
- **Create Career Pathways that Retain Excellent Educators**
- **Support National Board Certification**
- **Develop a Continuum of Leader Preparation and Support**
- **Ensure Competitive Compensation**



# Transform Teaching Feedback: Overview

## Summary

- Some agreement with the comprehensive approach to improving the teaching profession, particularly the staffing redesign and NBCT sections.
- Concerns about the lack of discussion on professional pride, incentive pay, and the idea of year-round schedules.
- Several comments highlight issues with salary compression, suggesting it may disincentivize teacher development.
- There is interest in pathways to licensure and apprenticeship programs, but skepticism about consensus and implementation.
- Some respondents emphasize the need for local control and professional development opportunities, while others express concerns about licensure waivers.

## Common Ground

### Need for Teacher Support and Development

- There is excitement about initiatives like the registered apprenticeship program and internship opportunities for education candidates.
- These programs are seen as positive steps towards building a robust pipeline of qualified educators and ensuring that teachers receive the support they need to succeed in their roles.

# Transform Teaching Feedback: Discussion

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feedback  
document



## Discussion items from feedback

- How, within the Transform Teaching section, should we incorporate a discussion of local control?
- What are the Commission's recommendations for discussing the contributions of professional organizations and civic participation groups?
- How to assure that we are moving toward rigorous standards for educator prep programs and licensure pathways.
- How a compressed lifetime payscale is compatible with any of the aspirational teacher goals.”
- Ensuring we are including relevant stakeholders and initiative in the report, such as DLI and their teacher apprenticeship program
- How to assure that we are moving toward rigorous standards for educator prep programs and licensure pathways.
- How a compressed lifetime payscale is compatible with any of the aspirational teacher goals.”
- Ensuring we are including relevant stakeholders and initiative in the report, such as DLI and their teacher apprenticeship program

# Recommendations

## Early Childhood Early Learning



- **Update Funding Formulas To Include Early Childhood Education**
- **Provide Upfront Funding To Launch Early Targeted Intervention Programs.**
- **Provide Early Childhood Educators With High-Quality Professional Development And Instructional Materials.**
- **Establish A Single Suite Of Statewide Universal Screeners.**
- **Provide Transportation Reimbursement For Early Childhood Programming Participants.**
- **Create A Voluntary, Opt-In Early Learning Program.**



# Early Learning Feedback: Overview

## Summary

- Some respondents express skepticism about the necessity and cost-effectiveness of pre-K education, advocating for family-based care and questioning taxpayer funding.
- Others strongly support early learning, citing evidence of its long-term benefits and advocating for high-quality programs.
- Concerns are raised about funding formulas, transportation costs, and the readiness of current systems.
- Some suggest voluntary participation and emphasize the need for further evaluation and discussion of costs.
- There is also interest in supporting childcare providers and considering local control in educator salary structures.

## Common Ground

- Both sides acknowledge the importance of evaluating the costs associated with early learning programs.
- There is a shared understanding that a thorough assessment of current programs and funding formulas is necessary to ensure effective implementation.
- This common ground suggests that a detailed analysis of expenses, including transportation and universal pre-K costs, could help bridge the gap between differing perspectives.

# Early Learning Feedback: Discussion

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feedback  
document



## Discussion of feedback

- What are the Commissioners' recommendations for discussing the comment "All of the below recommendations seem to be premature. Early learning programs in Montana are just getting started, and we should evaluate the data before moving forward with such recommendations."

## Open Questions from NCEE

- How should we best incorporate the feedback regarding ANB calculations/per student funding calculations for ECE?

# Recommendations

## Learner Centered Design



- **Resolve And Reconcile Competing Definitions.**
- **Develop a Roadmap For Learner Centered Design.**



# Learner Centered Design Feedback: Overview

## Summary

- While some appreciate the roadmap for implementing proficiency-based learning, others find it lacking in actionable steps and specificity, particularly regarding agency participation and definitions of 'proficiency.'
- There is a call for better alignment with graduate profiles and a need for common language and goals.
- The section is seen as ambitious but challenging, requiring resources, ongoing education, and professional development.
- Some view the ideas as common sense, while others express concerns about the impact on educational outcomes.

