Introduction and Context

Emma's Journey

Imagine a student growing up in a small Montana community—let's call her Emma.

Emma enters a locally run early learning program at age four. Her parents are confident in the program because it is aligned with her elementary school and supported by the same educators and community partners they already know. Early screening helps teachers identify Emma's strengths in language and her need for extra support in early numeracy. Rather than labeling or tracking her, the system responds quickly—providing her teachers with detailed options for targeted, play-based instruction that builds her confidence and curiosity. Her teachers collaborate regularly, using shared tools and high-quality materials, and Emma's family receives clear, supportive communication about her growth. When her parents meet other families with young children in neighboring towns at community events, they learn that those children are getting similar instruction; some of them are in schools, and others in private or nonprofit programs.

By third grade, Emma's school day looks different than it did a generation ago. She has some whole group instruction for core skills, but mostly practices these skills in small groups on projects connected to her community—using her core math skills to analyze local water use, reading and writing stories based on tribal and regional history, and presenting her thinking through real world presentations and portfolios. Teachers still use multiple choice and short answer assignments, but these are in combination with a mix of online practice assignments that track her growth and target areas for improvement and paper-based writing assignments that look like real world writing, instead of five paragraph essays. Her teacher is part of a team that includes a mentor teacher, an apprentice educator, and a high school senior in an education pathway program, allowing for more individualized attention and deeper relationships. Professional learning happens in real time, embedded in the school day, rather than in disconnected workshops.

In middle school, Emma begins exploring her interests more intentionally. She joins a career exploration club focused on agriculture and natural resources, where she learns how science, technology, and business intersect in Montana's economy. What her parents experienced, once upon a time, as disconnected lessons on the water cycle, solving equations with variables, and word problems about money, Emma first learns in small groups and whole class instruction with online homework. She then demonstrates understanding through a group project helping local farmers project annual water bills for irrigation based on historic rainfall amounts and a five year trend. The culminating assessment includes questions about math and science and asks her to reflect on her learning in writing. Emma uses a learner dashboard aligned to Montana's Graduate Profile competencies—communication, collaboration, responsibility, resilience, etc—to reflect on her progress and set goals with her advisors. Her family can see this progress clearly and understands how school connects to real opportunities after graduation.

High school opens even more doors. Emma chooses a pathway that blends rigorous academics with hands-on learning in environmental science and renewable energy. She earns high school credit, college credit, and industry-recognized credentials while participating in internships with the local water purification plant and a firm bringing solar powered water pumps to rural Montana. Emma's math and science skills are off the charts, but she struggles with writing. Fortunately, because her school schedule is flexible, she is able to complete math and science classes in less than an hour a day and has extended time working with pathways students and apprentice

teachers in a writing lab both on-site and virtually so she can improve her writing skills. While Emma and her classmates are offsite at their internships or in skills labs with apprentice teachers led by other educators, Emma's AP environmental science teacher is in a webinar and discussion meetings with a Montana Digital Academy Nationally Board Certified Teacher who is facilitating a panel of life sciences professors and professionals on how to align the classroom curriculum with internship opportunities for a consortium of 4 eastern Montana counties.

When Emma graduates, she leaves with more than a diploma. She has a portfolio that shows what she knows and can do, credentials that matter in Montana's workforce, and a clear sense of her next steps. Emma will attend Montana State University–Northern where she will study technology in agriculture. Her internship with the solar company has become a part time job supporting user testing on an internet-of-things app that controls farm technology tools designed for family farms. Her family sees the return on their investment in public education, and her community benefits from a young person prepared to contribute and lead.

Emma's teachers love teaching and feel deeply valued as educators. Veteran teachers tell their apprentices "you don't know how good you have it" while co-developing small group lessons that arise from online quizzes and writing workshop conference notes. Younger teachers and apprentices share that they wouldn't have become teachers if they didn't have the supports they have in place now. The number of teachers staying past 10 years continues to rise, as working conditions, pathways for growth, and leadership opportunities that don't require teachers to leave the classroom are more available than ever. School and district policies are easier to understand because everything aligns with high quality core curriculum and the district graduate profile, which is on its third iteration – each one involving more student and community input than the last. Data systems have become more aligned and integrated, and administrators and clerks now spend more time in classrooms and supporting pathways programs and extracurriculars than chasing down missing attendance data and uploading incident reports. Businesses and local nonprofits propose new internships for students regularly and participate in online internship matching fairs without the superintendent having to call all the members of the Chamber of Commerce and the Rotary Club individually.

This is the promise of a learner-centered, pathway-rich education system—one designed to develop the full potential of every Montanan and to strengthen families, communities, and the state as a whole. One in which communities, families, and students are active participants in shaping learning that reflects Montana's values and future needs.

Introduction

Article X of the Montana state constitution provides Montana with extraordinary clarity regarding its educational mission:

> It is the goal of the people to establish a system of education which will develop the full educational potential of each person. Equality of educational opportunity is

> guaranteed to each person of the state. (2) The state recognizes the distinct and unique cultural heritage of the American Indians and is committed in its educational goals to the preservation of their cultural integrity. (3) The legislature shall provide a basic system of free quality public elementary and secondary schools. The legislature may provide such other educational institutions, public libraries, and educational programs as it deems desirable. It shall 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.

This clarity affords Montana the opportunity to set ambitious goals for education that support Montana's students in developing their "full educational potential." Such goals require thoughtful consideration of the system of education that serves Montana's students. This consideration must operate on two timelines, both holding a long-range vision for the system and operating with a clear understanding of the current system and the distance to travel to realize long-range vision.

Historical Context

The 2015-2016 School Funding Interim Commission was established in Senate Bill 128 by the 2015 Legislature to conduct what is often referred to as the "decennial study" of K-12 funding in Montana. The twelve legislators and four public members who made up the commission met six times between September 2015 and August 2016. With no appropriation to contract for an adequacy study, the commission charted its course after soliciting input from education stakeholders and the public via an online survey that garnered nearly 700 responses. The input received led the commission to focus on four areas of concern:

- Recruitment and retention—the commission was particularly concerned about the difficulties faced by rural schools and recommended revisions to the Quality Educator Loan Assistance Program and a study of K-12 employee health benefits.
- School facilities—the commission acknowledged that the revenue streams for state programs to support district facility investments have become unreliable and recommended strengthening revenue flow and revising the Quality Schools Facility Grant Program.
- Special education and special needs—the commission heard testimony as to the financial difficulties faced by districts and special education cooperatives and recommended an increase to the state special education payment and an increase to the appropriation for gifted and talented program grants, as well as further study of funding for all categories of special needs, including gifted and talented.
- District size, structure, and equity—the commission examined a number of issues but paid particular attention to differences in tax burdens between districts.

While few of the commission's specific legislative recommendations were enacted by the 2017 Legislature, many of the topics explored by the commission were addressed in the 2017 and subsequent legislative sessions.

In June and September 2022, the Education Interim Committee and the Education Interim Budget Committee jointly convened meetings of the "Constitutional Players" – those entities with authority to govern education under the Montana Constitution. Those entities are the Legislature, the Governor, the Board of Public Education, the Board of Regents of Higher Education, The Superintendent of Public Instruction, and Local School Boards. The meetings of over 30 state and local policymakers were cofacilitated by the National Conference of State Legislatures (NCSL) and the National Center on Education and the Economy (NCEE) based on those organizations' work in analyzing commonalities in high-performing education systems around the world. One of these common elements is "Coherent and Aligned Governance." The gathering of the "Constitutional Players" was in essence an effort toward this aligned governance (McCracken, 9/23).

By the end of the sessions, the Constitutional Players coalesced around four broad themes for educational change.

- Transforming the Teaching Profession and Retaining Effective Educators
- Early Childhood Education
- Proficiency-based Education
- Career and Technical Education

Numerous pieces of legislation were enacted to further those broad themes.

After the 2022 gatherings of the "Constitutional Players" and in the lead-up to the next decennial study, an additional charge was added to the School Funding Interim Commission. That charge was to convene an Innovation and Excellence in Education Working Group ("IEEWG") to first study Montana's education system itself. This expansion of the School Funding Interim Commission's charge to study both the needs and costs of Montana's education system led to Phase 1 of the 2025 School Funding Interim Commission.

The IEEWG was 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.

This report serves as the distillation of the 2025 IIEWG's study and contains the recommendations and implementation plan that emerged. With this report that provides recommendations and an implementation plan that continues Montana's pursuit of a future-forward education system, the School Funding Interim Commission is better positioned to

understand the investments necessary to further that aim, to ascertain its costs, and to examine the current funding gaps.

The Case for Change

The world has changed dramatically since Montana wrote its current constitution in 1972. Most Americans watched TV on three major networks, Montana's median home value was just over $18,000, and clerical workers, computer technicians, cooks, and cashiers were among the fastest growing occupations(BLS Report, Leon). Contrast that with today's world: Today's high schoolers have never known a world without learning constantly available at their fingertips through Google and other platforms (Quidwai, n.d.) and automation has reduced the need for three of the 1970's fastest growing occupations dramatically. Today's students will be competing globally for jobs as application designers, data scientists, and autonomous vehicle specialists. Students today have never known a world without the internet, without social media, and without streaming video. Just as the world around them has changed, so to have what the world needs from them as future contributors.

As machine learning and large language models ("AI") continue to automate tasks and processes, cognitive skills such as analytical and creative thinking are becoming more valuable, making human skills more critical than ever in an increasingly technologically-driven world. These human skills include not only core skills like the interdisciplinary fluency to solve complex problems and apply learning in new contexts. They also include the mindsets and practices that support long-life learning, personal fulfillment and well-being, and the contemporary skills that provide the foundation for success across a lifetime of professional and technological evolutions, and the community skills to engage responsibly, ethically, and empathetically in civil and social life.

These skills can only be developed in young people through cohesive, coherent, and highly aligned ecosystems of education and workforce development. Traditionally, many have thought of "college and career readiness" as two distinct tracks—college *or* career. In this world, young people need a foundation of both. They need the academic rigor to pursue education throughout their lifetimes and the applied, technical, and interdisciplinary skills to thrive in the workforce. And the dichotomy is breaking down further: people with college degrees need industry-recognized credentials, too.

Likewise, these skills are made more possible when developed in young people with a strong sense of positive mental health. And, yet, another dramatic indicator that the world has changed is the current state of youth mental health. In 2023, the Centers for Disease Control and Prevention reported that 40% of high school students experienced persistent feelings of sadness or hopelessness. Factors influencing mental health challenges include social isolation during COVID 19 that is linked to social anxiety, depression, stress, and negative impacts on cognitive development. Additionally, overexposure (over 3 hours a day) to social media is also associated with anxiety and depression. And finally, students who have adverse childhood experiences such as abuse and neglect are more likely to have poor mental health. There is a national shortage of the

specific mental health supports that can help students cope with these mental health challenges, as schools across the country suffer from a shortage of counselors and psychologists. Additionally, the lack of these professionals and other qualified staff may contribute to the lack of sufficient diagnostic mental health assessments, suggesting that the full scope of the mental health challenges students are facing is unclearly defined or understated.

Montana's goals and performance

Montana's state goal
Montana's primary educational goal is to fulfill its constitutional guarantee: "the goal of the people to establish a system of education which will develop the full educational potential of each person."

