A VISION FOR K-12 PUBLIC EDUCATION IN MONTANA

K-12 VISION GROUP STRATEGIC PLAN

Updated September 2020

WHO IS THE K-12 VISION GROUP?

The K-12 Vision Group was first formed by key education advocacy groups (including MASBO, MFPE, MQEC, MREA, MTSBA and SAM) in the Fall of 2011 with a charge of developing a comprehensive vision for the future success of public education in Montana and establishing a clear road map to achieve that vision.

Comprised of a succession of teachers, elected trustees, superintendents, principals and school business officials nominated by their peers from across the state of Montana, the K-12 Vision Group has developed an inspiring vision, aligned with the guarantees afforded Montana citizens under our Constitution that holds great promise for the future of Montana. The K-12 Vision Group's meeting this year marks a full decade of consistent devotion to a vision-based approach to advocacy, with each child in every public school identified as the primary stakeholder and beneficiary of our efforts.

The members contributing to the work of the K-12 Vision Group over the last decade have come from a wide variety of school districts, large and small, east and west, urban and rural, and including districts from the State's seven reservations. The trustees who have served come from all walks of life, including farmers and ranchers, successful business people, retirees and early career professionals. Each member has come to share a focus on ensuring effective advocacy for each child in every public school.

The work of the K-12 Vision Group continues to provide a clear, contemporarily-relevant path to a successful future and remains critical to fulfilling the vision of our Montana Constitutional Framers for a basic system of free quality public schools that fully develops the educational potential of each person in Montana.

Core Purpose

A system of public education which will develop the full educational potential of each person. Article X, Section 1, Montana Constitution, 1972.

Core Values

Montana's public school districts share the authority and responsibility with the Legislature, Governor, Board of Public Education and Superintendent of Public Instruction to provide a system of public education that affords children, their families and Montana's citizens each of the guarantees of Article X of the Montana Constitution. We collectively bear the responsibility for ensuring important constitutional guarantees afforded children under Article X of the Montana Constitution:

The Montana Constitution guarantees:

Article X, Section 1:

- The preservation of a basic system of free quality public elementary and secondary schools throughout Montana that is capable of developing the full educational potential of each person served;
- 2. Quality and equality of educational opportunity for each person;
- 3. The preservation of the distinct and unique cultural heritage of American Indians;

Article X, Section 7:

Prohibits discrimination on account of sex, race, creed, religion, political beliefs, or national origin in Montana's public schools;

Article X, Section 8: Each community's ownership of its publicly funded schools, with the support and engagement of school staff and the community exercised through supervision and control by elected trustees;

Article X, Section 9: General supervision of Montana's public schools by an appointed Board of Public Education

Article X, Section 2, 3, 4 and 5: The proper and exclusive use of state land revenues for Montana's public schools.

WHERE ARE WE GOING? OUR ENVISIONED FUTURE - 2030

Montana's K-12 public schools work collaboratively with each other, with state policymakers, and with their communities, through a system that is flexible, adequately and rationally funded, and community-owned, to successfully develop the full potential of each person,

Vivid Descriptions of our Envisioned Future:

Policy makers at all levels:

- Consistently recognize, honor and support the goal of the people to establish a system
 of education which will develop the full educational potential of each person and use that
 goal to drive policy making decisions;
- Consistently support each community's ownership of its public schools and each district's ability to develop the full potential of each child through supervision and control by locally elected school boards;
- Adequately and rationally provide the resources needed by Montana's public schools;
 and
- Support the budgetary and other flexibilities needed by Montana's public schools to be responsive to community and student needs.

Montana's public school districts are student-centered, focused, adaptable, innovative, engaging, safe and secure, and driven to:

- Ensure that public school students' knowledge and skills match contemporary needs including college, workforce and career readiness;
- Use innovation and technology to link each student to the world in which they will learn and succeed:
- Operate in well-designed, modern and updated facilities that further learning;
- Engage families, the community, and each other to develop the full potential of each child:
- Empower and engage students to actively participate in their education and set high expectations for themselves;
- Design and use effective data systems to support and improve each student's success;
 and
- Increase academic excellence through equitable availability of the full spectrum of educational resources and opportunities.

As a result of the support of policy makers and the leadership of Montana's public school districts, Montana's public school students:

- Appreciate the value of their education and are inspired to ensure the success of public education as stewards of the future:
- Succeed despite the circumstances of life that could otherwise interfere in achievement of their full potential; and
- Use the knowledge and skills they develop in Montana's public schools to think critically, engage and succeed as productive members of society.

OUR FIVE YEAR GOALS

UPDATED September 2020

We have set our goals based on an understanding of our capacity for instituting change. These are areas focused on the intersection of our passion, our abilities and what children need to reach their full potential in Montana's public schools.

We establish these intended outcomes at the half-way point between today and our 2030 Envisioned Future in order to ensure that we will have made the progress needed by 2025 to get approximately 50% of the way toward achievement of our ultimate goal. If our Envisioned Future is Mount Everest, then our five year goals represent the base camp objective we hope to reach by 2025 to put ourselves on a path of success.