## Common Ground

### Need for Clear Roadmaps

- The necessity of establishing a common language and shared goals to effectively implement learner-centered design.
- Achieving alignment in definitions and objectives is crucial for the success of this educational approach.
- The importance of collaboration and communication among educators, administrators, and stakeholders to ensure that everyone is working towards the same outcomes and understands the expectations.

# Learner Centered Design Feedback: Discussion



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feedback  
document

## Feedback discussion items

- I would like to see resource needs explicitly put into the horizons so it is obvious.
- Learner-centered models from other districts and how those districts train their staff and community.”

## Open questions from NCEE

- None

# Recommendations Pathways



- **Increase the Number of Funded Middle School Pathways Career Exploration Experiences.**
- **Increase Overall Funding For Middle School Pathways.**



# Pathways Feedback: Overview

## Summary

- Some respondents appreciate the focus on middle school.
- Others criticize the emphasis on middle school career exploration, suggesting it is premature and misaligned with existing programs.
- Concerns include the section's underdevelopment, lack of coordination with ongoing initiatives, and insufficient focus on academic skills.
- There is support for auditing current funding and caution about potential costs and risks. Overall, opinions vary on the section's objectives and implementation strategies.

## Common Ground

- The importance of preparing students for graduation and future careers, but they differ on the timing and focus of these efforts.
- Developing a balanced approach that integrates career exploration with academic skill development.
- Ensuring that middle school programs are well-coordinated with existing initiatives and that they do not overshadow essential academic learning.

# Pathways Feedback: Discussion

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feedback  
document



## Discussion of Feedback

- How can we recommend increasing overall funding for middle school pathways below prior to conducting an audit?
- Exclusion of high school from the report
- Note regarding class size

## NCEE Discussion Questions

- None



# Top Priority Discussion Topics

1. How to assure that we are moving toward rigorous standards for educator prep programs and licensure pathways.
2. Next steps on the funding formula and design to build capacity for clerks.
3. Discuss special education and EL student needs as a multiplier for funding.
4. How a compressed lifetime payscale is compatible with any of the aspirational teacher goals.
5. Curtail expansion of regulatory requirements; justification of expanded spending; acknowledge parental responsibilities/accountabilities; acknowledge, thru honest discussion, the mental health crisis and biological (hormonal) changes occurring during the teenage years.
6. I'd like to discuss student achievement using comparative, norm-referenced assessments (NAEP, ACT) to agree on a shared baseline, then identify the 2–3 most impactful recommendations we can execute in the next 12–24 months.
7. Narrow topics if possible and consider adding alternatives in the implementation section if studying the issue runs into roadblocks.
8. Learner centered models from other districts and how those districts train their staff and community.
9. Whether the group is comfortable with endorsing a path towards state-funded universal pre-k.



# Second Priority Discussion Topics

1. How realistic it is--and if it's NOT realistic, what next steps we can reasonably take so start moving in that direction.
2. I believe they all overlap each other. They are pieces to a puzzle and if something is missing it won't be complete.
3. I'd like to discuss school facilities and special education – both feel underdeveloped relative to their real-world budget and equity impact.
4. Focus on accounting primals vs fictions. Understand that while fictions are necessary, primals need to be viewed as the underlying reality driver.
5. Teacher pay and measurable student performance testing results.
6. The top and missing priority is simplifying and adding flexibility for schools on the funding formula.
7. The Governor has stated his goal of reducing income tax in MT. If that comes to fruition, how will it affect funding for education?
8. Narrow recommendations, if possible, and consider steps during implementation if funding measures are determined to be unfeasible.
9. Governance: Discuss how important setting this foundation is for effectively implementing the other recommendations.
10. Front Material: I have some suggested changes (as may others) that may spark a bit of conversation.
11. Ensuring we are including relevant stakeholders and initiative in the report, such as DLI and their teacher apprenticeship program



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