Student achievement
While Montana has made progress in improving student achievement, challenges remain. 2025 state assessments show that 43.1% of students in grades 3-8 are at or above proficiency in reading, while 36.9% are at or above proficiency in math. ELA subgroup scores range from about 62% at the top of performance, to about 12% at the low end of the score range. American Indian students on reservations are particularly struggling. Students not on reservations are 44.99% at or above proficiency, while students on reservations are 19.76% at or above proficiency. Montana also faces challenges in educating students with disabilities and English language learners (4.48% ELA proficiency). The 2024 graduation rate in 2023 was 85.6%, which is slightly below the national average of 87.4%. In terms of higher education achievement, 53% of 24-46 year olds held a postsecondary degree in 2024. According to the Lumina Foundation, Montana is among the top fifth of states where jobs requiring some postsecondary education or training are projected to make up more than 69% of available jobs by 2031.

Mental health
Montanans also report that Montana's students suffer from the national mental health crisis as well. Commissioners and residents alike cite the prevalence of screens, social media, and cyberbullying as factors in the mental health crisis. OPI reports that 25% of students have been bullied on school property and 19% have been electronically bullied. 51 of 56 Montana counties are designated as mental health professional shortage areas, which means they lack sufficient access to care.

Challenges

Inflation
Montana's economy has been highly impacted by the high inflation of the 2020s. While statewide inflation is comparable to the national average of 3 percent, Montana's core inflation rate, which focuses on more stable, longer term costs such as housing is 3.9%. This higher rate of inflation particularly impacts Montana, whose school district payments' adjustments for inflation are capped at 3%. This results in tighter budgets for schools, impacting what Montana's districts can afford to pay teachers and staff.

Teacher Shortages
In 2023, there were approximately 1,000 teacher vacancies to be filled. Montana's (state and private) universities only graduated 380 education graduates, a significant shortage in need of a systemic remedy. Additionally, there was a 12.5% teacher turnover rate from the prior school year. While Montana's districts work tirelessly to provide housing and to find educators to certify via emergency certification, structural changes to how Montana finds, trains, hires, and retains teachers will be necessary to meet the current and future needs for teachers.

Infrastructure
A recent report by the Montana Section of the American Society of Civil Engineers reveals that Montana's school infrastructure is in need of repair. 68% of Montana's K-12 schools were built before 1970, and volatile energy costs and declining enrollment have made operating these schools more expensive over time, contributing to underfunding for repairs and upgrades.

Governance
Montana is a proud local control state. This results in significant deference to education governance decisions on local districts. State governance agencies have significant responsibilities for data, assessment, accountability, accreditation, and support, but its policy tools for impacting student achievement outside of its core responsibilities are more diffuse in power: the state can promote and incentivize local districts, but ultimately many decisions are made at the district level. While it is often true that the local jurisdictions know their students best, it does not follow that statewide challenges should be addressed with numerous local approaches. Statewide challenges require formal but nimble statewide structures to achieve results.

Recent Efforts

Montana has made progress with many of these challenges. Recent legislatures have advanced numerous pieces of legislation to address challenges, making strides in improving educator compensation, revising accreditation standards to make Montana's system more student centered, increased programs for early childhood education, and continued investments in developing pathways to graduation.

Educator compensation
For example, the STARS Act's beginning educator payments have raised starting salaries. Superintendents credit STARS with reducing teacher attrition: the superintendent of Billings reported a reduction in teacher vacancies from 100 to 30. Additionally, the raises associated with the STARS Act help early career teachers cope with the generally lower salaries that early teachers face, helping make teaching more viable in the early career years.

Student Achievement
The successful introduction of early intervention for reading has led to an expansion into early interventions for math. This expansion has great promise for continuing to improve student readiness for kindergarten in both literacy and numeracy.

The Board of Public Education and Office of Public Instruction have also been working to modernize Montana's education system. The Board of Public Education approved a new accreditation process in 2023. Former Superintendent Arntzen, in announcing the new process, stated that "A focus on student learning and academic growth through quality teachers is a shift from the antiquated check-the-box system." In describing the role of the public, Superintendent Arntzen also shared that "Many Montana voices aided the development of this new student-centered process. This accreditation system emphasizes accountability and responsibility at the local level to put Montana students first." The accreditation process also mandates that districts develop and progress towards a Graduate Profile. The Office of Public Instruction has been supporting the development of the initiative. These Graduate profiles are developed at the local level and must be used to guide the district's Integrated Strategic Action Plan, with the intent of ensuring district efforts are tied directly to actions that will support the development of the qualities of a graduate the local community has said it desires for its young people. The new accreditation process and the necessary supports to ensure its success are positive developments that the state must consider when redesigning the funding formula.

Governance
Montana's convening of the Constitutional Players in 2022 resulted in numerous pieces of legislation on issues ranging from health benefits funding, teacher funding, and revamped district accreditation processes that move the state towards a more student-centered approach. Subsequent investments in data and accountability, statewide teacher salary adjustments, and increased investments in education to fund schools at the highest level in history are positive and promising efforts. Continuing to capitalize on these modernization efforts and expanding governance change to the systems and structures Montana uses to govern education can serve to increase the benefits of positive governance.

Lessons from high performing systems

Fortunately for Montanans, there are systems around the world that are delivering solutions to similar challenges and creating opportunities that capitalize on constantly churning changes. These systems are designed for young people to have multiple pathways to life after school and are long life learners. They are developing high-capacity, forward-thinking educators who ensure students graduate prepared for the future. They join forces across economic and civil sectors to ensure students thrive. And these systems themselves have cross-sector entities that help provide system coherence – entities that hide the complexities of many different institutions and processes from the casual observer and allow them to have a unified experience. (NCEE, 2024)

The IEEWG studied these characteristics as they manifest both in high - performing international systems such as Canada, Estonia, and Singapore and domestically in diverse states such as Pennsylvania, New Hampshire, New Mexico, and Utah. Commissioners consistently asked themselves and their consultants "How can we learn lessons from high performing systems that will allow us to fulfill our constitutional mandate?"

High performing systems ensure that their educators have a 'virtuous cycle of educator workforce policy.' Teachers are hired into systems of support that are designed to continue their mentorship and to promote their continued learning and growth. North Dakota is participating in Arizona State University's Next Generation Workforce initiative and developing a teacher apprenticeship program that uses strategic school staffing principles.

In early learning, high performing systems strive to make preschool accessible by making it free or highly subsidized, starting as young as age 3. Strong systems often use public and private providers, use play-based curricula administered by certified professionals, and hold public and private providers to the same standards for preschool educators. Ontario provides its 4 and 5 year olds with free, all day kindergarten. As a result, 98% of 5 year olds and 48% of 4 year olds are in full day kindergarten settings. New Hampshire was the first state to require play-based learning; now, they're providing resources to help ECE educators incorporate play every day in the classroom. Since passing the play-based learning law in 2018, the New Hampshire Department of Education partnered with the University of New Hampshire (UNH) to co-create a common definition, and develop workshops for ECE educators and providers to learn how to incorporate best practices in the classroom.

High performing jurisdictions provide career *and* college on-ramps from an early age. Elementary students participate in school based enterprises and service learning projects that dovetail with core academic classes, and project-based learning incorporates real world problems identified by employers, scientists, and subject matter experts into assignments. Students have career exploration opportunities in elementary and middle grades. In Vicksburg, Mississippi, the school district co-designed career pathways with local businesses and community members, including three career academies and an entrepreneurship pathway that supports student-led ventures through mentorship from civic leaders.

And throughout students' educational careers, across elementary and secondary school, top performers continue to emphasize excellence and equity for all learners. They ensure every student develops a solid learning foundation via dynamic and responsive learning environments. Key levers of such learning environments include high-quality curriculum, vetted and relevant materials, excellent teacher training and expert instruction, and tailored, timely assessment. The "special sauce" that drives success is alignment and coherence: top performers ensure that these various elements work together to become more than the sum of their parts. Washington State's Competency-Based Crediting Handbook offers school districts a framework to implement flexible crediting policies that allow students to earn credit by demonstrating mastery rather than completing seat time. Aligned with state graduation standards and aspirations for postsecondary readiness, competency-based crediting enables students to demonstrate proficiency through various experiences, including work-based learning or alternative education, helping them stay on track to graduate while gaining real-world skills.

And high performing systems think differently about systems leadership, working tirelessly to ensure the whole of their system is greater than the sum of its parts. The highest performing education systems in the world share a relentless focus on alignment. They coordinate their efforts vertically and across the wide range of partners necessary for student success. They engage in regular cycles of broad-based planning to track whether their change efforts are producing the desired results. When needed, they create systems structures that reach across organizational units and into stakeholder communities to identify key partnership opportunities, to mitigate weaknesses in system design through collaboration, and to formalize structures focused on accountability for outcomes. Maryland has established its Accountability & Implementation Board (AIB) as an independent unit of State government created to ensure that the Blueprint for Maryland's Future is implemented as intended (NCEE, 2024).

Given what we have learned from high performing systems and from the current state of Montana's systems for education, our recommendations for improving Montana's system of education so that it can better fulfill its constitutional guarantee will focus on the design features of the systems that support Montana's schools and on four topic areas: transforming teaching, early learning, pathways to graduation, and learner centered design. Our discussion of the design features is descriptive, not prescriptive: further discussion and deliberation will be needed to assign ownership of these recommendations in a manner that will lead to the desired outcomes, and also to suggest new systems structures to govern Montana's diverse education systems for recommendations that have no clear owner. As for the focus areas, the implementation plan provided here is also intended as a first draft to be refined through careful consideration with stakeholders.

Recommended design features of governance and implementation systems

Successfully implementing this report's recommendations will require ensuring Montana's education systems have the necessary infrastructure to launch, maintain, and continuously improve the new systems these recommendations indicate. These are discussed below as 'design features' of the education system - the qualities of the system that must be in place for the effective operation of the system once recommendations are implemented.

Before we discuss the specific features of the system itself, we must reinforce that the intent of the system redesign is to better equip Montana's education policymakers, policy implementers, education administrators, and educators with the tools, skills, and capacities necessary to fulfill their constitutional obligations. Additionally, these obligations will best be met if research on the practices of excellent systems – both at home and abroad – are matched with a deep understanding of the day-to-day experiences of Montana's educators.

High-performing systems are designed to learn. They assume that even well-designed reforms will require adjustment and therefore build in feedback loops, decision points, and opportunities to strengthen—or sunset—initiatives based on what implementation data reveals. Taken together, these design features reflect a core characteristic of high-performing systems: reforms are not launched and left to local interpretation alone, but actively stewarded through formalized, aligned governance, continuous, systematized collaboration, continuous learning, and shared accountability for outcomes.

These design features will span six different domains:

- Policy
- Performance management and monitoring
- Governance
- Infrastructure
- Education program design
- Public engagement

Policy design features

Revised policy infrastructures should simplify policy processes and accelerate policy implementation and facilitate practical, data-driven policy revision when material conditions impacting educators, students, and communities warrant those revisions.

- **Harmonized policy language and nomenclature.** At present, the language in legislation, rulemaking, and district policy across the state is misaligned. This process will be time consuming, as legislation will need to be drafted and passed, rulemaking will have to occur,

and district policies will have to be updated across the state. This will be a complex policy process, as it will involve using influence and incentives with each of Montana's school districts so that the state can have a single set of definitions.