Student Success: Statement of Intended Success, 2025

Continued growth in student success in Montana's public schools is evident through multiple measures, including but not limited to:

- 100% of Montana's students exit the public education system career and college ready, having experienced a rigorous curriculum and explored career pathways relevant to the interests of each child and greatest likelihood of personal and professional success;
- Contributing member of society and well-prepared for the office of citizen;
- A continued increase in students graduating with postsecondary credits and/or trade certifications through expanded high quality opportunities for dual enrollment and earlier career pathway knowledge;
- Continued improvement and greater focus in narrowing achievement gaps through targeted intervention and other strategies with an emphasis on early childhood education for at-risk children:
- Use all available options and measures to assess and evaluate individual student learning and growth;
- Fostering growth mindsets, passion for learning, and interpersonal and soft skills
 including perseverance and social and emotional intelligence and preparedness to be
 part of a dynamic workforce that is unpredictable and evolving; and
- Access to and use of the elements of a well-rounded education in the contemporary sense of the word, with regular consideration of what is needed for success in the world of today and tomorrow, including:
 - Early childhood education
 - Full time kindergarten
 - Gifted and talented education
 - Music and art
 - Physical Education
 - Technology
 - Career and technical education/certifications
 - Advanced placement and Dual Credit Courses

As a result of these achievements, students in Montana's Public Schools complete their K-12 education ready for a lifetime of post-secondary success as productive and engaged citizens, pursuing the full spectrum of college and career options.

Teaching and Learning: Statement of Intended Success, 2025

Supported by the widely held trust in educators and strong local control, Montana's public school educators and students thrive. Montana's public schools have the resources they need to focus on students and maximize student success while empowering teachers and administrators to continually avail themselves of the latest research, innovative uses of technology, multiple pathways of teaching delivery, and other evolving teaching and learning strategies to better provide personalized instruction for each child. Montana public schools prioritize systems of support for educators' personal wellbeing and mental health to ensure they experience professional fulfillment and are able to best support student success. Using these resources, educators facilitate the development of the full educational potential of each child. Montana's higher education system fully prepares exceptional teachers to meet the needs of schools and students while Montana public school districts attract and retain quality educators.

Sufficient numbers of teachers exist to fill rolls in districts throughout Montana and systems exist to support and encourage students to take a career path in education. Additional opportunities exist for people in the trades to share their knowledge and skills with students in the classroom while encouraging those people to become certified teachers if they so desire.

Governance, Leadership and Accountability: Statement of Intended Success, 2025 Locally elected school boards, administrative leaders, teachers, staff, local communities and student leaders collaboratively focus on the interests of each (whole) child educated in our public schools. This collaboration and focus is also reflected in the relationships among the statewide public education advocacy groups representing teachers, trustees, administrators, and school business officials. The Legislature, Governor, Board of Public Education, and Superintendent of Public Instruction all actively support and collaborate to continually improve and honor the guarantees of the Montana Constitution. As a result, this chain of advocacy causes Montana schools to be nationally recognized for excellence.

Governance and leadership systems support nimble, contemporary and innovative educational platforms that meet the diverse learning needs of all students that empower them to take ownership for their own educational goals and center the development of student social, emotional and behavioral learning.

Culture, Climate and Social Values: Statement of Intended Success, 2025 Montanans recognize their public schools as the key to the state's future successes. As such, the independent spirit, unique values, respect for all, and strong work ethic of Montanans are well recognized and reflected in each of Montana's public schools. Through our collective dedication to maximizing our resources for excellence, our commitments to quality public

education in each community, recognizing the diversity of our state, including the preservation of our American Indian culture, and transformational learning environments, all students, regardless of personal circumstance or ability, feel empowered and fully prepared for a successful future. By recognizing the individual needs of each child within the context of each community, each student in Montana's public schools feels safe, supported, respected and loved. Students will be equipped with a high degree of social and emotional intelligence and personal mental wellness. This includes student centered learning that develops independent and critical thinkers who know how to evaluate information and make educated decisions about that information.

Community Engagement: Statement of Intended Success, 2025

Montana's communities understand the generational gift public education provides and the importance of taking pride and ownership in their local public schools, setting high standards, being an integral part of the solution and sharing in the successes of our students and local public schools. Both the community and schools place emphasis on a shared narrative, ongoing collaboration, resource sharing and communication. Publicly celebrating the work of Montana's public schools and telling the stories of students, teachers, staff and administrators has resulted in community engagement and support to ensure the success and safety of each child. Montana's public schools and communities have collaborated to energize and effectively individualize public education to increase social, emotional and academic success for each child in Montana. Meaningful community engagement provides opportunities for mutual understanding of the needs of the community and the school, while working jointly towards a robust participatory and informed relationship.

LEGISLATIVE PRIORITIES FOR THE 2021 LEGISLATIVE SESSION

UPDATED September 2020

The K-12 Vision Group validates and supports the intersecting legislative priorities of the advocacy organizations partnering in the Montana Public Education Center addressing the following critical issues:

- Support initiatives and proposals that advance the interests of public schools and students as described in our vision and goals;
- Provide adequate and equitable resources and support to meet the needs of special education students:
- Enhance and ensure continued progress of closing the gap to fully fund public education through the established funding formula and support to schools, including but not limited to, inflation application to K-12 base aid and infrastructure support;
- Advocate that all pre-k models proposed ensure the implementation of formula-based early childhood education;
- Expand opportunities to meet the needs of at-risk students;
- Support recruitment and retention of excellent educators and staff;
- Ensure the health and safety of students in every Montana school;
- Properly support high quality school conditions and infrastructure;
- Fulfill the constitutional promise of a quality education to ensure opportunity for every child in Montana; and
- Oppose any proposal that diverts limited state general fund revenues to private education while failing to provide the funding support of public education needed to preserve the constitutional rights of each child to access a basic system of free quality schools that fulfills the educational potential of each person.

MEGATREND ANALYSIS - PLANNING HORIZON 5-10 YEAR

Demographic Challenges

1. We anticipate the trend of a disproportionate aging of Montana's population (compared to national trends) will continue.

Implications for Montana's Public Schools: A reduction of administration, trustees, staff to replace retiring/departing leaders; a generational shift on the level of commitment of staff, students and community leaders; impact on the passage of levies and bond as a result of an increase in families without children in our public schools; the need to support members when constituents are looking at schools differently and from disconnected points of view.

We anticipate the trend of population expansion of urban areas to continue with a
corresponding trend of depopulation in rural areas. Montana has a total of 56 counties.
Forty-six of these counties have 6 or fewer people per square mile, so they are
designated as "frontier counties."

Implications for Montana's Public Schools: A need to maximize existing facilities and a need for new construction in those urban areas experiencing ongoing and significant population growth. In rural areas facing decreases in population and student counts, a need for repurposing/redesigning facilities to preserve the value of existing facilities and to right-size for the declining populations served. This trend implicates a need for increased quality and quantity of distance learning options to ensure equality of educational opportunity for each child throughout Montana. This trend also implicates the challenge in continuing to find common ground and engaging the membership with a united voice.

3. We anticipate an increase in both the identification of and required services for students with special needs, including those students with social and emotional challenges.

Implications for Montana's Public Schools: Montana's Public Schools will need to recruit and retain quality staff to meet the needs of these students. Given Montana's Public Schools' new authority to levy amounts on a nonvoted basis to pay for the needs of students with disabilities in combination with the lack of political will to adequately support special education from state and federal sources (which currently funds only 15% of such costs), there will likely be an increased cost of serving students with disabilities to property taxpayers. Montana's Public Schools will need to adapt and update school facilities to meet the ongoing needs of students with special needs. Effective communications with parents and communities is vital to ensure understanding and support for the necessary resources to serve each child well.

- 4. We anticipate the trend of increasing numbers of families in need with school-age children, including families of teaching staff, that negatively impact our youth will continue.
 - **Implications for Montana's Public Schools:** Montana's Public Schools will need to identify and ensure adequate services for at-risk students to ensure equality of educational opportunity for each child throughout Montana.
- 5. We anticipate a continued trend of increased illegal prescription drug, illegal drugs, alcohol, vaping and nicotine abuse with school-age children and their parents among other risk factors that negatively impact our youth.
 - **Implications for Montana's Public Schools:** Montana's Public Schools will need to provide education to the staff and parents of the new methods used, the dangers of use and identify available resources.
- 6. We understand the possibility of a permanent loss of students to homeschooling or remote learning options following COVID-19 and related responses.
 - Implications for Montana's Public Schools: Montana's public schools will need a developed strategy to address any loss in ANB, loss of students to privatization of schools and public funds, and other related funding losses as a result of Espinoza. This will require united and direct advocacy in order to confirm continued funding of public schools. Poverty implications and child care issues due to COVID-19 will continue to be prevalent; this will likely exacerbate the current lack of substitute bus drivers and teachers and the loss of qualified personnel in schools.

Business / Economic Climate Challenges

- We anticipate continued business growth in our urban areas and continued economic challenges for rural areas, particularly those areas where agriculture is the primary economic force.
 - The COVID pandemic has impacted the economy as a whole both urban and rural stagnation or decline could be possible but the economic climate is unknown in the short term. Educational resources, funding in particular, may be impacted at the federal level.
 - Implications for Montana's Public Schools: Some of Montana's Public Schools will experience an increase in tax base with an increase in business and economic development while others will experience no increase and/or decreases in tax base due to a diminution of businesses and economic growth. This will result in enhanced local support for some and significant challenges for those experiencing a shrinking tax base. As new residents from out-of-state purchase property in growing and urban areas, residential tax bases may be growing and property values increasing.

- 2. We anticipate continued volatility of our natural resource-based economy that will continue to create budget difficulties at the state level. We anticipate the cost of living and housing will increase the financial burdens of teachers. Employment has been limited, resulting in anticipated loss of enrollment. Though some communities more impacted by extreme boom/bust cycles have experienced a loss of good paying jobs but families remaining in the community and taking lower paying jobs, resulting in enrollment remaining steady.
 - **Implications for Montana's Public Schools:** Continued volatility in natural resource-based funding will continue to create uncertainty and instability in funding for Montana's public schools with particular emphasis on schools located in impact zones.
- We anticipate ever-changing and increased competition in the global economy with an increased reliance on skilled labor. In turn, we anticipate an increase in the number of students interested in seeking skilled labor positions.
 - **Implications for Montana's Public Schools:** Montana's Public Schools will need to ensure that we are educating students with the knowledge and skills necessary to succeed in an ever-changing world.
- 4. A continual increase in the number of students who speak English as a second language will become significant.
 - **Implications for Montana's Public Schools:** Our schools will need the resources to provide these services in compliance with legal requirements.
- 5. A continual reliance on grandparents, other relatives and non-related adults assuming educational authority for students.
 - **Implications for Montana's Public Schools:** Our schools will need to coordinate with legal guardians, caretaker relatives and others who have power of attorney to make educational decisions for children. This will result in a need for enhanced resources for student-support services.