- **Hard-coded policy 'triggers' should be written into enacting legislation.** These hard-coded triggers will have specific deadlines for specific actions and specific implementation actors. Possible hard-coded triggers may include but not be limited to legislating that recommendations are enacted in a specific sequence or that the chief implementers, such as the Board of Public Education, the Office of Public Instruction, and/or the Office of the Commissioner of Higher Education (OCHE) implement recommendations within a timeline or in a sequence. Another possible trigger could be "if specific metrics are not met on a given timeline, a justification and revised implementation plan should be written before further funds are released (many grants are structured this way). Any such triggers should be codesigned by policymakers and implementers, and not just handed down through legislation or policy rules. Conditioning the release of funding for any effort on the successful development of a plan with clear goals, key leaders and collaborators, action steps, milestones, and resources would be another such trigger.
- **Use zero based costing for new initiatives, but exhaust funding from current sources when finding pay-fors.** Zero based costing will provide accurate accounting for costs. Showing how current funding is applied before new funding is requested can build stakeholder confidence in calculations.
- **Account for specific costs for all students when updating the funding formula**, from Pre-K students to 21 year old students with disabilities. Currently, the funding formula does not include a specific calculation for pre-k4 students because they were not part of the formula in 2015. Consider different staffing ratios for different age students in any updates to the formula.
- **Consider the relationship between funding in grant programs and formula funding during phase 2.** Changes in the funding levels may affect preexisting legislation and programs to prevent wasteful spending and/or unintended consequences: For example, compare the impact of STARS future-ready payments on school budgets in the current model and in any proposed model to understand how changes will actually impact districts and their implementation of pathways programs.
- **Consider simplifying the funding formula and the funding mechanisms** for out-of-formula grants and other funding mechanisms by using common multipliers that are named in statute. For example, if there is a defined measure for inflation for educational costs, it should be named once in statute and be referred to as the standard measure of inflation throughout all written legislation and policy. Providing clear references and short formulas could improve public perception of the funding formula's legibility and increase legitimacy.

Performance management and monitoring design features

Performance management systems should elucidate the successes and challenges of educators and the communities they serve without burdening them with time-intensive reporting burdens that prevent action on understood issues. They should elevate day-to-day realities and provide

educators and policymakers with clear information upon which to make decisions and with which they can explain those decisions to Montana's residents. Most importantly, performance management systems should provide clear information about efforts in progress and their impact on their intended outcomes.

- **Sufficient capacity to conduct continuous improvement activities.**The state will need to maintain the ability to capitalize on early wins while recognizing implementation challenges early and changing course as needed. OPI, districts, and other intermediary groups such as special education cooperatives units will need the capacity to collect, analyze, report data, convert it to information, and drive decision-making both for academic programming and operational needs. The state has a compelling interest in providing appropriate access to accurate data consistently and on an ongoing basis. so that state agencies such as OPI, BPE, and the Legislature can make data-informed decisions. Non-state agency partners, such as professional organizations, contracted vendors, civic and nonprofit agencies will also request appropriate access to state data, and there will be many instances where it serves state interests to make this data readily available. Additionally, data will need to be collected carefully and with cybersecurity and privacy protections held closely. Montana's Education and Workforce Data Governing Board is one entity that could provide leadership in assessing capacity and articulating a path forward.
- **Clear processes for resolving reporting challenges that arise from policy changes.** OPI, along with the Education and Workforce Data Governing Board, will need to develop tools to identify, prioritize, and resolve challenges that districts have in collecting and reporting data. As policies change in response to these recommendations or other policy initiatives, districts will need to be able to flag problematic reporting structures, have them addressed by data governance, and be provided with resolutions so that the state can maintain accurate, timely data.
- **Clear performance-based 'on-ramps' and 'off-ramps' for recommendation implementation initiatives.** As conditions change in the state, the recommendations in this plan may result in successful efforts that have run their course, good ideas that new conditions render obsolete, or new conditions that demand newer, wiser options for improving Montana's education systems. Absent off-ramps and on-ramps, inertia may result in the maintenance of programs that are better off being replaced by more relevant efforts. The Working Group recommends that the capacities and systems to evaluate such choices be robust and continuously leveraged so new efforts can be launched with confidence, and unsuccessful or unnecessary efforts can be sunset with certainty.
- **Equality of opportunity checks.** Pursuant to the constitutional guarantee, performance management, monitoring, and evaluations systems must be able to evaluate whether or not implementation is advancing equality of opportunity across districts and schools in different geographical, economic, and cultural contexts. Absent specific indicators and look-fors to ensure this equality of opportunity, well-intentioned policy may not anticipate and/or correct for inequalities that arise from implementation challenges.

- **Identification of "innovation laboratories."** State capacity to monitor performance should be accompanied by the capacity to identify effective innovations, determine their cost-effectiveness and scalability, and share lessons learned with policymakers and educators to promote and perhaps prescribe effective practices. Outcomes such as student achievement, graduation rates, employment rates, wages, and enhancing equality of opportunity should all be considered for such innovation laboratory studies. Building additional capacity to monitor the implementation of transformational learning grants at the state level could jumpstart this process.

Governance design features

- **Coherent governance.** In order for the recommendations to result in the transformed system the Working Group imagines, the activities articulated in any implementation plan require vertical coordination from the OPI and BPE level through each implementing district and horizontal coordination across multiple state agencies including, but not necessarily limited to, OPI, BPE, the Legislature, The Department of Labor and Industry, and the Department of Public Health and Human Services. This may require new interagency agreements, new relationships, and new technological tools. The Working Group recommends that the legislature consider how the implementers might develop the necessary agreements, relationships, and tools to govern policy development in a manner that requires as few new arrangements as possible. The state should choose a clearly understood and measurable definition of governance from the growing body of research on state systems governance, and continuously monitor the system to maintain coherent governance.
- **Systems structures designed to coherently govern implementation.** New governance relationships should yield systems structures for governance and advisory entities that effectively turn data into information and then into action while implementing the recommendations. These entities need not be new state agencies or even necessarily new positions, but rather new combinations of state, private, and civic entities that can assume leadership over the implementation of a set of recommendations, call upon the necessary expertise to evaluate the quality of implementation, and correct course as necessary. Leadership in this sense includes the authority to require the implementation of the recommendations if they are to be effective. These systems structures must be appropriately and effectively engaged in defining, implementing, and distributing allocated funding to Montana's education system. They must coordinate implementers' efforts around clearly defined and well understood outcomes that flow from legislative intent, and agency rule-making should include bill sponsors in the process as current state law requires. Nevada established a standing Commission on Innovation and Excellence in Education, and Maryland established the Accountability and Implementation Board to govern its Blueprint for Maryland's Future efforts. Either could serve as a model for a core governing body.
- **Reconsider existing governance - don't just add new governance.** While Montana's local districts proudly cherish local control, allowing local final decisions need not require local

budgeting, staffing, and implementation. Policymakers, alongside district leaders, should examine the impact of current requirements and incentive structures for districts and determine if they will still be efficient, effective, or desirable after any changes to funding. For example, if the state is requiring a single suite of early learning screeners, requiring each district to find, fund, and follow-up on those screeners may be less efficient and effective than identifying intermediate-level entities to support implementation. Furthermore, allowing districts to enter narrowly tailored cooperative agreements may more effectively promote collaboration and resource sharing. For example, allowing a narrowly tailored countywide resource sharing agreement only for early childhood intervention programs may provide efficiencies and spur other types of countywide resource sharing agreements.

Infrastructure Policy Design Features

- Consider how any expansion in transportation services is funded and for whom. Consider programs such as payment in lieu of transportation ("PILOT," as used in Ohio and Massachusetts) for some students when it would be more cost effective without hurting student outcomes.
- Necessary infrastructure upgrades. Montana's significant infrastructure maintenance backlog will continue to provide districts with significant challenges without being addressed with funding. Consider how repairs to buildings and technology upgrades and maintenance costs will be addressed as the funding formula is studied. Also consider infrastructure costs alongside any recommendations in the report. For example, if the state mandated expansions of pathway programs, it could have a downstream result of requiring a district to weigh the cost of building a new lab on the school site, or using an off-site lab and funding transportation. Additionally, if you are going to use remote coaching with video feeds, you will need appropriate broadband connectivity. Considering such possible infrastructure impacts and the questions about cost incidence beforehand should be standard practice.

Educational program design features

- **High quality instructional materials.** A critical systems level commitment that will need to be carried through all recommendations is a commitment to High Quality Instructional Materials (HQIM). Some may question the placement of HQIM in this section of the report, but HQIM are critical both within each set of recommendations and across them, forming a set of standards for student and teacher materials that should be met throughout all four areas of recommendations. Additionally, HQIM should be available to all Montana learners, including English Language Learners and those who speak Tribal languages.
- **Student mental health and school culture.** Public engagement, panelist testimony from educators and students, and legislator comments during open meetings have drawn considerable attention to Montana's acute student mental health needs and poor school culture indicators (as measured by discipline incidents, chronic absenteeism, student

engagement, and teacher turnover, among others) as significant challenges in Montana. Montana must seek to understand what social forces (e.g. screen time, social media, etc) are actual drivers of perceived acute student mental health needs. From there, Montana can strive to understand how districts can more effectively impact student mental health within their communities while identifying forces that come from outside factors. Additionally, Montana should identify which currently existing supports for youth mental health can be brought to bear upon internal and external forces. Expanding the number of professionals who can conduct threat and risk assessments is one means of addressing more extreme risks, but new data collection and analysis capacities may be needed to understand less visible but more persistent mental health challenges. Cell phone bans are growing in popularity, but merely confiscating phones from bell to bell will not solve challenges of acceptance, belonging, and engagement that plague students whether they are carrying phones or not. Practitioners, students, and families should be included in this analysis and in the consideration of supports needed.

- **Consider the impact of the school year on Montana's education system.** Montana's education system continues to largely follow the traditional model with summers off. This model has challenges such as summer learning loss and the added costs to parents of providing care for long stretches of time. Additionally, teachers are typically paid as 10 month employees who then find part time or "gig work" in the summers. Montana should consider possible benefits of moving to a full year model with educators who are compensated as 12 month employees. A year round model could have benefits to student achievement, could provide opportunities for students to receive additional academic and mental health support, and could possibly better integrate pathways programs for older students alongside core academic work. While educators may not see dramatically higher numbers of instructional days, additional time receiving professional learning or teaming with fellow educators to meet students needs has potential return on investment. Montana should study such a move and consider the trade-offs.

Public engagement design features

- **Avenues for consistent public engagement.** Finally, Montanans expect that any new investments in the education system will be accompanied by processes and structures that can hold systems leadership accountable to the public. New public education and accountability forums and tools may need to be brought to bear so that Montanans are better equipped to understand the progress that has been made, help inform improvements to be made, and celebrate successes with their local communities and statewide, enhancing the legitimacy of the School Funding Interim Commission, the IEEWG, and the education system overall. These public engagement tools must effectively equip state legislators, local political leaders, and education leaders to effectively and accurately communicate the impact of changes in the system to stakeholders so that residents can make informed decisions regarding Montana's education systems.