Legislation / Regulation Challenges

- 1. We anticipate continued uncertainty in the funding of public schools due to the current political climate and changing economic circumstances.
 - a. Espinoza (U.S. Supreme Court) fallout and potential negative effect on constitutional prohibitions on indirect aid to private education. We are facing a likely future where the prohibition on indirect aid to parochial education in Montana is eliminated by the U.S. Supreme Court.
 - The shift toward/increased reliance on local level funding because of the lack of federal (e.g., Impact Aid and IDEA) and state resources

- c. Increased resistance at the bureaucratic and other levels of the federal and state departments of education to community ownership and local control of public schools. These departments are being regulatory in nature and inconsistent resulting in a lack of support for the public school system.
- d. The current conditions are requiring schools to develop delivery methods (blended models and others) that will need on-going funding and flexibility in order to provide the best education for the whole child. This would include, but not limited to technology resources (hardware, software, etc.), professional development, availability to internet/broadband capabilities, expansion of staff to meet the contemporary educational needs including wages, benefits, etc.

Implications for Montana's Public Schools: Montana's Public Schools will need to maximize the resources and the flexibilities that are available to them. They will need to make concerted ongoing efforts to engage the communities in planning for and supporting the future needs of students and the communities served. They will further need to protect the legislative gains we have made and hold firm in order to prevent the diminution of the funding formula. Funding flexibility will need to remain intact and expanded.

2. We anticipate continued increases in employee healthcare costs.

Implications for Montana's Public Schools: Continued increases in healthcare costs will stress all other areas of school finance. It will also impact Montana's Public Schools ability to recruit and retain quality staff if we are unable to offer competitive benefits. Schools need to be included, not excluded, in the permissive levies allowed by county departments to offset the expanding costs of healthcare costs.

3. We anticipate an increased desire by students to access advanced opportunities.

Implications for Montana's Public Schools: We will need to ensure access to these opportunities by all students and not just those students who have easy access because of geographic proximity to higher education institutions.

4. Recruitment and retention of educators and administrators will continue to impact schools exacerbating the teacher and administrator shortage.

Implications for Montana's Public Schools: A teacher and administrator shortage across the state will continue to impact schools and could result in a crisis beyond what any local district can address on their own accord.

Technology / Science Challenges

1. The increased reliance on technology and sciences, moving at a rapid pace, will substantially exceed the speed at which regulations can be adjusted or removed to accommodate available innovations.

Implications for Montana's Public Schools: Montana's Public Schools will continue to have challenges keeping up with the cost of science and technological advancements (applications, licensing, hardware), technology plans, staff well-versed in science, technologies and innovations that advance student success, and ensuring equitable access to technologies and sciences that support student learning and opportunities. We also have an opportunity, however, to advance the proposition that reducing federal and state regulations and vesting increased authority in local communities could make our schools more "innovation-ready." College/university education preparation programs will need to address the need to prepare teachers on various platforms. Local school districts will need to provide quality professional development on the programs and platforms used in the district. Providing reliable internet is crucial to ensure equity among students, both in the school buildings and in the community. Schools should be using technology to enhance cross-curricular content, this could change the make-up of a classroom that is not necessarily age-based.

 We acknowledge ongoing security issues, taking appropriate steps to eliminate security breaches and appropriate use of technologies by staff and students will present ongoing issues for Montana's Public Schools.

Implications for Montana's Public Schools: Montana's Public Schools need to be hypervigilant in taking measures to ensure databases and other electronically-stored information are secured with industry-leading technology. Montana's Public Schools need to provide ongoing professional development of staff and instruction to students on acceptable use policies.

 We anticipate a continued trend of future jobs and careers based in technology and science. As well, we anticipate a continued trend of traditional "in-person" jobs and careers may be replaced by remote work jobs.

Implications for Montana's Public Schools: Montana's Public Schools will need to adapt to advancements in technology and science in order to prepare students for the jobs/careers of tomorrow. We will need to continue our advocacy and support for student advancements and flexibilities that support personalized learning to prepare students for future jobs/careers in these areas.

4. We anticipate a continued trend of cyber-bullying and other social media conflicts from the ever-evolving platforms which negatively impacts the learning environments of Montana Public Schools.

Implications for Montana's Public Schools: Montana's Public Schools need to be hyper vigilant, in both proactive and responsive manners, to the social media issues and threats that have potential to negatively impact our students. Montana's Public Schools need to continue to develop and implement acceptable social media policies and usages in all Contexts.

5. Due to the Covid-19 Pandemic, we anticipate a model of in-person, remote, and blended will need to be considered, with technology being the driving force to give more tools to teachers to individualize learning.

Politics / Social Values Challenges

1. We anticipate the ongoing trend of public engagement in the work of public schools to continue. We also anticipate increased criticism of public school delivery methods.