Policy Recommendations and Implementation Plan

The IEEWG considered research from the National Center on Education and the Economy (NCEE) and the Organisation for Economic Cooperation and Development (OECD) on the performance, policy priorities, and system design of high performing systems worldwide. Then, Commissioners reviewed a representative sample of Montana's own education policies. The goal of this comparative analysis was twofold: (1) to understand how Montana's policies confer benefits and also (2) potentially create administrative burdens and other 'costs of implementation' that districts and schools incur while implementing these policies. Through this review process, four domains of education continuously emerged as areas to target for policy improvements:

- **Transforming Teaching,** which considers how to meet the changing needs of teachers and education leaders to retain them in the profession and help them to most effectively serve all learners.
- **Early Learning,** defined as Pre-K aged through 3rd grade for the Working Group's purposes.
- **Pathways to Graduation,** which is inclusive of traditional college, CTE, and other non-college pathways to employment.
- **Learner Centered Design,** which includes educational approaches such as proficiency based models and other designs that prioritize non-seat-time based metrics and involve learners as co-creators of their educational experience.

The Working Group also made connections between Montana's Graduate Profiles and their own consideration of the skills that Montanans will need to have to thrive now and in the future. The Montana Office of Public Instruction's analysis of the state's top 10 most common competencies listed in the graduate profiles statewide yielded the following list:

- Academic Excellence
- Citizenship/Global Citizen/Good Citizenship
- Collaborate/Collaborative
- Communication
- Community Minded
- Critical Thinking
- Integrity
- Life Long Learners/Life Long Learning
- Resilience/Strength & Resilience
- Responsibility/Responsible

These ten competencies include a deep foundation of basic academic knowledge and skills ("Academic Excellence," "Life long learners"), a set of skills that will aid students in an increasingly competitive world ("Communication," "Critical Thinking," "Collaborate/Collaborative") and skills

that balance personal responsibility ("Integrity," "Responsibility/Responsible") with civic responsibility ("Citizenship/Global Citizen/Good Citizenship," "Community Minded"). Together these form a "north star" toward which system design efforts can be directed.

The Working Group identified several system-level capacities that must be strengthened for Montana to achieve the shifts required to help all young people develop the competencies they need to thrive. These include more robust data management and monitoring systems, expanded training and technical assistance, and the ability to coordinate complex work across multiple state and local entities.

Ultimately, the Working Group considered the following proposition…

IF we:

- Compare the education policies of Montana with the policies of high-performing domestic and international educational systems;
- And develop recommendations to adapt the appropriate education policies of high-performing education systems for the public education system in Montana in these four domains:
    - Transforming Teaching
    - Early Learning
    - Pathways to Graduation
    - Learner Centered Design

While also:

- Keeping the top 10 competencies listed in Graduate Profiles as a north star, and
- Attending to the systems capacities necessary for system success
    - Data collection, management, and analysis,
    - Technical assistance and professional learning, and management
    - Public engagement,
    - Coordination and management capacities

Then Montana will more effectively provide a system of public education designed to develop the full potential of each person (as identified by the competencies contained in the north star) and guarantee equality of opportunity for each person of the state.

This report contemplates three time horizons for implementing the recommendations.

- **Horizon 1: creating conditions and capacity.** This time horizon includes research, planning, and policy development actions intended to enable governance bodies to help set parameters and vision with implementers, who then assume responsibility for implementation.

- **Horizon 2: implementation.** This time horizon focuses on implementation of programs and policies either as pilots or at scale, monitoring, and establishing continuous improvement routines.
- **Horizon 3: scale and monitoring.** During this time horizon, initiatives grow to scale, perhaps sunsetting if needed, and are regularly monitored and publicly reported. Supports are provided to districts, evaluations are conducted, and analyses are prepared to inform the next decennial commission.

This report is an initial draft intended to be improved upon through the legislative process, public engagement, and agency policy development. Additionally, because this report is a starting point, nothing should be limited by the four corners of this report. The School Funding Interim Commission brings many stakeholders into the conversation about Montana's education system, and it will draw out good ideas from many sources. It is possible that continued conversations will yield stronger, more effective means for implementing some of the recommendations and achieving the desired outcomes: The School Funding Interim Commission would welcome that development.

Transforming Teaching

Recommendations

By "transforming teaching," we mean creating a comprehensive continuum of support for educators—spanning preparation through retirement—that ensures teachers and leaders enter the profession well prepared, grow through embedded and relevant professional learning, and have access to meaningful career advancement without leaving the classroom will be critical to Montana's future.

In 2023, there were approximately 1,000 teacher vacancies to be filled. Montana's (state and private) universities only graduated 380 education graduates, a significant shortage in need of a systemic remedy. Additionally, there was a 12.5% teacher turnover rate from the prior school year.

Montana's ability to support young people to develop the competencies that will ensure they thrive in the future workforce depends fundamentally on the strength, stability, and support of its educator workforce. Forward thinking, high-quality educators are the single greatest factor influencing student outcomes, and the state's ability to attract, develop, and retain these educators depends on a coherent system that supports the full arc of their careers. This coherent system requires ongoing collaboration between the Montana University System, the Office of Public Instruction, and the Board of Public Education (BPE). This collaboration should have a formal structure co-designed by the participants and a refreshed suite of policy tools that can drive teacher recruitment, development, and retention outcomes.

Recommendations

a. Strengthen Recruitment and Preparation Pathways. Evolve teacher preparation and licensure pathways to meet the needs of Montana's schools and economy. This includes increased investment in high-quality teacher residencies and the expansion of apprenticeship programs that allow interested high school students to enter the profession earlier, with stronger preparation and without the burden of debt. Streamlining existing recruitment and preparation initiatives will also help reduce fragmentation and ensure efforts are aligned with long-term workforce needs.
b. Build a System of Real-Time Professional Growth. While improving recruitment and preparation is essential, Montana should place equal—and perhaps greater—emphasis on supporting educators once they enter the classroom. Professional learning should move away from "one-and-done" workshops conducted by disconnected providers toward embedded, real-time, in-classroom supports such as mentorship, coaching, and collaborative learning among master teachers and novice educators. This approach strengthens instructional practice, builds community, and supports early-career teachers at the moment they need it most.
c. Redesign School Staffing Structures. The traditional model of a single teacher with a single student class load is not yielding the desired results, and teacher vacancies and attrition continue to be cited as serious issues. In Montana, the average student-teacher ratio is less than 15:1, but that average is driven by the preponderance of small rural schools and obscures a ratio in larger schools at middle and high school levels of 25:1 or 30:1. Without attending to the structural conditions driving teacher shortages and the intersecting challenges of teacher isolation and large class sizes, Montana risks continuing to lose teachers. As an alternative, Montana should explore team-based models. These models, such as a master teacher supported by apprentices and specialists, must be agile and enhanced by appropriate technology to extend educator capacity, provide real-time training for apprentice educators, and offer increased opportunities for personalization to students. As an example, Arizona State University's Next Generation Workforce initiative has developed strategic school staffing models that, after initial implementation investments, are close to cost-neutral as compared to current staffing models and also dramatically reduce teacher vacancies while maintaining similar student/teacher ratios.
d. Create Career Pathways that Retain Excellent Educators. Educators value opportunities to take on leadership roles without leaving the classroom and these opportunities contribute to keeping the best teachers with students. Montana should expand access to roles such as mentor teacher, teacher leader, instructional coach, and teacher–administrator hybrid positions. These roles strengthen the profession, improve retention, and build a pipeline of future leaders by allowing teachers to grow while continuing to do what they do best—work directly with students.
e. Expand Support for National Board Certification. Montana currently provides assistance to teachers to obtain National Board Certification in the form of a stipend paid after the Certification has been earned. Currently, Montana has approximately 300 NBCT's, an

increase of approximately 130% since 2015 (127 NBCT's), raising Montana to the 20th highest state in terms of National Board Certified Teachers. This increase in highly skilled educators has advanced teacher quality in the state. Studies have shown that NBCT teachers provide between one and two more months of learning per student than their non-board certified peers. Montana NBCT's stay in the classroom and provide support as coaches to other teachers in the state. To further strengthen the educator workforce, Montana should provide stipends that cover the costs of National Board Certification. This program develops highly effective educators who often become leaders at the school and state levels. Given current salary limitations, the reimbursement model is not functioning as intended. A stipend—paired with a reasonable clawback provision for those who do not complete certification or remain in Montana for a minimum period—would expand access to this valuable professional learning opportunity. Increasing Montana's bench of expert educators who stay in the classroom and provide crucial professional learning can serve as a key strategy in teacher development and retention and could improve teacher and student outcomes.

f. Develop a Continuum of Leader Preparation and Support. A strong educator workforce requires a parallel continuum for school leaders. Administrator preparation programs should be closely aligned to educator practice standards and designed to recruit capable teachers seeking administrative roles into leadership pathways. When adopted alongside new strategic staffing models that elevate excellent teachers into new hybrid leadership role types, this systems-approach to school wide staff development could impact teacher and student outcomes. It is essential that high-quality, Montana-specific mentorship from experienced leaders complement classroom coursework. This system should support leaders from preparation through ongoing professional learning, mirroring the continuum provided for teachers. Ensuring that leaders have the skills, along with the time and resources, to regularly meet with teachers and support them in improving student outcomes is a critical need in Montana's educator development systems.
g. Ensure Competitive Compensation. All of the above must be anchored in a commitment to Montana's teachers earning a livable wage. Competitive teacher salaries will be critical in order for the state to attract and retain the high-capacity educators needed to fulfill its constitutional guarantee and realize the aspirations outlined in the statewide Graduate Profiles. Current compensation levels are not keeping pace with inflation, the cost of living, or compensation levels for other opportunities that would-be teachers are choosing instead of a career in education. State economists and national teacher compensation expertise should be consulted to determine educator salary scales that would be truly competitive in Montana's labor market. Without addressing this fundamental barrier, other recruitment and retention strategies will remain insufficient.

Implementation Plan

1. Strengthen Recruitment and Preparation Pathways

Horizon 1: Creating the conditions and capacity for enhanced recruitment and preparation pathways (years 1 and 2)

- BPE, in collaboration with OCHE, OPI, and other relevant stakeholders develop a comprehensive analysis of all current teacher preparation pathways in the state and conduct an analysis of their effectiveness by comparing them with high-performing systems and with regional neighbors. Use existing policy analyses from professional organizations such as NCTQ and MFPE to inform the analysis.
- Use stakeholder engagement to develop a nuanced, regionalized understanding of hiring districts' and potential teachers' needs and wants for teaching
- Combine the above analyses into a single assessment of the state of Montana's teacher recruitment and preparation pathways
- Promulgate any and all enabling policy to direct the appropriate entities to develop change plans based on the single assessment from horizon 1

Horizon 2: Implement new recruitment and preparation strategies (years 2-5)

- Use new policy to establish or strengthen a systems structure tasked with overseeing the health and effectiveness of Montana's educator lifecycle
- Implement new policies and programs based on the analysis from horizon 1. Consider funding pilot programs in different regions of the state to encourage change, accelerate learning, and inform more direct policy changes later in the process.
- Develop pilot marketing programs to increase awareness of the opportunities provided to educators by teaching in Montana.

Anticipated impacts: Increased understanding of teacher recruitment and retention challenges; the launch of new teacher pathways programs that start in high school and continue through college; increases in teacher preparation program enrollments, and decreases in teacher vacancies.

Horizon 3: ensure successful implementation of new strategies (years 5-10)

- Expand upon pilot programs based on successful early results.

- Have the educator lifecycle systems structure study ongoing improvement efforts and consistently make adjustments to recruitment, training, and retention strategies based on district, educator, partner, and IHE stakeholder feedback.
- Have the systems structure report on changes to teacher vacancy rates, graduates taking jobs in-state, measures of teacher quality and other teacher workforce measures that correlate to student outcomes.