Implications for Montana's Public Schools: There is growing support for alternative delivery methods and privatization of education. If this trend continues, there will be a loss of state and/or federal public funding that will be redirected to private education. This will impact the quality of education students receive and the financial burden on local taxpayers. School districts must deliver high quality instruction and effectively increase public awareness of the outstanding things that are happening in their public schools. COVID-19 has resulted in increased polarizations related to changing traditions and instructional methods, the pandemic can instead be addressed by also using it as an opportunity to progress and address long-standing student needs.

We anticipate a continuing trend of a political and philosophical shift toward the rejection and distrust of government at all levels. We anticipate a greater need for transparency to counter distrust.

Implications for Montana's Public Schools: Montana's Public Schools will need to restore and maintain high levels of trust by visibly engaging communities in working together to fully develop the educational potential of each child. We will need to continue to promote the great things that are happening in our public schools, highlighting innovations and other changes that support the needs of and increase the success of children in our public schools. A heightened sense of angst due to COVID-19 has resulted in distrust and uncertainty towards institutions. This could impact school funding during a volatile legislative session and as well as a continual shifting of public expectations regarding the multitude of roles played by schools.

3. We anticipate a continued societal expectation and emphasis on post-secondary education. However, we also anticipate an increase in tuition costs and continued limited access to local communities for post-secondary options.

Implications for Montana's Public Schools: Montana's Public Schools will need to increase available options for students to be prepared for all possible post-high school options, including but not limited to, dual credit, CTE opportunities, immediate careers, 2-year college, 4-year college or armed services. We have great opportunities to use K-12 resources to increase the affordability of entering the workforce, access to apprenticeship programs, and post-secondary education, through expanded access to advanced placement and dual credit courses that can be used to satisfy or waive postsecondary credit that would otherwise require the payment of tuition. The need to address how schools prepare students for jobs now proven to be essential through the COVID-19 pandemic is apparent. Though many of these jobs do not require post secondary education, there is a need to understand their potential for innovation and growth. Remote opportunities may now be able to be explored more readily and offer opportunities for partnership for our CTE students. With greater access to college bound opportunities, dual credit programing will require certification and schools and state bodies may need to find other opportunities for stipends or incentives for teachers to obtain certification.

4. We anticipate that the trend of enhanced student activism on issues relating to safety and social justice will continue.

Implications for Montana's Public Schools: Montana's Public Schools will need to continue balancing students' rights while maintaining safe school environments, minimizing the disruption to school operations and violations of district policy and protocol. Modeling critical thinking and respectful behavior will assist in teaching students how to "disagree with grace." Supporting and implementing curricula that supports conflict resolution and facilitation of these respectful conversations and opportunities for growth.

Appendix "A"

Taking Stock of our Successes

The importance of the K-12 Vision Group and the collaborative work of Montana's K-12 public educational organizations, trustees, administrators, business managers and teachers alike cannot be overstated. We have made significant progress over the course of a decade as a result of the hard work, dedication, vision and strategic planning of the K-12 Vision Group. The following summarizes the successes we havehad since the K-12 Vision Group's work began in 2011 in preparation for the 2013 Legislative Session:

- 1) 2013 Legislative Session:
 - a) SB 175 was the first school funding bill in modern history that provided the largest one-session funding increase for K-12 public schools in history (\$105 million biennial). In addition to a prorated basic entitlement that provided school districts of all sizes with millions in new funding, SB 175 also increased the basic and per-ANB entitlements, attained inflationary increases on portions of the formula that had been frozen since 2005, provided a new funding stream for student data systems, added a new natural resource development payment to freeze local property taxes and provide a funding stream for school construction, and implemented:
 - i) Proficiency based ANB, with no seat time requirement. This can help facilitate accelerated learning for gifted and talented students and could also be used to free up resources to pay for dual credit courses for such students and to devote more time to individualized instruction.
 - ii) School board flexibility to increase its over BASE general fund levy without a vote, provided that other non-voted levies are reduced by a corresponding amount.
 - iii) Immediate increased funding for school districts experiencing an unusual increase in enrollment with more meaningful thresholds than what existed under previous law. Old law required a 6% increase before immediate funding could be attained. We successfully changed this so that an increase of 4% or 40 students would qualify a school district for immediate funding.
 - b) SB 191: Allows a district to use the non-voted tuition fund to pay for any actual costs of providing a Free Appropriate Public Education

- to students qualifying for services under IDEA that are above the current federal, state and local funding streams available to serve such students.
- c) SB 348: Allows a district to transfer state or local revenue from any fund other than debt service or retirement to its building reserve fund and use the funds for enhancements to school safety and security.
- d) We successfully defeated privatization proposals introduced in the 2013 Legislative Session.

2) 2015 Legislative Session:

- a) Inflation was funded as the first bill of the session.
- b) We successfully lobbied for funding the phased in money from SB 175 in the 2013 Session, as SB 175 included a three year phase in of its funding.
- c) We successfully defeated the first attack on exceptional circumstances enrollments, which Senator Regier attempted to amend out of the law through a floor amendment to Representative Pope's IDEA bill.
- d) We successfully lobbied for OTO increase in CTE funding.
- e) We successfully extended the temporary safety provisions in SB 348 (2013 Session) for another two years under SB 213.
- f) HB 162 Secured autonomous, cost-based fee authority of the Digital Academy to ensure its continued success and to avoid enrollment caps.
- g) SB 410 We were able to incorporate language requiring the Dept. of Revenue to administer the rule in compliance with Article X, Section 6 of the Montana Constitution. NOTE: Although we ultimately lost this battle at the U.S. Supreme Court in the case of *Espinoza v. Montana Dept. of Revenue* (2020), we prevailed on our argument that the bill was unconstitutional, in violation of Article X, Section 6 before the Montana Supreme Court. Our argument regarding the prohibition under the Montana Constitution was not discounted by the U.S. Supreme Court; rather, the Court ruled that Article X, Section 6 the Montana Constitution as written violates the free exercise clause of the U.S. Constitution.

3) 2017 Legislative Session:

a) Senate Bill 103: Extended new flexibility for personalized learning at the system level. Removed the obligation to provide the

- aggregate hours of instruction to all students other than those not gaining proficiency.
- b) Senate Bill 307: Created a new major maintenance funding stream of \$23 million annually, through a combination of non-voted levy authority and matching funds through the Natural Resource Development Payment, thereby covering \$10.5 million of the \$23 million through state funds. This bill also made the temporary provisions on safety transfers from SB 348 and SB 213 a permanent part of law.
- c) House Bill 647: Protected school districts against what would have otherwise been budget reductions of \$42 million. Used block grant funds to cover short term budget shortfalls and expanded GTB FY18- 21, providing \$20 million in net increased GTB compared to old GTB and block grants.
- d) Inflation was funded as the first bill of the session.

4) 2019 Legislative Session:

- a) House Bill 211: Passed funding for educator loan repayments for schools facing critical quality educator shortages.
- b) House Bill 247: Authorized school districts to use major maintenance resources to service debt on major maintenance loans. Authorized over \$250 million in major maintenance loans.
- c) House Bill 351: Provided incentive funds to help school districts convert to personalized learning models.
- d) House Bill 387: Increased career and technical education programming and funding, expanding to middle grades, authorizing matching non-voted adult education levy funds and more than doubling current CTE funding levels.
- e) House Bill 576: Increased flexibility over donated funds previously obligated to endowment funds. Expanded school district access to over \$30 million in such funds.
- f) Senate Bill 92: Expanded authorized use of funding transfers, major maintenance resources and voted levies for operational and capital costs of school and student safety and security.

APPENDIX B

K-12 Vision Group 5 year Goal Area Legislative Proposals Already in MT-PEC Partner Platforms

K-12 Vision Group Proposed Priority(ies)

Student Success:

Statement of Intended Success, 2025 Continued growth in student success in Montana's public schools is evident through multiple measures, including but not limited to:

- 100% of Montana's students exit the public education system career and college ready, having experienced a rigorous curriculum and explored career pathways relevant to the interests of each child and greatest likelihood of personal and professional success;
- Contributing member of society and wellprepared for the office of citizen;
- A continued increase in students graduating with postsecondary credits and/or trade certifications through expanded high quality opportunities for dual enrollment and earlier career pathway knowledge;

MASBO

- Support full funding of present law.
- Support additional funding for special education cooperatives and an inflationary increase of the special education allowable cost appropriation consistent with the other state payments to a school district's general fund.
- Support recruitment and retention of quality educators.
- Support facility and technology infrastructure.
- Oppose public funding for privatization.

MFPE

- Expand state funded public education opportunities to pre-k and Head Start children.
- Adopt an annualized inflationary increase in state funding of special education.
- Fund the Quality Educator Loan Assistance Program.
- Maintain funding of annual stipends for

- Support initiatives and proposals that advance the interests of public schools and students as described in our vision and goals;
- Provide adequate and equitable resources and support to meet the needs of special education students;
- Enhance and ensure continued progress of closing the gap to fully fund public education through the established funding formula and support to schools, including but not limited to, inflation application to K-12 base aid and infrastructure support;
- Advocate that all pre-k models proposed ensure the implementation of formula-based early childhood education;
- Expand opportunities to meet the needs of at-risk students;
- Support recruitment and retention of excellent educators and staff;
- Ensure the health and

- Continued improvement and greater focus in narrowing achievement gaps through targeted intervention and other strategies with an emphasis on early childhood education for at-risk children;
- 100% use of flexible mediums to assess and evaluate student learning and growth;
- Fostering growth mindsets, passion for learning, and interpersonal and soft skills including perseverance and social and emotional intelligence and preparedness to be part of a dynamic workforce that is unpredictable and evolving; and
- Access to and use of the elements of a well-rounded education in the contemporary sense of the word, with regular consideration of what is needed for success in the world of today and tomorrow, including:
 - Early childhood education

- National Board-Certified teachers.
- Maintain full state funding of the Montana Digital Academy.
- Mandate compulsory enrollment from age 6 to age 18 or completion of a high school diploma or equivalent.
- Extend ANB for students up to 20 years of age.
- Authorize school districts to utilize a voted or permissive levy to fund school safety issues including employment of Student Resource Officers.
- Expand dual enrollment opportunities across
 Montana.

MFPE Opposes

- Invest public revenues in private and sectarian schools, including charter and home schools.
- Dictate school accreditation and teacher licensure standards, curricula, and methods of instruction.
- Authorize school districts to employ without restriction nonlicensed persons as professional educators.
- Repeal Montana teacher tenure.