Anticipated impacts: Increased awareness of Montana efforts to recruit and retain teachers, increased participation rates in teacher preparation pathways, reduced teacher turnover, and increased length of teacher tenure.

2. Build a System of Real-Time Professional Growth

Horizon 1: Create the conditions and capacity for a system of real-time professional growth (years 1-2)

- Commission a study of models of centralized professional learning used in other states that can serve as examples for a Montana-specific purpose built professional learning clearinghouse and technical assistance entity. Consider BPE and/or OPI as lead agencies.
- Develop a Montana landscape analysis of professional development providers, strengths, weaknesses, and opportunities and determine the best-fit model for Montana. Use existing analyses by reputable third parties and other agencies that have studied Montana to inform the analysis. Connect this analysis to the professional learning needs specific to designing learner-centered learning identified in Learner Centered Design recommendations.
- Promulgate any policy necessary to direct OPI, BPE, OCHE, and other relevant agencies to establish a professional learning clearinghouse that can ensure districts have 'one stop shopping' to obtain/support identifying needs, determining resources needed to meet those needs, and to make wise "make or buy" decisions for different professional learning needs. Provide start-up budget for this effort. Consider adding capacity to OPI's "Teacher Learning Hub" to serve this purpose.

Horizon 2: Implement effectively (years 2-4)

- Have the clearinghouse develop the necessary in-state partnerships and contractor relationships, if needed, to support the development of a comprehensive professional learning lifecycle aligned with learner centered design practices.

- Task the clearinghouse with identifying counterproductive professional learning requirements at both the state and district levels and recommending alternatives.
- Task the clearinghouse with studying collaborative approaches to providing professional learning at scale, such as interdistrict collaborative agreements, countywide systems, and district-to-district vendor models for providing professional learning.

Anticipated impacts: Increased opportunities for professional learning; fewer teachers reporting that they cannot access appropriate professional learning, increased opportunities for remote professional learning on high-need topics such as classroom supports for student well-being, multi-tiered systems of support, and learner centered design.

Horizon 3: Ensure ongoing effectiveness and continuous improvement (years 4-10)

- Require the professional learning clearinghouse to produce regular (e.g., biennial) effectiveness reports that analyze: Educator participation patterns by region, role, and experience level; alignment between professional learning offerings and statewide priorities (learner-centered design, MTSS, student well-being, pathways); correlations between professional learning participation and educator retention, instructional practice indicators, and student outcomes.
- Establish sunset and renewal criteria for state-supported professional learning initiatives based on demonstrated impact, educator uptake, and cost-effectiveness.
- Use educator feedback instruments and district reporting to identify persistent gaps in access, particularly in rural, frontier, and small districts, and adjust delivery models accordingly.
- Maintain a standing mechanism for districts and educators to propose emerging professional learning needs, ensuring the system remains adaptive rather than static.

Anticipated impacts: Professional learning offerings remain relevant, targeted, and aligned to system priorities. There is a measurable increase in educator satisfaction with professional learning access and quality along with evidence of stronger alignment between professional learning investments and improvements in instructional practice and student learning conditions.

3. Redesign School Staffing Structures

Horizon 1: Create conditions and capacity for redesigned staffing structures (years 1-2)

- Develop an “innovative school staffing” task force that identifies alternative school staffing models from other jurisdictions such as ASU’s Next Generation Workforce

Strategic School Staffing (which is operating in North Dakota) and Public Impact's Multi-Classroom Leader model can serve as examples.
- Promulgate any policy necessary to enable districts to pilot alternative models, including any regulatory waivers for teacher of record, data fixes, licensure requirements for alternative staffing models, or exceptions, etc.

Horizon 2: Implement strategic staffing models (years 2-5)

- Implement alternative staffing model pilots as part of existing or new grant programs with districts willing to serve as early adopters. Special consideration should be given to districts who have persistent teacher vacancies or an overabundance of emergency certified teachers and/or districts demonstrating great promise in using innovative practices.
- Leverage IHE offices and partnerships such as Montana State University's Center for Research on Rural Education to monitor and support the development of alternative models, particularly in rural areas.

Anticipated impacts: Development of promising alternative staffing models that serve diverse school types across Montana. Reduced teacher vacancies across the state.

Horizon 3: Assess effectiveness of pilots and promote scaling of strong options (years 5-10)

- Determine which models from pilot projects were successful enough to scale and understand the implementation startup costs to formulate Montana specific budget models for strategic staffing.
- Use incentives and school improvement tools to encourage districts – particularly districts struggling with teacher recruitment and retention, using high numbers of emergency certification educators, or suffering from persistent teacher vacancies.
- Study alternative models over time to assess model effectiveness, identify districts as likely candidates for alternative models, and use the strategic staffing task force to make recommendations to other governance and implementation entities to further the growth of strategic staffing.

Anticipated impacts: Montana develops a clear, evidence-based understanding of which alternative staffing models are effective, scalable, and cost-appropriate across different district contexts, enabling the intentional expansion of models that improve workforce stability and instructional quality. Districts adopting proven staffing structures experience sustained reductions in teacher vacancies, emergency certification usage, and educator

turnover, while strengthening collaboration and instructional coherence. At the state level, policy and funding guidance are aligned to support strategic staffing as a durable workforce strategy, improving educator access for students statewide and increasing the system's capacity to respond to ongoing recruitment and retention challenges.

4. Create Career Pathways that Retain Excellent Educators

Horizon 1: Create the conditions and capacity for educator career pathways (years 1–2)

- Conduct a statewide inventory of existing educator leadership roles (e.g., mentor teacher, instructional coach, teacher leader, hybrid teacher–administrator roles), including role definitions, eligibility criteria, compensation structures, and time allocations.
- Identify policy, licensure, and funding barriers that limit districts' ability to create or sustain meaningful educator career pathways, particularly in small and rural districts.
- Engage educators, administrators, and professional organizations to define a coherent set of model educator career pathway roles aligned to system priorities such as mentoring novice teachers, supporting learner-centered design, and improving instructional quality.
- Develop model role descriptions and guidance that districts can adapt to local context.

Anticipated impacts: Montana establishes a clear understanding of existing educator leadership roles and identifies the policy and structural barriers that limit their effectiveness and scalability. A shared set of role definitions and expectations creates the foundation for coherent, district-adaptable educator career pathways statewide.

Horizon 2: Implement and refine educator career pathways (years 2–5)

- Enable districts to pilot and expand educator career pathways using model role definitions, supported by state guidance and technical assistance.
- Align educator career pathways with other Transforming Teaching strategies, including professional learning systems, strategic staffing models, and National Board Certification.
- Support districts in designing schedules, compensation supplements, and workload adjustments that make educator leadership roles sustainable and impactful.
- Collect participation and implementation data to understand uptake, distribution, and early effects on retention and instructional support.

Anticipated impacts: Districts expand access to meaningful educator career pathways that allow excellent teachers to grow professionally while remaining connected to classroom practice. Educator leadership capacity increases, particularly in mentoring, instructional

improvement, and support for new teachers, contributing to early improvements in retention and job satisfaction.

Horizon 3: Assess effectiveness and sustain high-impact pathways (years 5–10)

- Evaluate educator career pathways over time to assess their impact on teacher retention, leadership development, instructional improvement, and workforce stability.
- Monitor equity of access to educator career pathways across regions, school sizes, and grade levels.
- Refine role definitions, eligibility criteria, and support structures based on evidence of effectiveness and educator feedback.
- Use findings to align funding, policy, and professional learning systems with educator career pathways that demonstrate sustained value.

Anticipated impacts: Montana sustains a set of evidence-based educator career pathways that improve retention of highly effective teachers, strengthen instructional leadership, and build a more resilient educator workforce. These pathways become a durable component of the state's educator lifecycle system, supporting continuous improvement while respecting local context and needs.

5. Expand Support for National Board Certification

Horizon 1: Create conditions and capacity for increased support (years 3-4)

- Study the impact of new funding and other first-order changes to educator preparation and retention on NBCT program participation.
- Determine whether such reforms are impacting NBCT program participation positively, negatively, or having no impact.

Horizon 2: Implement revised NBCT stipend policies (years 4-6)

- Determine what, if any, policy changes are needed to increase NBCT numbers to the desired level to meet the needs for teaching, mentoring, and educator development
- Develop a policy mechanism to fund the up-front payment to educators pursuing NBCT status: interest free, deferred payment loans are one option.

Anticipated impacts: Increased number of teachers pursuing National Board certification; increased student achievement in NBCT classrooms, and increased number of NBCT mentors and coaches for novice teachers

Horizon 3: Ensure ongoing effectiveness (years 6-10)

- Continue to track NBCT application and attainment to ensure the policy is resulting in increased NBCT teachers
- Analyze student data to determine what impact NBCT teachers are having on student achievement and teacher retention rates. Consider analyses that compare schools and districts with NBCT teachers to those without and see if there are lessons learned

Anticipated impacts: Increased number of NBCT candidates; increased number of candidates from districts with lower average salaries, positive student and teacher outcomes resulting from NBCT participation

6. Develop a Continuum of Leader Preparation and Support

Horizon 1: Create the conditions and capacity for a coherent leadership continuum (years 1–2)

- Conduct a statewide analysis of existing school and district leader preparation programs, induction supports, mentorship structures, and ongoing professional learning opportunities.
- Identify gaps, redundancies, and misalignments between leader preparation programs, licensure requirements, district needs, and system priorities such as learner-centered design, educator development, and strategic staffing.
- Engage stakeholders—including current school leaders, preparation providers, and professional organizations—to define a *shared vision for leadership competencies* aligned to Montana's instructional and workforce goals.
- Identify policy, licensure, and funding barriers that limit the development of a coherent leadership pipeline, particularly for rural and small districts.

Anticipated impacts: Montana establishes a clear understanding of its current leadership preparation and support landscape and identifies the structural and policy barriers that limit coherence and effectiveness. A shared vision for leadership competencies creates the foundation for a statewide continuum that better aligns preparation, practice, and professional growth.

Horizon 2: Implement aligned leader preparation and support strategies (years 2–5)

- Align leader preparation programs, licensure expectations, and mentorship structures to the shared leadership competency framework.

- Support the development or refinement of leadership induction and mentoring models that pair new leaders with experienced mentors, prioritizing Montana-based when possible.
- Integrate leadership development with other Transforming Teaching strategies, including educator career pathways, professional learning systems, and strategic staffing models.
- Provide guidance and technical assistance to districts to strengthen leadership supports, particularly in districts experiencing high turnover or persistent workforce challenges.

Anticipated impacts: Leadership preparation and support systems become more coherent and better aligned to district and school needs. New and aspiring leaders are more consistently prepared to support instructional improvement, educator development, and learner-centered models, contributing to early improvements in leadership stability and effectiveness.

Horizon 3: Assess effectiveness and sustain a strong leadership pipeline (years 5–10)

- Evaluate leadership preparation and support systems over time to assess impacts on leader retention, school stability, instructional leadership, and educator workforce outcomes.
- Monitor equity of access to high-quality leader preparation and mentoring across geography, district size, and school context.
- Refine leadership competencies, preparation pathways, and support structures based on evidence of effectiveness and feedback from leaders and districts.
- Use findings to align policy, funding, and professional learning systems to sustain leadership pathways that demonstrate long-term value.