- safety of students in every Montana school;
- Properly support high quality school conditions and infrastructure;
- Fulfill the constitutional promise of a quality education to ensure opportunity for every child in Montana; and
- Oppose any proposal that diverts limited state general fund revenues to private education while failing to provide the funding support of public education needed to preserve the constitutional rights of each child to access a basic system of free quality schools that fulfills the educational potential of each person.

- Full time kindergarten
- Gifted and talented education
- Music and art
- Physical Education
- Technology
- Career and technical education/certi fications
- Advanced
 placement
 and Dual
 Credit
 Courses

As a result of these achievements, students in Montana's Public Schools complete their K-12 education ready for a lifetime of post-secondary success as productive and engaged citizens, pursuing the full spectrum of college and career options.

 Circumvent local school board authority to determine which school employees may carry guns in public schools.

MQEC

- Defend and preserve the existing funding formula defined in 20-9-309 MCA, including the final year of the final year of Guaranteed Tax Base (GTB) expansion and funding for the school facilities program.
- Support efforts to address teacher recruitment and retention issues.
- Ensure application of inflation to all elements in the funding formula, particularly special education.
- Successfully defeat efforts to fund charter schools, tax credits, vouchers, and education savings accounts, with public funds at the expense of funds that would otherwise be committed to our public schools.
- Successfully defeat assaults against the Board of Public Education's accreditation standards and local district policy.
- Pursue solutions to provide digital equity for

all students, particularly functional Internet access and suitable devices to facilitate remote or online learning.

 Obtain sufficient funding for schools to implement required safety procedures to address the COVID-19 pandemic.

MREA

- Ensure full funding of present law.
- Maintain fiscal support for teacher recruitment for rural schools.
- Support additional for special education cooperatives AND statutory inflationary increases for special education funding coming from the state.
- Maintain and enhance local control.

MTSBA

- Preserve previous progress
- School facilities
- Equitable funding
- Recruitment and retention
- Resolve selective application of inflation to the funding formula and improve the accuracy of the inflation factor
- Improve access to opportunity for students facing barriers to effective learning

SAM

- Support Adequate and Equitable School Funding
- Support Recruitment and Retention of Quality Educators
- Oppose Privatization with Public Funds
- Support Facility and Technology Infrastructure
- Support School Based Mental Health Services

Teaching and Learning:

Statement of Intended Success, 2025 Supported by the widely held trust in educators and strong local control, Montana's public school educators and students thrive. Montana's public schools have the resources they need to focus on students and maximize student success while empowering teachers and administrators to continually avail themselves of the latest research, innovative uses of technology, multiple pathways of teaching delivery, and other evolving teaching and learning strategies to better provide personalized instruction for each child. Montana public schools prioritize systems of support for educators' personal wellbeing and mental health to ensure they

MASBO

- Support full funding of present law.
- Support additional funding for special education cooperatives and an inflationary increase of the special education allowable cost appropriation consistent with the other state payments to a school district's general fund.
- Support recruitment and retention of quality educators.
- Support facility and technology infrastructure.
- Oppose public funding for privatization.

MFPE

 Expand state funded public education opportunities to pre-k and Head Start children.

- Support initiatives and proposals that advance the interests of public schools and students as described in our vision and goals;
- Provide adequate and equitable resources and support to meet the needs of special education students;
- Enhance and ensure continued progress of closing the gap to fully fund public education through the established funding formula and support to schools, including but not limited to, inflation application to K-12 base aid and infrastructure support;
- Advocate that all prek models proposed

experience professional fulfillment and are able to best support student success. Using these resources, educators facilitate the development of the full educational potential of each child. Montana's higher education system fully prepares exceptional teachers to meet the needs of schools and students while Montana public school districts attract and retain quality educators. Sufficient numbers of teachers exist to fill rolls in districts throughout Montana and systems exist to support and encourage students to take a career path in education. Additional opportunities exist for people in the trades to share their knowledge and skills with students in the classroom while encouraging those people to become certified teachers if they so desire.

- Adopt an annualized inflationary increase in state funding of special education.
- Fund the Quality Educator Loan Assistance Program.
- Maintain funding of annual stipends for National Board-Certified teachers.
- Maintain full state funding of the Montana Digital Academy.
- Mandate compulsory enrollment from age 6 to age 18 or completion of a high school diploma or equivalent.
- Extend ANB for students up to 20 years of age.
- Authorize school districts to utilize a voted or permissive levy to fund school safety issues including employment of Student Resource Officers.
- Expand dual enrollment opportunities across
 Montana.

MFPE Opposes

- Invest public revenues in private and sectarian schools, including charter and home schools.
- Dictate school accreditation and teacher licensure standards, curricula,

- ensure the implementation of formula-based early childhood education;
- Expand opportunities to meet the needs of at-risk students;
- Support recruitment and retention of excellent educators and staff;
- Ensure the health and safety of students in every Montana school;
- Properly support high quality school conditions and infrastructure;
- Fulfill the constitutional promise of a quality education to ensure opportunity for every child in Montana; and
- Oppose any proposal that diverts limited state general fund revenues to private education while failing to provide the funding support of public education needed to preserve the constitutional rights of each child to access a basic system of free quality schools that fulfills the educational potential of each person.