Anticipated impacts: Montana sustains a coherent, evidence-based continuum of leader preparation and support that improves leadership stability, effectiveness, and equity statewide. Schools and districts experience reduced leadership turnover and stronger instructional leadership capacity, particularly in rural and hard-to-staff communities. Over time, leadership preparation, licensure, mentoring, and professional learning systems are better aligned, strengthening the educator workforce and supporting consistent, high-quality implementation of statewide education priorities.

7. Ensure Competitive Compensation

Horizon 1: create the conditions and capacity for competitive compensation (year 1)

- Conduct a competitive salary study that compares Montana's baseline educator salaries in line with the jobs that are hiring Montana's would-be teachers.
    - Include salaries in Montana and neighboring states

    - Include salaries for professions that would-be teachers are choosing instead of teaching in Montana and neighboring states
    - Develop a more competitive statewide compensation 'template'
- Consider interactions between any new funding and incentives for pay such as STARS Act and Qualified Educator payments with the goal of creating as simple a teacher compensation model as possible without removing the incentives to districts that these policies have provided.
- Use the compensation template to inform the funding formula.

Horizon 2: Modify funding to enable competitive compensation (years 2-5)

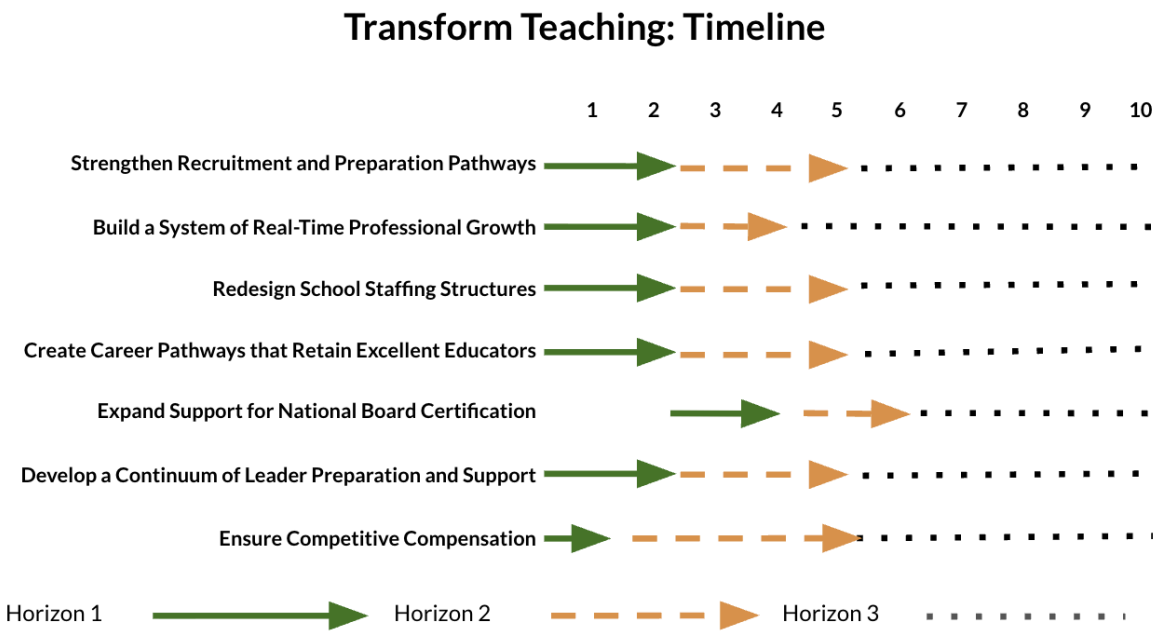
- Use legislation and other policy to enact the changes to funding that enhances educator salary competitiveness with competing state professions and neighboring state educator salaries.
- Direct BPE and OPI to leverage partnerships with professional organizations to educate local districts on changes to funding and how it can be leveraged to enhance educator salaries.
- Use state technical assistance providers and professional learning partnerships to continue to support districts with implementing funding changes, sharing strategies from districts experiencing success and satisfaction with similarly situated districts

Anticipated impacts: Montana's educators will have a more competitive salary that contributes to increased educator retention and reduces teacher turnover and vacancy rates.

Horizon 3: Ensure ongoing effectiveness (years 5-10)

- Study the impacts of competitive compensation on educator success outcomes including, but not limited to:
    - Teacher retention and turnover
    - Vacancy rates
    - Teacher satisfaction surveys
    - School board and administration feedback on affordability
- Using professional learning reporting capacities, provide regular (annual?) updates on educator workforce health via dashboards, reports, and testimony in front of the relevant legislative bodies and distribute this information to stakeholders. Minimize reporting bloat by combining with professional learning data reporting.

Anticipated impacts: Increasing adoption of successful compensation strategies across similar districts, continued positive movement in the horizon 2 educator outcomes.



Early Learning

Recommendations

Montana's early childhood education sector has seen promising developments intended to support early learning through third grade and beyond, and should continue to develop programs that prepare the youngest learners for strong early elementary education programs. The targeted intervention for literacy programs are bearing results and expanding to math. These can be seen as proof of concept for early childhood intervention more broadly. High-quality investments in early learners benefit not just three and four year olds, but also contribute to more effective elementary education. A research review by the Learning Policy Institute found that well-designed early childhood programs have numeracy, literacy, and social/emotional benefits for program participation that extend into elementary school and can even persist into adulthood. Returns on investment for high quality ECE programs range from $2 of return for every $1 spent, to $17 of return for every $1 spent. In short, investments in early childhood education, when paired with strong elementary programs, benefit all learners and also have benefits for the families provided those opportunities.

Recommendations

1. Update Funding Formulas To Include Early Childhood Education. Current policy is not equipped to address the needs of early learning programs because early learning programs

did not exist when the formula was developed. Staffing ratios, program requirements, and facility requirements are all different for early learning programs, and need to be incorporated into the funding formula.

2. Provide Upfront Funding To Launch Early Targeted Intervention Programs. At present, districts that want to develop a district-run early targeted intervention program are subject to a reimbursement-based and enrollment-driven system that uses calculations and formula multipliers that no longer adequately consider the different cost-drivers of educating students with different needs at different age-levels–or the specific needs of early learners in particular. This system creates a barrier to entry for any district that does not have the fiscal reserves to cover all start-up costs for an in-district targeted intervention program. Early learning programs require the hiring of staff, modernizing facilities, and screening students before beginning services. Providing up front funds to support the development of targeted intervention programs can reduce or remove this barrier to entry and ensure more students needing early intervention receive it.
3. Provide Early Childhood Educators With High-Quality Professional Development And Instructional Materials. These materials should meet the needs of the students who will enroll in the early learning programs in the next 10 years – particularly English language learners. Providing high quality instructional materials and the related professional learning will promote the effective implementation of early learning programs.
4. Establish A Single Suite Of Statewide Universal Screeners. Universal screeners for literacy and numeracy, school readiness, dyslexia, developmental delays and disabilities, and language proficiency can ensure all early learning programs have the necessary and appropriate information to serve early learners effectively, create more consistency in the experience and maximize the gains for the students: Effective developmental screeners can identify learning needs such as school readiness, supports and dyslexia, and can help educators determine how to strategize to meet these needs. The use of standard screeners also ensures that teachers and leaders are well prepared to administer the screeners and maximize their potential. By using screeners and post-intervention assessments, early learning program providers can continuously improve the program design and learn from one another.
5. Provide Transportation Reimbursement For Early Childhood Programming Participants. Similar to the funding formula, the current transportation funding formula does not include 4 year olds. Including transportation reimbursement for 4-year olds creates the conditions for more young people across the state to take full advantage of education opportunities.
6. Create A Voluntary, Opt-In Early Learning Program. Limiting early childhood offerings to screened-in early learners in need of intervention creates several administrative burdens

that expansion could resolve. Currently policy requires completion of this screening process prior to beginning programming. Finding prospective students, screening them, and admitting them prior to beginning services is administratively difficult and can result in a single classroom only serving 1-3 students, when capacity is much greater (at least 1:10, according to the NAEYC). Revising policy to allow extra capacity to serve a greater number of students reduces the per-pupil costs, allows for less up-front administrative means-testing costs, and maximizes the return on investment for the local district. Furthermore, allowing the program to admit students up to the current capacity cap of the number of teachers serving intervention students would allow for year round screening and admission, further reducing start-up needs, and preventing the inflation of per-student costs, as well as the risk of leaving students and communities underserved.

7. Continue To Support Community-Based Programs. In partnership with Kindergarten-serving districts, support those who currently provide ECE services that align with elementary school needs and goals: use community-wide approaches when considering establishing new programs and provide support for conducting cost-benefit analyses of developing in-house programs in districts. Consider impacts on community-based providers, and provide resources to help them stay in business as a part of an ecosystem of service so that early childhood care and education markets are only temporarily disrupted by new programs.

Implementation Plan

1. Update funding formulas to include early childhood education

Horizon 1: Create the conditions and capacity for adequate funding (years 1-2)

- Throughout phase 2 of the SFIC, develop a cost model for early childhood targeted intervention programs that follows the K12 methodology as closely as appropriate.

Horizon 2: Implement the new funding model (year 2-5)

- Implement the funding changes for ECE programs with current and new programs.

Horizon 3: Ensure ongoing efficacy (years 5-10)

- Study the implementation of the new funding model, considering factors such as: changes in program growth (i.e., how do new programs initiated after the funding formula updates compare, demographically, to earlier programs?) Consider geography, percentage of typically underserved populations, and other factors.

Anticipated Impacts: Kindergarten readiness and kindergarten literacy and numeracy scores increase for participating students. Increasing percentage of Montana 4 year olds participate in ECE programs. Community-based programs that meet quality standards for program design increase as they integrate targeted intervention programming into their models.

2. Provide upfront funding to launch early targeted intervention programs

Horizon 1: Create the conditions and capacity for early targeted intervention startup costs (years 1-2)

- Use cost modeling from the SFIC phase 2 to develop a "startup cost estimator" tool that uses universal cost drivers for high quality early childhood programs (as defined by best practice and codified in BPE standards and adjusts for actual local costs using an accurate, valid, and legitimate multiplier such as Montana Department of Commerce regional data.
- Pass enacting legislation and engage in subsequent policy development to formalize the start-up funding program.

Horizon 2: Implement (years 3-5)

- Using the cost estimator, determine the appropriate policy vehicle (grants, interest free refundable loans, etc.), the appropriate funding amount, and the appropriate funding program (e.g., the Montana Delivering Local Assistance Program).

Anticipated impacts: Startup funding is allocated to support the growth of new programs. New program growth rate exceeds that of program growth prior to the grant program's passage.

Horizon 3: Ensure ongoing efficacy (years 5-10)

- Use up-to-date cost and regional cost differentiator information to adjust startup funding for new programs.
- Measure the effectiveness of the program overall. Define factors that might influence expansion of the program to grow additional program 'slots' for preexisting programs to access grant funds to expand to meet need.
- Monitor the long-term effectiveness of the program and determine success metrics that will allow the targeted ECE start-up funding program to sunset or to merge with other grant funded programs.

Anticipated impacts: Increased program development in regions with less program participation. Improved outcomes for program participants across the state.

3. Provide Early Childhood Educators With High-Quality Professional Development And Instructional Materials

Horizon 1: Create the conditions and capacity (years 1-2)

- Determine if there are ECE labor policies that are not under the aegis of the Office of Public Instruction and develop a plan to align all ECE accreditation/certification program standards across all agencies.
- Pass enacting legislation and or complete any and all necessary policy promulgation.

Horizon 2: Implement the recommendation effectively (years 3-5)

- Implement this recommendation as part of new teacher development programs. ECE educators should be treated as equals to other certified and certification -track educators with respect to their learning and development, even as they sit on different salary scales. Training and development for early childhood education should be aligned with training and development for k-12 education to ensure coherence. Ensure standards for effective early childhood programs are met.
- Develop any recommendations for ECE High Quality Instructional Materials (HQIM) alongside other HQIM efforts, ensuring curriculum coherence horizontally across communities and vertically within K12 feeder patterns. Ensure all HQIM standards are met, as well any standards for effective early childhood programs.

Anticipated Impacts: Increases in ECE program performance as measured by literacy, numeracy, and kindergarten readiness measures. Increases in ECE program quality indicators (as defined by OPI, based on best practice).

Horizon 3: Ensure ongoing effectiveness (years 5-10)

- Track long-term impact of ECE program participation on student, school, and district success outcomes including literacy and numeracy scores, student climate indicators, and other indicators of program effectiveness. Use state-level data on program effectiveness to determine subsequent investments in ECE program expansion.

Anticipated Impacts: Improved elementary literacy and numeracy outcomes, improved school culture indicators.

4. Establish A Single Suite Of Statewide Universal Screeners

Horizon 1: Create the conditions and capacity for effective implementation (years 1-2)

- Develop a list of all types of screeners necessary to assess prospective recipients of targeted intervention effectively (kindergarten readiness, developmental screeners, literacy and numeracy screeners, etc.)
- Direct BPE to select and formalize the implementation of a single statewide suite of screening tools–one screener for each necessary area of investigation– to be used by all affected Montana Early Childhood providers. Align all state policy language for ECE screeners. Consider:
    - Screener effectiveness
    - Screener training and development requirements for effective implementation
    - Funding impact on providers governed by this new requirement.

Anticipated impacts: Policy language, program requirements and funding, and the screener selection are all aligned.

Horizon 2: Implement efficiently and effectively to maximize outcomes (2-5 years)

- Set a deadline for the effective implementation of the screeners at all ECE programs under the jurisdiction of this enacting legislation within X months of the legislation's passage.
- Path to scale: Empower the intermediary, under the leadership of OPI, to implement the new screener policy with concrete deadlines for adoption for existing and new programs.
- Provide all programs with the resources to acquire screeners and training, balancing efficiency and effectiveness. Consider administrative burdens on programs as implementation costs and spread costs across the parties impacted in the workplan.
- Continuous improvement: Develop a systematic approach to understanding implementation challenges and solutions to those challenges, and develop a technical assistance function to support the implementation of the new screeners.

Anticipated impacts: All existing ECE programs in Montana have migrated to the new universal screener no later than the first day of school two years after policy adoption.

All new programs established more than one year after policy adoption will use the universal screener. Funding for the use of the screener and reporting for the screening program is provided effectively and in a clear, coherent, understandable manner.

Horizon 3: Ensure ongoing efficacy and excellence until the next Decennial Study (years 5-10)

- **Governance:** The systems structure overseeing education effectiveness receives and publicizes reports on program effectiveness at regularly determined intervals. These reports include progress, challenges, and recommendations for program alteration.
- **Performance Management:** OPI and its implementation partners collect, analyze, and share data and resulting actions with the public and the legislature through regular channels at predetermined intervals.
- **Stakeholder Engagement:** OPI and its partners maintain consistent and ongoing communication with stakeholders (other agencies, ECE experts), including local implementation partners (schools, community programs, district Trustees), and use stakeholder impact analyses to inform reports to the IEE Commission and/or other relevant governance bodies.

Anticipated impacts: Montana's publicly funded ECE programs feed a common data set of ECE participating children's well-being and use this information to inform ECE and Early Elementary program design, instructional materials and strategies, and educator development initiatives. ECE programs grow to scale.

5. Provide Transportation Reimbursement For Early Childhood Programming Participants

Horizon 1: Create the conditions and capacity for 4 year old transportation (years 1-2)

- Use program participation data and projected program growth data to develop a cost model for providing transportation for 4 year olds. Consider payment in lieu of transportation (PILOT) and other alternatives to busing as options.
- Develop and pass any necessary legislation and promulgate any additional necessary policy.

Horizon 2: Implement policy (years 2-5)

- Provide transportation to 4 year olds and track transportation usage.

Anticipated impacts: Programs will have increased program enrollment and more consistent attendance.

Horizon 3: Ensure ongoing effectiveness (years 5-10)

- Track transportation participation data and compare program enrollment, attendance, and outcomes for transportation-using participants. Additionally, study the demographic data of students using transportation and determine how transportation is impacting program goals.

Anticipated impacts: Increased enrollment, higher average attendance and less chronic absenteeism in ECE programs, and learning gains associated with consistent program participation.

6. Create a voluntary, opt-in early learning program

Horizon 1: Create the conditions and capacity for an opt-in program (years 2-5)

- Commission a study to determine whether or not expanding the targeted intervention program to allow districts to fill 'slots' not used for intervention would improve the state's ability to meet its constitutional obligation and also improve both pre-K and elementary school outcomes. Also study whether an opt-in program will induce more districts to provide intervention programs, enhancing opportunity for students who need it.
- After the completion of the study, determine if this opt-in program is the most favorable means of expanding pre-K education in Montana.
- Promulgate legislation and or any and all other policies needed to allow local districts to fill extra early childhood slots not being used for students in need of intervention, but disallow expanding programming to create new seats.

Horizon 2: Implement the opt-in program (years 5-7)

- Define a timeline with concrete 'triggers' for allowing this recommendation to go into effect, with a deadline for studying feasibility and potential impact on budgets and on long-term student outcomes.
- Require districts to establish and publish criteria and ranking factors, including lottery policies if needed. The state should provide districts with model policy to adapt for local conditions.
- Set targets for districts to open an 'opt-in' program. Districts should not open additional slots until they can demonstrate they will be able to meet intervention program demand

and goals, and to expand slots without sacrificing program quality. Compare performance data from opt-in participating programs and non-participating programs.

Anticipated impacts: Increased program enrollment and resulting program outcome measures. Increased ANB costs to the state and local communities.

Horizon 3: Ensure program effectiveness (years 7-10)

- Study program implementation to determine optimal opt-in program size to serve students in need of intervention and to serve further community demand. Adjust program size and consider revisions to funding for the opt-in program to ensure tax fairness across state communities.

Anticipated impacts: Increased program enrollment and participation; improved elementary academic outcomes, and reduced achievement gaps for demographic groups that are overrepresented in targeted intervention programs.

7. Continue To Support Community-Based Programs

Horizon 1: Create the conditions and capacity (year 1-2)

- Provide resources to the appropriate agencies to conduct impact analyses on local ECE providers
- Use impact analyses to recommend policy fixes to disruptions in the local care markets

Horizon 2: Implement policies (year 3-5)

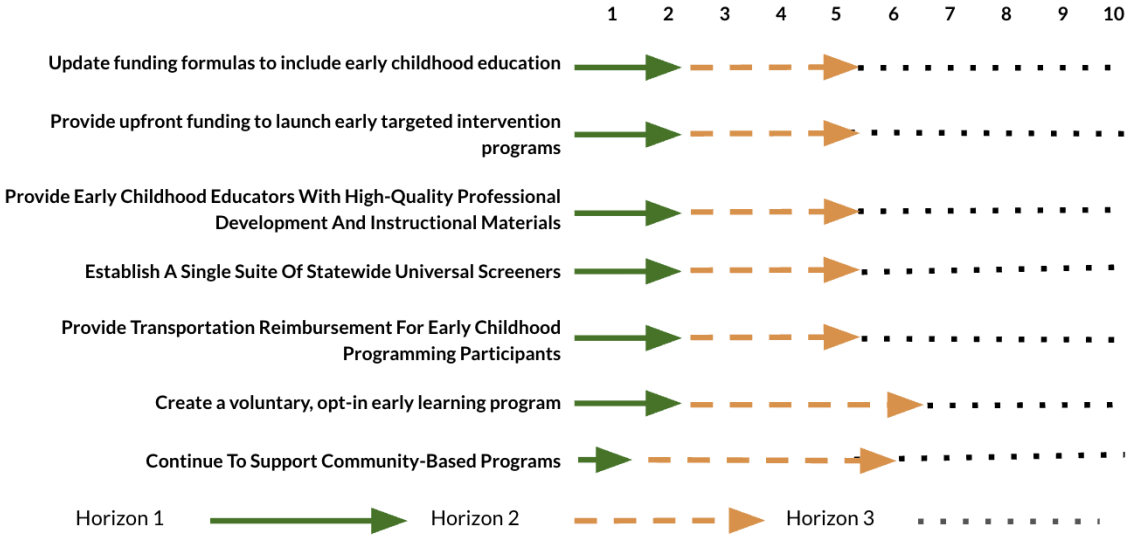
- Pass legislation and/or promulgate policy to solve for local disruptions

Anticipated Impact: Local communities maintain or increase the total number of ECE provider programs serving pre-k aged children

Horizon 3: Monitor program effectiveness (year 5-10)

Anticipated Impact: Local communities maintain or increase the total number of ECE provider programs; the number of blended school/community programs increases as a result of impact analyses

Early Learning: Timeline



Pathways to Graduation

Recommendations

Montana should maintain the current pathways program infrastructure investments while using the benefit of experience and continuous learning to make judicious changes to current policies and to continue to be agile. Additionally Montana can build on current high school practices by pairing middle school career exploration programs with advancements in learner centered program design. This further empowers students and families to make informed college and career choices that allow them to achieve high academic outcomes while preparing for fulfilling and lucrative postsecondary professions. Pathways programs should be flexible to avoid narrowly tailoring/funneling students into careers, be broadly available to support career exploration in in- and out-of-school learning and skill-building experiences, and, as students age, provide opportunities to pursue meaningful credentials. At the same time, well-designed pathways programs should provide students opportunities to pursue advanced academic courses and career oriented pathways opportunities. School districts should use graduate profiles as a focusing point and a call to action for local private, nonprofit, and public sector firms to partner with schools to provide programming, staffing, and other support for pathways programs.

Recommendations

1. Increase the Number of Funded Middle School Pathways Career Exploration Experiences. At present, the Advanced Opportunities grant is predominantly used to cover costs for cost-bearing programs in pathways. Key cost drivers include certification materials and fees for career pathways, which are predominantly available to high school students. The major allowable expenses for middle school students are career exploration clubs, but this restriction on what is allowable precludes other viable advanced opportunities activities for middle school students from being developed. Allowing a broader range of fundable experiences that better represent the diversity of career pathways and the connections between career pathways in high school and the full variety of post-high school career opportunities that correspond to those pathways (inclusive of trades, certification programs, and traditional 2 and 4 year degrees) could yield innovative and effective middle school career pathways experiences, better match middle school students with appropriate career pathways, and improve participation in and outcomes of pathways programs.
2. Increase Overall Funding For Middle School Pathways. Montana currently has over 500 pathways programs inclusive of agriculture, business, marketing, family and consumer sciences, industrial technology, and health sciences. Currently, middle school classes do count toward pathway credits, but don't factor into the ANB funding allocation for CTE classes. Demand for these programs is growing, but the lack of funding available for

districts to develop them is preventing program growth to match demand. One such marker of demand is participation in Career and Technical Student Organizations, which are funded at the high school but not at the middle school.