- and methods of instruction.
- Authorize school districts to employ without restriction nonlicensed persons as professional educators.
- Repeal Montana teacher tenure.
- Circumvent local school board authority to determine which school employees may carry guns in public schools.
- Mandate PIR content.

MQEC

- Defend and preserve the existing funding formula defined in 20-9-309 MCA, including the final year of the final year of Guaranteed Tax Base (GTB) expansion and funding for the school facilities program.
- Support efforts to address teacher recruitment and retention issues.
- Ensure application of inflation to all elements in the funding formula, particularly special education.
- Successfully defeat
 efforts to fund charter
 schools, tax credits,
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- otherwise be committed to our public schools.
- Successfully defeat assaults against the Board of Public Education's accreditation standards and local district policy.
- Pursue solutions to provide digital equity for all students, particularly functional Internet access and suitable devices to facilitate remote or online learning.
- Obtain sufficient funding for schools to implement required safety procedures to address the COVID-19 pandemic.

MREA

- Ensure full funding of present law.
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- Maintain and enhance local control.

MTSBA

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Governance, Leadership and Accountability:

Statement of Intended
Success, 2025
Locally elected school
boards, administrative
leaders, teachers, staff, local
communities and student
leaders collaboratively focus
on the interests of each
(whole) child educated in our
public schools. This
collaboration and focus is
also reflected in the
relationships among the
statewide public education

MASBO

- Support full funding of present law.
- Support additional funding for special education cooperatives and an inflationary increase of the special education allowable cost appropriation consistent with the other state payments to a school district's general fund.
- Support initiatives and proposals that advance the interests of public schools and students as described in our vision and goals;
- Provide adequate and equitable resources and support to meet the needs of special education students;
- Enhance and ensure continued progress of closing the gap to fully

advocacy groups representing teachers, trustees, administrators, and school business officials. The Legislature, Governor, Board of Public Education, and Superintendent of Public Instruction all actively support and collaborate to continually improve and honor the guarantees of the Montana Constitution. As a result, this chain of advocacy causes Montana schools to be nationally recognized for excellence. Governance and leadership systems support nimble, contemporary and innovative educational platforms that meet the diverse learning needs of all students that empower them to take ownership for their own educational goals and center the development of student social, emotional and behavioral learning.

- Support recruitment and retention of quality educators.
- Support facility and technology infrastructure.
- Oppose public funding for privatization.

MFPE

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- fund public education through the established funding formula and support to schools, including but not limited to, inflation application to K-12 base aid and infrastructure support;
- Advocate that all prek models proposed ensure the implementation of formula-based early childhood education;
- Expand opportunities to meet the needs of at-risk students;
- Support recruitment and retention of excellent educators and staff;
- Ensure the health and safety of students in every Montana school;
- Properly support high quality school conditions and infrastructure;
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- Oppose any proposal that diverts limited state general fund revenues to private education while failing to provide the funding support of public

Expand dual enrollment opportunities across
 Montana.

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- Mandate PIR content.

MQEC

- Defend and preserve the existing funding formula defined in 20-9-309 MCA, including the final year of the final year of Guaranteed Tax Base (GTB) expansion and funding for the school facilities program.
- Support efforts to address teacher recruitment and retention issues.

education needed to preserve the constitutional rights of each child to access a basic system of free quality schools that fulfills the educational potential of each person.

- Ensure application of inflation to all elements in the funding formula, particularly special education.
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Culture, Climate and Social Values: Statement of Intended Success, 2025 Montanans recognize their public schools as the key to the state's future successes. As such, the independent spirit, unique values, respect for all, and strong work ethic of Montanans are well recognized and reflected in each of Montana's public schools. Through our collective dedication to maximizing our resources for excellence, our commitments

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- Provide adequate and equitable resources and support to meet the needs of special education students;
- Enhance and ensure continued progress of closing the gap to fully fund public education

to quality public education in each community, recognizing the diversity of our state, including the preservation of our American Indian culture, and transformational learning environments, all students, regardless of personal circumstance or ability, feel empowered and fully prepared for a successful future. By recognizing the individual needs of each child within the context of each community, each student in Montana's public schools feels safe, supported, respected and loved. Students will be equipped with a high degree of social and emotional intelligence and personal mental wellness. This includes student centered learning that develops independent and critical thinkers who know how to evaluate information and make educated decisions about that information.

- Support recruitment and retention of quality educators.
- Support facility and technology infrastructure.
- Oppose public funding for privatization.

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Community Engagement:

Statement of Intended Success, 2025 Montana's communities understand the generational gift public education provides and the importance of taking pride and ownership in their local public schools, setting high standards, being an integral part of the solution and sharing in the successes of our students and local public schools. Both the community and schools place emphasis on a shared narrative, ongoing collaboration, resource sharing and communication. Publicly celebrating the work of Montana's public schools and telling the stories of students, teachers, staff and administrators has resulted in community engagement and support to ensure the success and

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safety of each child. Montana's public schools and communities have collaborated to energize and effectively individualize public education to increase social, emotional and academic success for each child in Montana. Meaningful community engagement provides opportunities for mutual understanding of the needs of the community and the school, while working jointly towards a robust participatory and informed relationship.

- charter and home schools.
- Dictate school accreditation and teacher licensure standards, curricula, and methods of instruction.

MQEC

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