Implementation Plan

1. Increase the Number of Funded Middle School Pathways Career Exploration Experiences

Horizon 1: Create the conditions and capacity for expanded Middle School career exploration (years 1-2)

- Direct the appropriate agency staff to research effective middle grades career exploration in other states, especially states in which graduate profiles are prominent, and develop a state 'library' of middle grades pathways programs inclusive of, but not limited to, programs that match with Montana's existing CTE offerings. Prioritize programs that match academic experience and career exploration so that students can identify careers that use their preferred skills and match their interests.
- Pass legislation and/or promulgate policy that sets broader parameters on what middle grades career activities can be funded using state support. Use research and stakeholder input to define these parameters, and require OPI to maintain a current library of approved activities while also requiring OPI to seek input on possible activities from districts, vet these activities, and use them to grow the 'library' of activities. Consider requiring OPI to collect data on middle grades programs and maintain a public database of which middle grades activities and programs are being used, and by whom.

Horizon 2: Implement new programs (years 2-5)

- Consider partnering with organizations such as Association for Middle Level Education to provide statewide online resources to educators that set standards for career exploration and provide exemplars.
- Use reporting data on program adoption to inform further research

Anticipated Impacts: Increased middle school career exploration program participation and increased 'uptake' of pathways program in high school. Increased use of off-campus learning opportunities provided by partnerships, and increased focus on and recognition of graduate profiles as a key point of school - family - and community connection through growth of pathways programs.

Horizon 3: Ensure effectiveness (years 5-10)

- Conduct regular (annual or biannual) audits of middle grades pathways programs to ensure students are being provided programs in accordance with policy, and that students are not,

either deliberately or otherwise, participating in pathways programs that stratify them by socioeconomic, racial, disability, or other protected statuses.
Anticipated Impacts: Increases in the number of students pursuing both pathways programs and higher level core academic courses in high school; more data-driven processes for matching students with pathways programs and experiences; increased program completion rates and increased program participation rates.

2. Increase Overall Funding For Middle School Pathways

Horizon 1: Revise current policy to include funding for middle grades pathways programs (years 3-4)

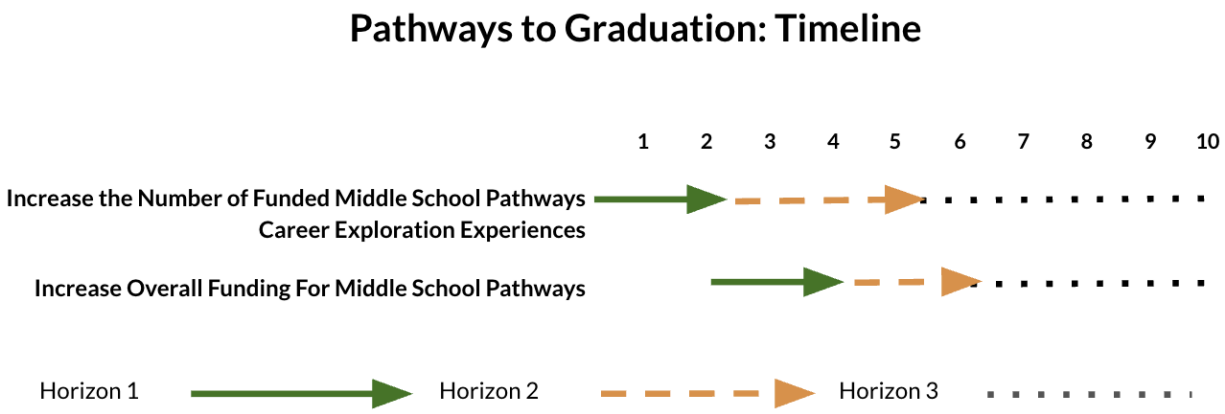
- Audit currently available funding (Perkins, unrestricted local, and other funding sources) available for middle grades pathways programming.
- Analyze of currently available resources (free and funded) that can be used statewide and compare them against Montana and other trusted sources standards for middle grades pathways programs
- Determine what level of funding is necessary for effective middle grades programming to be implemented.
- If necessary, determine a new funding vehicle, whether it is through grants, changes to funding formula, or other means, for additional funding.
- Promulgate legislation and or any and all other policymaking necessary to enact the new policy and establish a launch date for the new funding. Consider delaying this recommendation by one legislative cycle to determine the impact of any new funding on middle grades pathway program adoption.

Horizon 2: Increase funding for middle grades programming (years 4-6)

- Use research on currently available programming and demand for programming to develop a new funding level and a timeline for providing new funding.
- Launch any new funding vehicle and track middle grades expenditures.

Horizon 3: Ensure ongoing effectiveness (years 6-10)

- Incorporate funding analyses into regular audits to determine if middle grades funding is being spent effectively and achieving desired outcomes.



Learner-Centered Design

Recommendations

Current Montana policy permits local districts broad latitude to implement learner-centered district and school policies and practices. However, promoting effective implementation of learner-centered models by providing clearer, more proactive guidance and implementation tools while performing technical assistance and troubleshooting functions that can remove implementation barriers would advance learner centered models. The state has a compelling north star in the top ten competencies from Graduate Profiles, and helping districts implement policies and practices that would further the effective utilization of Graduate Profile-aligned, learner-centered designs would improve both traditional and innovative pathway designs. This, in turn, could improve student outcomes.

Recommendations

1. Resolve And Reconcile Competing Definitions. At present, different definitions for terms such as “competency,” “competency-based,” and “proficiency” exist in different rules and statutes. Also, since the advent of policies for proficiency based learning and other types of learner-centered pedagogies, the context and definitions have changed: the new Graduate Profiles align with the 2023 amended definitions of ‘proficiency' that means “a measure of competence that is demonstrated through application in a performance assessment.” It is not enough to merely identify conflicting terminology through policy analysis: the system needs processes by which local educators can identify the language mismatches that cause districts challenges when implementing student centered learning approaches at the local and state level and propose solutions to state policymakers. The Transformational

Learning Phase II grants provide a natural test-bed for identifying, harmonizing, and proposing language changes.

2. Develop a Roadmap For Learner Centered Design. Districts need a roadmap for progress in moving toward a learner-centered model that provides each with milestones for each phase of implementation: This roadmap should guide efforts, speed near-term implementation, and provide a structure for the collection of promising practices that other districts can emulate and scale in developing their own phased implementation of student centered policies encompassing everything from school board policy to teacher and student handbooks. Again, the Transformational Learning Phase II grants provide a natural test-bed for developing this roadmap.

Implementation Plan

1. Resolve And Reconcile Competing Definitions

Horizon 1: create the conditions and capacity for common language (year 1-2)

- Direct OPI to consult with Transformational Learning phase 2 districts to identify misaligned language in statute and/or policy that creates challenges for districts implementing learner centered policies.
- Bring misaligned language and proposed improved verbiage to BPE and legislative committees, including the Education Interim Committee.
- Pass legislation and/or other policy that allows for expedited rulemaking modeled on the Administrative Conference of the United States to specifically address the harms of misaligned education policy language and its cascading effects for districts, impact on data reporting, and other distortions.

Horizon 2: implement the language alignment strategy (year 3-4)

- Create an online 'disambiguation dictionary' that informs the public how to interpret these inconsistencies in language, along with a description of how language will be harmonized (e.g. via legislation, rulemaking, or OPI/BPE/OCHE Policy) and the timeline for doing so.
- Use partnerships with professional organizations and OPI to ensure that district school boards are ware of necessary policy updates.
- Consider partnering with professional organizations such as Montana School Boards Association to identify and support districts in need of support updating policy language.

Anticipated impacts: Statutory language is aligned, barriers are removed, and a baseline understanding of definitions are established and shared broadly.

Horizon 3: ensure effective implementation of policy (year 4-10)

- Use data and reporting structures, as well as survey instruments, reports from the field, and other stakeholder engagement tools to track policy changes at the local level and to help bring all school district policies into compliance and in alignment with definitions in use statewide.

Anticipated impacts: Statewide language and definitions are aligned and practitioners, along with all stakeholders, all share common understandings of terms such as 'proficiency,' 'competency-based,' and 'learner centered design.'

2. Develop A Roadmap For Learner Centered Design

Horizon 1: Create the conditions and capacity for roadmap development (years 1–2)

- Direct the Office of Public Instruction (OPI) and Transformational Learning Grant Phase II districts to co-write as a "joint report and guidance document," a roadmap that supports subsequent districts in planning, sequencing, and sustaining learner-centered approaches aligned to Graduate Profiles. This document shall serve as the required report to legislative committees due by September 1, 2028, on the progress and recommendations for future programs.
- Design the roadmap as a supportive planning tool, not a mandate, clarifying that districts may move at different paces and pursue different instructional models while working toward shared outcomes.
- Engage a broad set of stakeholders—including educators, school leaders, school boards, families, and students—to ensure the roadmap is accessible, usable, and responsive to community priorities.
- Establish clear expectations that use of the roadmap will serve as a **light-touch prerequisite** for accessing certain state supports, flexibility, or innovation opportunities related to learner-centered implementation.

Anticipated impacts: Montana establishes a shared, practical foundation for learner-centered implementation that reduces uncertainty and risk for districts. Stakeholders understand that the roadmap is intended to guide local planning, not prescribe a single model, creating early confidence and buy-in across schools, communities, and families.

Horizon 2: Implement the roadmap development project (years 2–5)

- Convene an advisory group of district leaders, educators, community members, youth, and implementation partners to guide roadmap development and refinement.
- Develop and publish a modular, phase-based roadmap that identifies common implementation milestones, decision points, and policy considerations—while preserving local flexibility.
- Explicitly connect roadmap phases to related system reforms, including:
    - Educator professional learning and career pathways
    - Strategic staffing models
    - Pathways to Graduation
    - Reporting, accountability, and data system considerations.
- Create an online platform for sharing district-developed tools, planning resources, examples, and lessons learned.
- Identify and elevate early adopter districts as learning partners, sharing examples of effective practice and implementation strategies.
- Use early roadmap uptake to inform targeted technical assistance, professional learning, and policy alignment efforts.

Anticipated impacts: Districts gain a clear, Montana-specific planning resource that helps them sequence learner-centered implementation while avoiding misalignment with policy, staffing, and accountability systems. Early adopters provide concrete examples that build momentum and confidence statewide, increasing voluntary uptake and cross-district learning.

Horizon 3: Develop supports for implementation and track progress (years 5–10)

- Use data from Transformational Learning Grants, accreditation reviews, and other improvement processes to assess statewide progress against the roadmap and identify patterns of success and challenge.
- Evaluate how learner-centered implementation is enabling Graduate Profile competencies, instructional quality, educator collaboration, and student engagement.
- Use roadmap findings to inform state-level adjustments to policy, reporting, and accountability systems—reducing unnecessary burden and better aligning requirements with learner-centered practice.
- Regularly update the roadmap to reflect lessons learned, emerging best practices, and evolving system conditions.
- Maintain the roadmap as a standing reference between Decennial Commissions, ensuring continuity and preventing reform fragmentation over time.

Anticipated impacts: Montana sustains a living, evidence-based roadmap that supports continuous improvement in learner-centered implementation. Districts experience greater coherence between instructional practice and state systems, families see clearer

connections between learning experiences and desired outcomes, and policymakers gain actionable insight into what enables successful, scalable learner-centered education across diverse contexts.

Learner Centered Design: