

Montana K-12 Funding
Needs Assessment
and
Cost Analysis

Draft Report

R. C. Wood & Associates
August 30, 2005

Needs Assessment Overview

Don Robson

Montana K-12 Adequacy
Funding Study

Public Needs Assessment

Construction/Structure

- 23 forced choice items, 1 open-ended
- Response Rubrics:
 - Opinions about **Local Conditions** (strongly agree to strongly disagree, 0=don't know)
 - Opinion about **Local Importance** (very important to unimportant-should not do, 0=don't know).
 - Items built around State Accreditation Standards (Quality definition).

Public Response

(as of 8/15/05)

- 861 total useable responses
 - Parent of Child in School: 314 (37%)
 - Patron (No child in school): 192 (22%)
 - School Board Trustee: 79 (9%)
 - School District Employee: 192 (22%)
 - Other: 84 (10%)

District Type

- K-Elementary: 191 (22%)
- Jr/Middle: 50 (6%)
- 9-12: 87 (10%)
- K-12 – 530 (62%)

Community/School Type

- Rural-Isolated: 220 (26%)
- Class C: 170 (20%)
- Class B: 0
- Class A: 159 (18%)
- Class AA: 312 (36%)

Public Survey Items 1-10

	Agree Condition	high Importance
1 Basic Education results in high achievement test scores	80	89
2 School success measured by success beyond graduation	70	76
3 School success measured by graduation rate	76	82
4 Children get a good quality education in our district	81	91
5 District provides appropriate mix of enrichment for students	71	84
6 District provides appropriate extra help for students who need it	64	81
7 District is able to attract well qualified teachers	58	86
8 District is able to afford modern school facilities	48	79
9 District is able to afford well equipped school facilities	50	82
10 District provides adequate supplies and materials for programs	53	83

Public Survey Items 11-22

	Agree Condition	high Importance
11 Curriculum includes knowledge about contribution of American Indians	47	56
12 Children with disabilities are provided adequate educational services	72	80
13 Gifted and Talented students provided appropriate services	38	75
14 Students have adequate choice of co-curricular/extra curricular activ.	70	78
15 Schools are open and accessible to views and concerns of community	66	84
16 District is able to attract well qualified administrators	58	81
17 District provides well planned prof development for teachers/admin	55	71
18 Federal mandates are adequately funded.	21	67
19 State mandates (i.e., Accred. standards) have been adequately funded	28	72
20 State mandates (i.e., Indian Ed. For All) have been adequately funded	23	52
21 Every MT student deserves the same quality education no matter where	81	84
22 Local control of schools is critical to support of public education	78	81

Top 10 Items: Greatest Need

(Lowest Percent of Respondents Agree with Local Conditions)

- Federal mandates are adequately funded.
- State mandates (i.e., Indian Ed. For All) have been adequately funded
- State mandates (i.e., Accred. standards) have been adequately funded
- Gifted and Talented students provided appropriate services
- Curriculum includes knowledge about contribution of American Indians
- District is able to afford modern school facilities
- District is able to afford well equipped school facilities
- District provides adequate supplies and materials for programs
- District provides well planned prof development for teachers/admin
- District is able to attract well qualified teachers

Top 10 Items: Greatest Importance

(Highest percentage of respondents rate as important)

- Children get a good quality education in our district.
- Basic Education results in high achievement test scores
- District is able to attract well qualified teachers.
- Schools are open and accessible to views and concerns of community.
- District provides appropriate mix of enrichment for students
- Every MT student deserves the same quality education no matter where .
- District provides adequate supplies and materials for programs.
- District is able to afford well equipped school facilities.
- School success measured by graduation rate
- District is able to attract well qualified administrators.

Top 10 Items: Greatest Difference between Importance and Current Conditions

(i.e., high importance vs. low performance)

- Federal mandates are adequately funded.
- State mandates (i.e., Accred. standards) have been adequately funded.
- Gifted and Talented students provided appropriate services.
- District is able to afford well equipped school facilities.
- District is able to afford modern school facilities.
- District provides adequate supplies and materials for programs.
- State mandates (i.e., Indian Ed. For All) have been adequately funded.
- District is able to attract well qualified teachers.
- District is able to attract well qualified administrators.
- Schools are open and accessible to views and concerns of community

23. Percent of Local Support

Percent Local Support

100	2.00%	
90	2.20%	
80	3.20%	
70	5.20%	
60	5.80%	
50	12.80%	31.20%
40	10.70%	
30	21.80%	
20	19.70%	
10	17.00%	
0		69.20%

- Less than 20% feel that the local community should provide the majority of funding for schools
- Nearly 60% of respondents think that the local district should provide less than 30% of the support for schools.

23. Percent of State Support

Percent State Support

100	4.20%	
90	9.30%	
80	18.90%	
70	20.30%	
60	10.80%	63.50%
50	13.00%	
40	6.70%	
30	4.40%	
20	2.30%	
10	10.10%	
0		36.50%

- Approximately 67% feel that the State should provide 50% or more of the funding for schools.
- Fewer than 25% feel that the State should provide less than 40% of the funding for public schools.

District Needs Assessment

- 331 Administrative Units from OPI Directory of public schools.
- District numbers (Le) were used as “usernames” (ID) for logon to the web site.
- Each District Number was also given a password for exclusive entry.
- IDs and passwords were reported with responses.

District Needs Assessment - Structure

- The definition of an adequate (quality) education was identified as the current State Accreditation standards.
- Seven major aspects were addressed in the construction of the instrument (forced choice):
 - Curriculum and co/extra-curriculum Areas
 - Leadership, Instructional Monitoring and Support
 - Curriculum Review and Assessment
 - Instructional Support Services and Arrangements
 - Professional Development
 - School Climate and Organizational Improvement
 - Open-ended questions

Curriculum, co-curriculum, & Extra- curriculum Areas

- Responses at 3 levels:
 - K-elem
 - K-middle/jr.high
 - 9-12
- Current Status Query:
 - Exceptional (major strength)
 - Good (Exceeds requirements)
 - Adequate (meets expectations)
 - Deficient (marginally adequate)
 - Poor (does not meet expectations)
- Local Funding Decisions:
 - High Local Priority
 - Moderate Local Priority
 - Low Local Priority
- Local Performance Trend:
 - Traditionally Excellent
 - Maintaining Quality Levels
 - Improving Quality
 - Deteriorating Levels of Quality
 - Traditionally Poor Quality

15 Curriculum Areas Included:

- English/Reading/Language Arts
- Mathematics/Advanced Mathematics
- Science Curriculum
- Social Studies Curriculum
- Arts Curriculum
- Music Programs
- Health & Physical Education
- Middle Grades Basic Curriculum
- High School Basic Curriculum
- Special Education Services
- Library/Media Services
- Guidance Services
- Intramural athletics and activities
- Clubs and student activity organizations
- Boys and Girls Interscholastic Athletics

Curriculum Areas - Questions

- Adequate materials and operating resources?
- Modern facilities?
- Recruitment of qualified staff?
- Retention of qualified staff?

Leadership, Instructional Monitoring and Support

- Compliance with the standard?
 - Yes
 - No
 - N/A
- For Elementary, High School, K-12 districts;
 - Full-time professional is needed
 - Part-time is sufficient
 - Regional/County leader is sufficient
 - Regional/County leader is not sufficient
 - Cannot meet this requirement
- Local History
 - Able to recruit and retain qualified professionals
 - Difficult to recruit qualified professionals
 - Frequent turnover, cannot retain certified professionals

Curriculum Review and Assessment

- Responses at 3 levels:
 - K-elem
 - K-middle/jr.high
 - 9-12
- Current Status Query:
 - Exceptional (major strength)
 - Good (Exceeds requirements)
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 - Traditionally Poor Quality

Instructional Support Services and Arrangements

- Current Status Query:
 - Exceptional (major strength)
 - Good (Exceeds requirements)
 - Adequate (meets expectations)
 - Deficient (marginally adequate)
 - Poor (does not meet expectations)
- Local Funding Decisions:
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 - Improving Quality
 - Deteriorating Levels of Quality
 - Traditionally Poor Quality

Professional Development

- Current Status:
 - A comprehensive plan is in effect
 - Individual schools develop plans
 - Only ad-hoc activities occur
 - Few activities, no overall plan
 - No discernable activities
- Local Priority:
 - Critical importance, very high need
 - Important if there is extra money
 - Nice but not necessary
 - Not educationally relevant
 - Waste of resources
- Quality:
 - Consistently high quality
 - Usually well provided
 - Uneven, variable
 - Usually inadequate
 - Consistently poor
- Local History:
 - Staying Excellent
 - Improving steadily
 - Staying Adequate
 - Declining Quality
 - Staying poor

School Climate and Organizational Improvement

- Current Status:
 - A comprehensive plan is in effect
 - Individual schools develop plans
 - Only ad-hoc activities occur
 - Few activities, no overall plan
 - No discernable activities
- Local Priority:
 - Critical importance, very high need
 - Important if there is extra money
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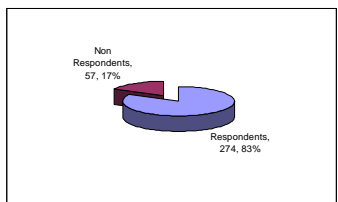
Open-ended questions

- By what measures would you judge your school to be most successful?
- What measures should be used to judge success of Montana's schools?
- What are your most severe budgetary problems relative to current funding?
- What proportion of state funding do you believe is appropriate for Montana's public schools? (State, Local, Operating, Capital)
- In what areas should local districts be responsible for augmenting State support?
- Should Local support be capped? If so, at what level? Why? Why not?
- Suggestions/ideas for helping Montana school districts to be able to recruit and retain good teachers/administrators?

Open-ended questions

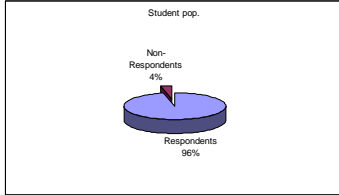
- Teacher recruitment and retention items:
- What are your major problems attracting qualified teachers to your district?
- What are the primary recruiting assets for your district?
- What, if any, recruiting incentives do you have at your disposal to attract good teachers?

Overall Response Rate



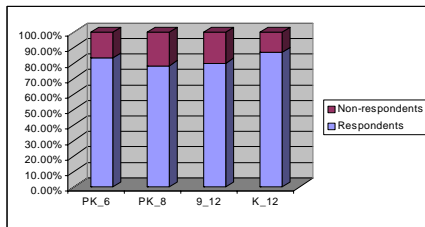
Total	N=
83%	274
17%	57
100.00%	331

Students Represented by Respondents



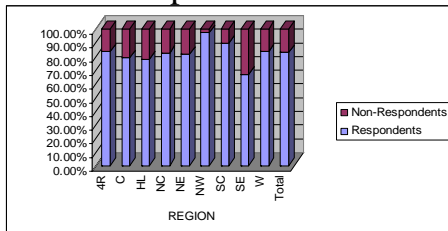
	Student pop.
Respondents	143531
Non-Respondents	5477
Total	149008

Response Rate



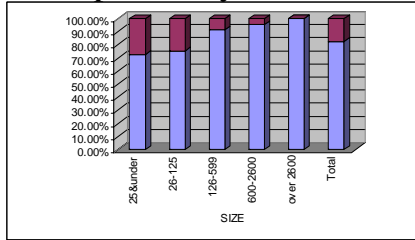
	PK_6	PK_8	9_12	K_12	Total	N=
Respondents	83.30%	78.30%	80.00%	86.90%	82.80%	274
Non-respondents	16.70%	21.70%	20.00%	13.10%	17.20%	57

Response Rate



	REGION									Total
	4R	C	HL	NC	NE	NW	SC	SE	W	
Respondents	83.32%	78.93%	77.80%	82.60%	81.32%	87.10%	89.70%	66.70%	83.32%	82.80%
Non-Respondents	16.70%	21.10%	22.20%	17.40%	18.68%	2.90%	10.30%	33.30%	16.70%	17.20%

Responses by School Size



SIZE						
25&under	26-125	126-599	600-2600	over 2600	Total	N=
72.50%	75.30%	91.40%	95.30%	100.00%	83%	274
27.50%	24.70%	8.60%	4.70%	0	17%	57
66	64	96	41	7	100.00%	331

Statistical Analysis and Needs Assessment

Merle J. Farrier
Don Robson

**“Today, education is perhaps
the most important function of
state and local governments.”**

The US Supreme Court (*Brown v. Board of Education*), cited by Montana
District Court Judges Henry Loble and Jeffery Sherlock

Preliminary Remarks

- The goal of this research was to provide findings and conclusions that would have been reasonably reached by any other researcher conducting this research at the same time and in the same manner.
- This purpose of this research was to determine the additional cost, if any, for the state to provide sufficient funding to meet its own statutory obligation of providing a quality education. Consequently, the costs calculated are those costs that would be expected of the state and does not factor in federal money. Therefore, federal funds are not utilized in this study in a way that would diminish the state's obligation to fund the state's requirements.

SB152 Defined Quality Education

- Accreditation standards
- Special education/special needs
- Indian Education for all
- Qualified and effective teachers/administrators
- Facilities/distance learning
- Transportation
- Assessment of student achievement
- Preservation of local control

Terminology

The following terms require some clarification:

- **School**...refers to a self contained facility for education (Sc numbers identify individual schools...≈ 6,128 schools)
- **School District**...refers to a budget unit that may include one or more schools. (Le – legal entity – numbers are used to identify school districts, i.e., budget units...436 SD)
- **School System or Administrative Unit**...a school system or administrative unit may include one or more school districts. School systems are identified with Ss numbers...331 operating administrative units.

For example, Broadwater School is school number Sc 655, belongs to school district number Le 487 (Helena Elementary) , and is part of school system Ss 611 (Helena Public Schools).

Independent Elementary Schools are schools that are K-8 (though not necessarily offering all K-8 grades).

These schools form school districts without formally sharing administrative oversight with high schools. (166 of these schools)

County High Schools are high schools configured similar to the independent elementary school districts. They do not share administrative oversight with elementary schools. (5)

Joint or Combined School Districts are school districts in which a high school district is physically comprised of two or more elementary school districts but combined with one of them. The high school tax base is the sum of those elementary school district's tax bases. (105)

K-12 School Districts are those districts having a single elementary district and high school district that share the same property tax base and have a unified budget. (55)

• **Population of Schools for this Study.** The population of school districts for this study does not include the three schools funded by the State of Montana. These three schools are not directly under the definition of SB152. These three schools are the School for the Deaf and Blind and the two corrective schools, that is, Riverside and Pine Hills. These schools have been asked to provide input for this study that addresses their funding needs and their reports will be included in the final written report for legislative consideration. For the purposes of this research, a total of 436 school districts were analyzed.

• **Enrollment...** enrollment, for this study, refers to a simple head count taken in the fall of the school year. Enrollment is sometimes reported based upon an adjusted enrollment in which 19 year old students and others students not eligible for present funding are eliminated from the count. All students who were present in a classroom are counted here regardless of other legal limitations.

Component One

State Accreditation Standards

Required Personnel

- Administrators (10.55.704 & 10.55.705)
 - District
 - School
- Curriculum Coordinators (10.55.704)
- Library Media Services (10.55.709)
- Guidance Staff (10.55.710)
- Teachers (10.55.712 & 10.55.713)
 - Elementary
 - High School

Administrators

The minimum required assignment of district administrators (superintendents) and school administrators (principals) is based upon the number of certified staff and/or the number of students.

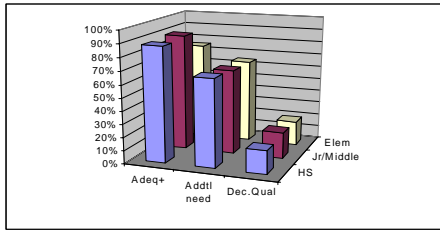
Summary of *District* Administration

Superintendents	Minimum	Actual	County Supt
	FTE	FTE	# Sch Dists
Indep Elem	16	19	150
Joint Elem	51	46	54
Joint HS	31	41	74
Co HS	3	3.5	2
K-12	24	32	31
Total	125	142	311

Summary of *School* Administration

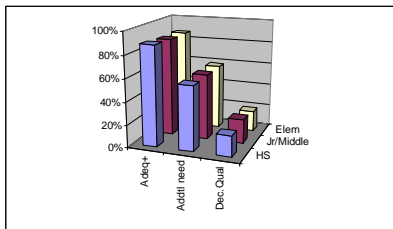
Principals	Minimum	Actual	CSupt/SupT
	FTE	FTE	# Sch Dists
Indep Elem	39	53	123
Joint Elem	128	229	23
Joint HS	82	131	42
Co HS	4	4	1
K-12	44	71	3
Total	296	487	192

3.1 Able to hire qualified & licensed school leaders to meet accreditation Standards.



	Adeq+	Addtl need	Dec. Qual
HS	88%	67%	18%
Jr/Middle	90%	65%	20%
Elem	76%	65%	19%

3.1.1 Full or part-time superintendent (or supervising teacher) as required

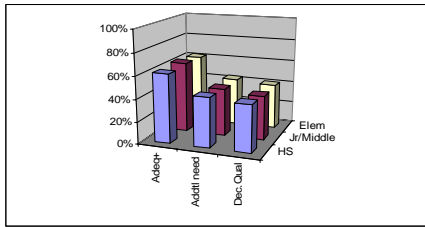


	Adeq+	Addtl need	Dec. Qual
HS	89%	58%	18%
Jr/Middle	87%	58%	22%
Elem	87%	58%	19%

Curriculum Coordinators

Curric Coord	Minimum	Actual	Regional
	FTE	FTE	Coordinator
Indep Elem	0	.2	166
Joint Elem	8	13	97
Joint HS	7	10	98
Co HS	0	4	5
K-12	0	3	55
Total	15	31	421

3.1.2 Regional or full-time curriculum director as needed and required.

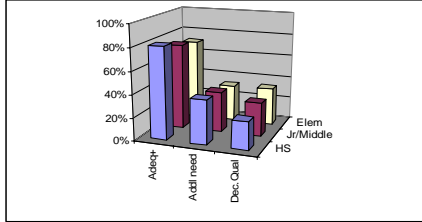


	Adeq+	Addtl need	Dec. Qual
HS	62%	45%	42%
Jr/Middle	54%	43%	40%
Elem	62%	43%	41%

Guidance Counselors

Guidance	Minimum	Actual	PT/ALT
	FTE	FTE	# Sch Dists
Indep Elem	31	32	131
Joint Elem	171	180	31
Joint HS	93	145	52
Co HS	3	4	1
K-12	38	53	23
Total	336	414	238

5.2.1 Adequate Guidance materials and operating resources



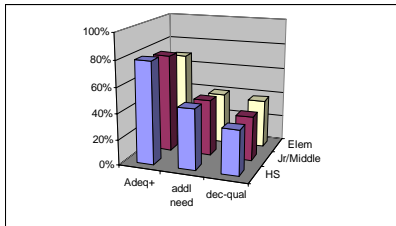
	Adeq+	Addl need	Dec. Qual
HS	81%	99%	25%
Jr/Middle	75%	36%	30%
Elem	72%	33%	33%

Media

Media/Librarians	Minimum	Actual	PT/ALT
	FTE	FTE	# Sch Dists
Indep Elem	23	39	131
Joint Elem	70	179	31
Joint HS	47	84	52
Co HS	2	4	1
K-12	24	51	23
Total	166	356	238

5.2.3 Recruit qualified Lib/media staff

	Adeq+	addl need	dec-qual
HS	79%	47%	35%
Jr/Middle	76%	44%	35%
Elem	70%	40%	38%



Teachers!



Assumptions

- These calculations reflect **REGULAR** education only.
- These calculations are intended to determine how many positions are necessary to meet accreditation standards, **not** whether they are filled with appropriate personnel.
- Insofar as possible, all quantitative accreditation standards were applied to the calculations.
- When not possible to quantitatively determine teacher FTE, present practices were examined and when reasonable to do so, present practices were integrated with the calculations.
- A buffer of four students was applied to all classroom limitations.
- Kindergarten students were counted full-time for all districts.

Procedures

- When classroom enrollment configuration was not available, present practices were analyzed. The most successful statistical representation of present practices regarding teacher assignment was reflected with Pearson r correlations. Given a sufficiently strong Pearson r-value, general consistency among school districts was presumed to represent an assignment of teacher FTE that provided the level of teacher staffing necessary for meeting accreditation standards for most districts.

Independent Elementary Districts

- All 166 of these districts were assigned the number of teachers necessary to provide for dividing every elementary classroom at the point class enrollment is within four students of the maximum allowable.
- One and two teacher schools were calculated based upon single teacher and mutigrade classrooms respectively.
- For schools requiring three through seven teachers, two methods of computation were used and the higher of the two methods was reported.

Independent Elementary Districts

- When enrollments reached 80, schools tended toward single grade classrooms. This was also the threshold at which some grades approached maximum enrollments and required two teachers in at least one grade. At this point, minimum teacher FTE was computed for each grade level in each school based upon the somewhat larger class sizes allowable in the standards. Therefore, the number of K-8 teachers calculated in this analysis would provide for a new teacher to form a new class when enrollments reach four students below the maximum class size allowed.

Summary of Independent Elem FTE

	Required FTE	Actual FTE
Ind Elem Schs	1101	1164

A linear regression was conducted between the required FTE calculated for three or more teacher schools and their enrollments.

A Pearson r was calculated to be .99 with $r^2 = 99\%$, $p < .0001$. The resulting regression equation is:

FTE for indep elem teachers = $.053 \times (\text{enrollment}) + 2.41$

Joint School Districts

High Schools

- High schools are difficult to analyze in the same manner as the elementary districts. Class sizes are generally limited to 30, but it is difficult to know when a class has reached 30 given many classes allow for enrollment from more than one grade.
- Teachers are limited to 150 students per day, making it difficult to determine how many periods per day a teacher with larger classes is eligible, under accreditation standards, to teach every day.
- The state defines specific classes that must be taken. They are:

Required High School Classes

English	4 years
Mathematics	3 years
Science	
Social Studies	
Vocational Education	2 years
Arts	
World Languages	
Electives	
Health Enhancement	1 year

A minimum of 20 units are required for graduation

Joint School Districts

High Schools

- Additional accreditation standards make it clear that there is, in addition, an unspecified curricula required that “enables all students to meet the content and performance standards” of the state and local school board.
- Thus, the most practical method to determine the baseline teacher FTE required to meet both the quantitative and qualitative accreditation standards is to analyze the present practices currently functioning under these standards.

Joint School Districts
High Schools

- The most productive method used to analyze relationships among schools' present practices regarding assignment of teacher FTE was a Pearson r correlation. The resulting correlation between actual teacher FTE and their enrollments was
r = .9999

Number of Joint HS teacher FTE = .0564 x (Enrollment) + 4.2

r² = 99.9%,
p < .0001

Joint School Districts
High Schools

- As a result of the high consistency of FTE assignment relative to enrollment, the joint high school districts are considered to be allocating resources for teachers in such a way that districts are at the level in which their class offerings are addressing the varied requirements of the accreditation standards.

Joint School Districts
Elementary

- Joint elementary schools presently configure their 7th and 8th grades in a high school format and are funded at the high school level. While some schools also include other elementary grades in a middle school format, the state does not provide for funding these other grades at the high school level. Therefore, this analysis calculates 7th and 8th grade enrollments separate from elementary enrollment and leaves the remainder in a K-6 structure.

The K-6 required FTE for joint elementary school districts was calculated in the same manner as the K-8 enrollment for the independent elementary school districts. That is, an enrollment of 80 was considered a threshold in which multigrade and single grade classrooms were distinguished and FTE calculated accordingly.

Joint School Districts

Elementary

7th & 8th

- A number of methods were used to determine the best means to compute the 7th and 8th grade teacher FTE. The most useful procedure was to treat their enrollment as a separate entity and conduct a regression on their actual FTE and enrollments. The resulting r-value was .97 (adjusted r² = 93%) and provided a predictor equation of:

Joint 7/8th teacher FTE = .0945 x (Enrollment) - .15

County High Schools K-12 School Districts

- Similar methods also were applied to the elementary, 7th and 8th grades, and high school enrollments of these schools. Again, very high correlations in the r = .99 range were found among high school, 7th/8th graders, and K-6 students and actual teacher FTE.

Summary of Min Teacher Requirements

Teachers	Enrollment	Minimum	Actual
	K-8	FTE	FTE
Indep Elem	16,041	1,101	1,164
Joint Elem	70,399	4752	4,751
Joint HS	40,488	2,781	2,788
Co HS	1,255	92	89
K-12	10,939	1,411	1,407
Total	145,165	10,136	10,190

**Summary of Personnel FTE
as Required per
MT Accreditation Standards**

It is the conclusion of this portion of the study that the district and school administrators, curriculum coordinators, guidance counselors, media specialists, and teachers who are presently employed in the 436 school districts analyzed are sufficient in **number** to meet the appropriate accreditation standards for regular education.

FTE Summary (continued)

- Determining the number of educators necessary to meet accreditation standards is only the first step. This conclusion does not make any inferences that the present funding structure provides districts with the financial means to distribute these educators across all 436 school districts in a way that meets accreditation standards in each district, nor with the correct endorsements.
- The cost of attracting, hiring, and retaining qualified educators will be addressed by Dr. Young and Dr. Stoddard.

Instructional Aides

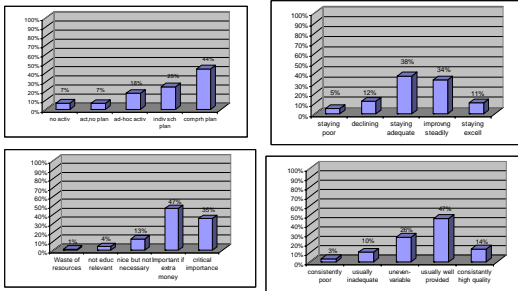
Instructional aides are addressed in standard 10.55.714. Regular education uses aides, in part, to address classroom enrollments above the accreditation maximum. The methodology used in this study for computing the minimum number of teachers required provides for a new teacher before class enrollment requires an aide; therefore, the number of teachers recommended herein precludes the need for aides for use to help manage an overloaded classroom. Resource room and special purpose aides are addressed elsewhere in the definition of quality education.

Professional Development

Professional development is addressed in standard 10.55.714. All teachers and specialists are required to complete three PIR days per year. Presently, using the ANB method of funding, up to seven additional days are added to the funding total for each school district, if seven days are requested and approved. The additional funding comes from the ANB entitlements only and amounts to approximately \$25 per student per day, or \$335 per day per teacher.

If the ANB method of funding is discontinued, there is approximately \$23,000,000 to \$25,000,000 of funding that exists, in part, for professional development that may be lost in the transition to a new funding formula.

8.4 Annually determined district-wide professional development budget



Curriculum Development and Assessment

Standard 10.55.603 lists several requirements for school districts that have financial implications. The assessment requirements in this standard will be addressed separately in the assessment component of this study. The curriculum requirements include:

- Curriculum alignment to state content and performance standards and to review at least every five years.
- The curriculum review is to contribute to the decisions regarding new curriculum development.
- The curriculum review is to encompass Indian Education for All.
- Tracking graduates and other students not in attendance and use information for curriculum development and assessment.

Curriculum Development and Assessment

Assessment requirements in 10.55.603 include

- assessment of all students and used for program effectiveness.
- provide measures of standards and methods to assess student progress in achieving content and performance standards in all programs.
- use multiple measures and methods to assess student progress in achieving content and performance standards in all programs.
- provide measures of standards that are not adequately assessed by norm-referenced tests in reading and math in grades 4, 8, and 11.

Curriculum Development and Assessment

The analysis of educator FTE found that 421 out of 436 school districts were not required have a district curriculum director, leaving 15 districts subject to requiring a FTE curriculum director. The actual FTE for curriculum directors was twice that, i.e., 31 FTE curriculum coordinators, indicating a need well beyond the minimum accreditation levels.

While school districts appear to be providing FTE meeting the accreditation standards, the development of curriculum is obviously a very critical component of the accreditation standards and the success of schools, the appropriate level of funding needs to be examined in light of the needs assessment and professional judgment data. Based upon that data, the legislative committee may want to consider adjusting the level at which more districts are funded to support curriculum coordinators.

Elementary Curriculum

(NOTE: Percentages are from different scales – do not sum to 100%)

	Exc-Adeq	High Priority	Det-Poor	Prior Decline
English	76%	66%	24%	90%
Sciences	65%	55%	33%	88%
Math	77%	61%	25%	86%
Extra-c speech	30%	16%	68%	84%
extra-c music	45%	34%	49%	83%
Extra-c drama	37%	17%	64%	80%
Boys athl	54%	32%	43%	75%
SPED	83%	49%	25%	74%
Girls athl	55%	31%	43%	74%
Social Studies	79%	49%	25%	74%
Lib/Media	76%	37%	36%	73%
Art	60%	33%	40%	72%
InterMural ath	44%	19%	51%	71%
Music	64%	43%	25%	68%
Guidance services	72%	33%	33%	66%
HPE	70%	30%	32%	62%

Jr/Middle Curr. Materials/ops

(NOTE: Percentages are from different scales -- do not sum to 100%)

	Exc-Adeq	High Prior	Det-Poor
English	69%	61%	30%
Math	72%	59%	33%
Sciences	61%	57%	38%
Music	75%	52%	27%
Social Studies	57%	48%	40%
SPED	65%	46%	34%
Lib/Media	70%	39%	30%
Girls athl	77%	37%	33%
Boys athl	46%	37%	52%
extra-c music	61%	37%	40%
Guidance services	60%	36%	40%
HPE	54%	36%	42%
Art	35%	33%	60%
InterMural ath	45%	23%	55%
Extra-c speech	69%	16%	34%
Extra-c drama	75%	16%	30%

Jr/Middle Curr. Materials/ops

(High Priority + Deteriorating = High Deteriorating)

(NOTE: Percentages are from different scales -- do not sum to 100%)

	Exc-Adeq	High Prior	Det-Poor	High-Det
Art	35%	33%	60%	93
InterMural ath	45%	23%	55%	78
Boys athl	46%	37%	52%	89
HPE	54%	36%	42%	78
Social Studies	57%	48%	40%	88
extra-c music	61%	37%	40%	77
Guidance services	60%	36%	40%	76
Sciences	61%	57%	38%	95
SPED	65%	46%	34%	80
Extra-c speech	69%	16%	34%	50
Math	72%	59%	33%	92
Girls athl	77%	37%	33%	70
English	69%	61%	30%	91
Lib/Media	70%	39%	30%	69
Extra-c drama	75%	16%	30%	46
Music	75%	52%	27%	79

High School Curr. Materials/ops

(NOTE: Percentages are from different scales -- do not sum to 100%)

	Exc-Adeq	High Priority	Det-Poor
English	81%	66%	33%
extra-c music	81%	53%	25%
Extra-c speech	79%	28%	23%
SPED	75%	47%	27%
Girls athl	74%	50%	21%
Art	73%	38%	31%
Boys athl	71%	50%	31%
Social Studies	71%	50%	31%
InterMural ath	71%	24%	31%
HPE	70%	39%	33%
Music	67%	61%	34%
Lib/Media	64%	38%	35%
Math	63%	64%	35%
Sciences	57%	63%	46%
Guidance services	54%	39%	46%
Extra-c drama	51%	27%	48%

Additional Accreditation Requirements

The following requirements represent a direct cost to school districts but are discussed separately in the other components in this study. These accreditation requirements are presented here for clarity and to establish the basis of their inclusion in the definition of quality education.

School Climate

School climate, addressed in 10.55.801, represents a rather open requirement as far as cost and funding is concerned. Of particular importance for funding considerations are 1(c), 1(e), and 1(f). These three parts require schools to create conditions that meet district goals, maintain a quality teaching staff, offer programs that are free of stereotyping based upon a number of factors, and provide programs that meet the needs of at risk students.

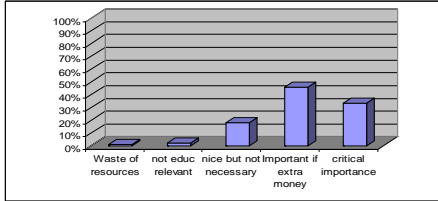
These requirements are discussed in other components of this study and their cost will be presented at that time.

Opportunity of Educational Equality

Standard 10.55.802 is equally open ended. This standard requires each district to provide for the equality of educational opportunity regardless of sex, race, marital status, national origin, physical, or mental conditions. These opportunities are to include programs, facilities, texts, curriculum, counseling, library services, and extracurricular activities.

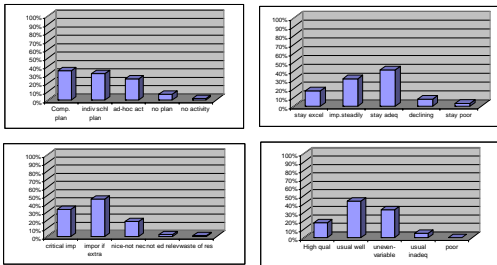
This standard seems to suggest that school districts will offer at least the specific opportunities enumerated and then, within those opportunities, ensure that an equality of opportunity exists.

9.4.2 Culturally relevant, inclusive and current learning resources are provided.

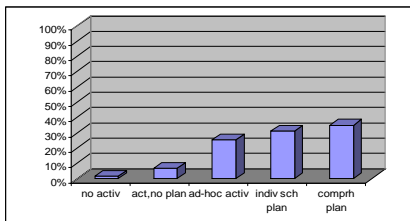


Waste of resources	not educ relevant	nice but not necessary	important if extra money	critical importance
1%	2%	18%	46%	33%

9.4.2 Culturally relevant, inclusive and current learning resources

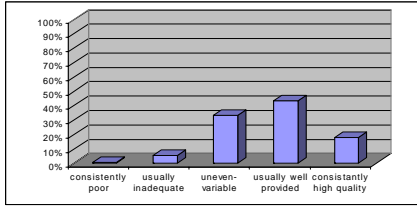


9.4.2 Culturally relevant, inclusive and current learning resources are provided.



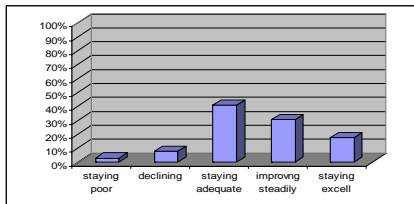
no activ	act,no plan	ad-hoc activ	indiv sch plan	comprh plan
2%	7%	25%	31%	35%

9.4.2 Culturally relevant, inclusive and current learning resources are provided.



consistently poor	usually inadequate	uneven-variable	usually well provided	constantly high quality
0%	5%	33%	43%	18%

9.4.2 Culturally relevant, inclusive and current learning resources are provided.



staying poor	declining	staying adequate	improving steadily	staying excell
3%	8%	41%	31%	18%

9.2 Program elements provide for equality of opportunity for all students.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	staying poor	5	1.5	2	2
	declining	13	3.9	5.3	7.3
	staying adequate	73	22	29.8	37.1
	improving steadily	80	24.1	32.7	69.8
	staying excell	74	22.3	30.2	100
	Total	245	73.8	100	
Missing	0	26	7.8		
	System	61	18.4		
	Total	87	26.2		
Total	Total	332	100		

9.4.1 Equal learning opportunity for Indian & minority students.

Valid	staying poor	5	1.5	2.1	2.1
	declining	15	4.5	6.4	8.5
	staying adequate	81	24.4	34.3	42.8
	im provng steadily	63	19	26.7	69.5
	staying excell	72	21.7	30.5	100
	Total	236	71.1	100	
Missing	0	35	10.5		
	System	61	18.4		
	Total	96	28.9		
Total		332	100		

Learner Access

10.55.803 provides for equality of opportunity to include

- matching interests, readiness, and learning styles to learning experiences.
- cultural diversity of minorities, particularly Am Indian students.
- develop an understanding of values and contributions of Montana American Indians for all students.
- develop learning resources that are culturally relevant.
- provide equal access to learning resources, including technology.
- provide instructional materials that are compatible with previous and future offerings.
- provide books and materials that reflect authentic history and contemporary portrayals of American Indians.
- Using school criteria, identify at risk and special needs students.

9.4 School provides access & equality of opportunity for all learners

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	staying poor	3	0.9	1.3	1.3
	declining	6	1.8	2.6	3.9
	staying adequate	70	21.1	30	33.9
	improving steadily	61	18.4	26.2	60.1
	staying excell	93	28	39.9	100
	Total	233	70.2	100	
Missing	0	38	11.4		
	System	61	18.4		
	Total	99	29.8		
Total		331	100		

Gifted and Talented

- Schools shall provide educational services to gifted and talented students commensurate with their needs.
- Each school must comply with all federal and state laws and regulations addressing gifted and talented.
- Each school shall provide structured support and assistance to teachers in identifying and meeting gifted and talented student needs.

10.55.804

Special Education

- Each school must comply with all federal and state laws and regulations addressing special education.
- Each school shall provide structured support and assistance to teachers in identifying and meeting special education student needs.

10.55.805

Board of Trustees

There are a number of smaller expenses required in the accreditation standards such as expenses related to the functioning of the school boards, that, in the absence of expressed concern in the needs assessment and/or professional judgment data, it is presumed that no additional funding is necessary to meet these requirements.

What is not addressed in the standards

There are many other positions within school districts that are necessary, but not addressed in the standards. The support staff within a school including maintenance, clerks, secretaries, business managers, cooks, technology supervisors, etc. are absent from the standards specifically, but implicit in standards such as 10.55.801 which says in part "...create conditions that meet the district's goals and attract and maintain a quality teaching staff."

The analysis of the accreditation standards to this point included only regular education and the items specifically quantifiable in the standards. The qualitative portions of the accreditation standards are discussed in the other methodologies.

Component Two Special Education Special Needs

Special Education, Special Needs

The special education and special needs component, while part of the accreditation standards, is emphasized separately in SB152 owing to the importance of addressing this issue. The following topics will be discussed in this component:

- students with disabilities,
- students falling under Section 504,
- students who are at risk,
- students with limited English proficiency, and
- students who are gifted and talented.

Special Education

Special education is very difficult to determine a district by district cost owing to the potential for a district to have very large costs for any given year relative to another district the same size.

Fortunately, special education now has a substantial history and its costs, while continuously under litigation for clarification, are fairly well established.

Funding mechanisms are in place to assist school districts with extraordinary costs.

Special Education

However, the funding scheme requires schools to pay approximately 1/3 of their special education costs from their general funds. While additional funding is added to the general fund for special education purposes, the amount of funding is not based upon actual liability.

While the needs assessment indicates that special education funding requirements are being met, there is a very strong concern regarding the source of the funding, the implication being, perhaps, other goals and priorities are not adequately funded as a result.

Special Education

- Therefore, additional funding may not be as necessary as is creating funding dedicated to the education of special education and special needs students.
- Presently, the accreditation standards do not provide any guidance regarding the assignment of special education teachers, other than general guidelines for regular education. The state should seek expert advice from coop directors and determine a reasonable FTE assignment level for special education teachers.

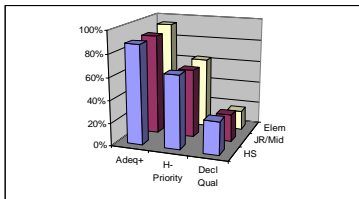
Special Education

- Special education aides and other necessary professionals and professional services are determined from students' Individual Education Plans (IEP). Once these costs are part of the IEP, they become a required cost and it is reasonable that appropriate funding be available to school districts.
- Medical care, technology, and other assistive means are often necessary over and above regular education in order to provide for equality of opportunity as previously discussed. These requirements, as part of an IEP, should also be acknowledged as a separate expense to school districts and funded as necessary.

Some observations

- All grade levels report currently adequate or better conditions in terms of employing properly certified and licensed professionals in special education.
- Most districts (irrespective of grade level) view employing special education professionals as a high priority, and
- A greater percentage of high schools than elementary schools report declining ability to hire licensed special education professionals.

Properly licensed & endorsed professional is employed



	Adeq+	High Priority	Declining Quality
HS	88%	65%	29%
JR/Mid	89%	61%	24%
Elem	94%	63%	17%

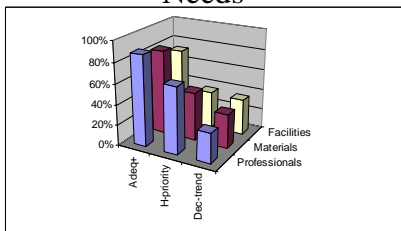
Observations about operations of special education programs

- A high percentage of schools (irrespective of grade level) report adequate or better operating resources for special education.
- As a result, less than half of the districts see this as a high budget priority.
- However, roughly one-fourth to one-third of the districts report declines in this area.

Observations about special education facilities

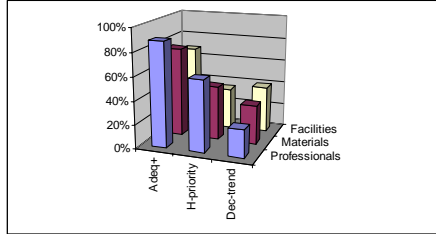
- A high percentage of schools report adequate to better facilities and equipment for special education programs.
- As a result, only slightly more than one-third of the districts report facilities as a high priority.
- However, roughly this same percentage report declines in this area.

High School Special Education Needs



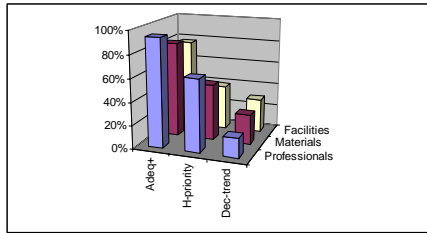
	Adeq+	H-priority	Dec-trend
High School Professionals	88%	65%	29%
Materials	82%	47%	33%
Facilities	73%	36%	35%

Jr/Middle Special Ed. - Needs



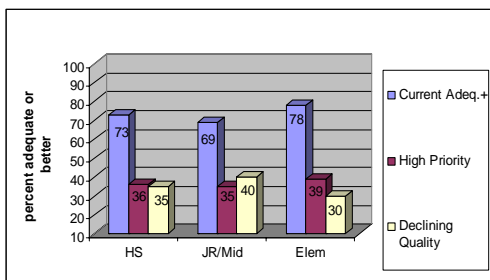
	Adeq+	H-priority	Dec-trend
Professionals	89%	61%	24%
Materials	76%	46%	33%
Facilities	69%	35%	40%

Elementary Special Ed. Needs



	Adeq+	H-priority	Dec-trend
Professionals	94%	63%	17%
Materials	83%	49%	26%
Facilities	78%	39%	30%

Appropriate Special Education Facilities provided



29 USC 794 Section 504 and Accessibility

- Section 504 is analogous to Special Education, though broader in scope. According to the OPI website, "Section 504's requirements (are) to ensure that the educational system provides the full range of special accommodations and services necessary for individuals with disabilities to participate in and benefit from public school education programs and activities." The focus is on subpart C, program accessibility, and subpart D, preschool, elementary, and secondary education of section 504.
- The accessibility aspect of Section 504 has had an impact on public schools over the past few years. Many, if not most, of the schools have addressed accessibility issues and most likely don't pose an immediate need for additional funding based upon Section 504 considerations, though Section 504 costs can be influenced substantially by litigation and subsequent interpretations of school district responsibilities.

At Risk

The first consideration for costing out at risk students is to determine the definition of at risk. Montana's definition of at risk, at least for the purposes of SB152, is as follows: "At risk student means a student who is affected by the environmental conditions that negatively impact the student's educational performance or threaten a student's likelihood of promotion or graduation."

The accreditation standards provide for each school board to determine criteria "that negatively impact the student's educational performance or threaten a student's likelihood of promotion or graduation."

In addition, district personnel are responsible (10.55.803) for identifying at risk youth based upon appropriate criteria.

At Risk

Research has identified many characteristics associated with at risk children, some of which are as follows:

- poverty or being a member of a low-income family,
- living in unstable school districts,
- single parent household,
- language background,
- having parents who are not high school graduates, and
- speaking English as a second language.

9.5 Student risk factors are identified

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	consistently poor	2	0.6	0.9
	usually inadequate	15	4.5	6.5
	uneven-variable	70	21.1	30.3
	usually well provided	106	31.9	45.9
	consistently high quality	38	11.4	16.5
	Total	231	69.6	100

9.5 Student risk factors are identified

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	staying poor	9	2.7	3.9
	declining	17	5.1	7.4
	staying adequate	85	25.6	37
	improving steadily	82	24.7	35.7
	staying excell	37	11.1	16.1
	Total	230	69.3	100

At Risk

Achievement Gap

It is the recommendation of this section of the report that Montana's at risk students, represented in part by a substantial Native American population, should be given a very high priority in the forthcoming determination of allocating of state resources for funding a quality education. The following arguments are advanced to that end:

1. The achievement gap is not so much a legislative problem as it is a statewide challenge. The challenge of addressing the needs of these students represents an exceptional opportunity for the State of Montana and its educational system from pre-school to graduate levels of higher education. If Montana officials were to address this challenge with an intensity and seriousness that simply will not accept failure, an important door will open for all Montana children.

At Risk

Achievement Gap

2. The achievement gap isn't a problem isolated to a certain percentage of our student enrollment; rather, the failure of some to achieve is a condition that affects all. In the same manner, the solution to this problem is a statewide responsibility.
3. When those who struggle the most win, everybody wins.
4. Nothing would validate the excellence of Montana education more than providing a collective influence and support that lends itself to eliminating the achievement gap.
5. Finally, what is learned in the process of solving this problem would help all Montana students achieve better, whether other at risk students, regular education, or gifted.

At Risk

Achievement Gap

The first recommendation is to immediately address this problem by selecting an appropriate committee who will develop and oversee an agenda having aggressive timelines, benchmarks, and assessments.

This committee should request a number of people have differing competencies to assist in reviewing previous research and studies and based upon what is known and what is necessary yet to know regarding Montana's Native American youth and their education. This combined group should develop a list of research questions to be answered prior to implementing a methodology for the solution to this challenge.

Once the committee has given a general structure to the research necessary to be conducted, university personnel, particularly professors and graduate students in the schools of education, should be extended the honor of participating in research that provides the best possible answers to these research questions.

At Risk

Achievement Gap

If the committee and their advisors can engage researchers and hold everybody involved to rigid timelines, a meta analysis of existing research combined with any appropriate findings from research conducted under the direction of the committee would be in place to provide the basis of developing a formal plan during the summer of 2006 and ready to implement beginning with the 2006-07 school year.

This plan would be expected to have identified the most urgent priority that, when successfully addressed, could be expected to lead to better achievement, though not immediately.

The achievement gap will not easily close or it would have been closed a long time ago. It will be important to undertake this challenge with small incremental and prioritized steps. Each step should be assessed according to its purpose.

At Risk

Achievement Gap

For example, if the plan determines that the first incremental step to take toward higher achievement is to improve attendance, then the assessment of the success of the intervention should not be taken from indicators of higher achievement, the measurement of success should be the degree to which attendance has improved. The final goal of higher achievement should be assessed only after the final step has been implemented. The interventions applied are designed *in total* to improve the achievement gap, with each one building the foundation

Closing the achievement gap will never happen if funding is appropriated based upon inappropriate indicators because improving attendance won't lead to meeting AYP and, therefore, a possible loss of funding. It will take a successful implementation of all interventions before the necessary education will result in improving the achievement gap.

At Risk

Achievement Gap

Recommended Costs

It is the recommendation of this portion of the needs assessment and cost analysis that the single most important step the Legislature can take is to make a visible commitment to successfully address the achievement gap in all students, with a particular emphasis on the Native American students who represent a substantial block of the at risk needs.

It would not be difficult to suggest that well in excess of \$50 million could and perhaps will be expended in meeting this problem. However, it would be prudent to fund incrementally, with funding following preparation and findings. It would be expected that the Legislative commitment to fund be understood as a long term commitment and the cost of successful interventions be funded as part of the basic level of funding while funding new interventions on the road to the final end, high achievement for all!

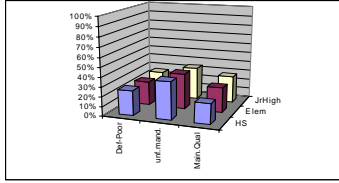
At Risk

Achievement Gap
Recommended Costs

The following costs are suggested for the remainder of the biennium.

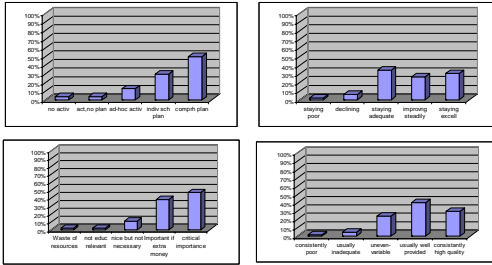
- The necessary costs for a committee to function and ensure the necessary preparation for a viable plan is completed and ready for its initial phase for the 2006-07 school year. \$100,000
- The cost of the first phase of the plan. Provide budget authority of \$5,000,000.
- The above cost is not based upon an actual format...rather it is a seed amount to ensure money is available for a substantial intervention, perhaps on just a single school from each reservation or however the plan determines what is best in order to find what works and what does not work.
- The committee should take their working model and their funding needs for the next two-year phase of their plan to the 2007 Legislature.

Closing the American Indian Achievement Gap

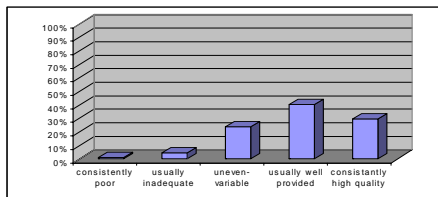


	Def-Poor	unf.mand.	Main.Qual
HS	26%	39%	21%
Elem	25%	37%	26%
JrHigh	26%	34%	28%

9.4.1 Equal learning opportunity for Indian and Minority

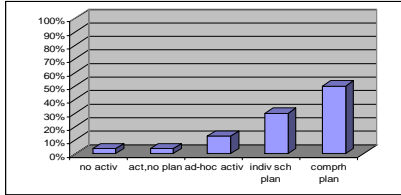


9.4.1 Equal learning opportunity for Indian and Minority



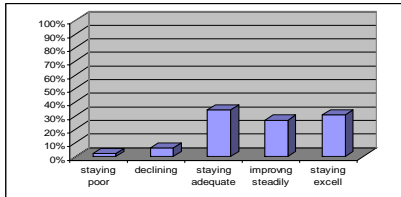
consistently poor	usually inadequate	uneven-variable	usually well provided	consistently high quality
1%	5%	24%	40%	30%

9.4.1 Equal learning opportunity for Indian and Minority



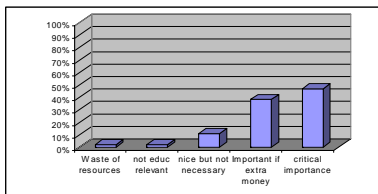
no activ	act.no plan	ad-hoc activ	indiv sch plan	comprh plan
4%	4%	13%	30%	50%

9.4.1 Equal learning opportunity for Indian and Minority



staying poor	declining	staying adequate	improvng steadily	staying excell
2%	6%	34%	27%	31%

9.4.1 Equal learning opportunity for Indian and Minority



Waste of resources	not educ relevant	nice but not necessary	important if extra money	critical importance
2%	2%	11%	38%	47%

At Risk

Limited English Proficiency

This category of at risk should be included in the research agenda of the committee working on the achievement gap.

At Risk

Gifted and Talented

Gifted and talented students are found throughout all cultures and groups in Montana. Funding for G&T programs has been relatively low, ranging somewhere around \$1 per student. Such a low level of funding frustrates the process and many schools have had a difficult time developing and implementing meaningful programs for the G&T students.

A possible approach to providing school districts with a realistic means to meet this accreditation standard in a manner that meets the needs of this population would be similar to the approach recommended for the achievement gap issue.

This approach would provide funding for an agency or private party to collect data from all school districts who would choose to share their programs and the strengths and weaknesses therein.

At Risk

Gifted and Talented

These programs, along with their costs, could be categorized and provided in a form that gives the essential components of each of the types of programs and gives direction to school districts requiring improved G&T offerings to their students.

The same party collecting the above data should also be responsible for enlisting appropriate district educators representing models in each of the categories for formal presentations possibly at MEA/AFT, MCEL, or other similar opportunities, as well as during the summer, possibly in conjunction with School of Education courses being offered. The cost for the data collection, analysis, printing, organization of presenters and presentation schedules, and stipends for the presenters. \$50,000

Based upon the findings and cost of models available, the 2007 Legislature would have a realistic basis for funding G&T and upon adequate funding, have expectations of school districts meeting the accreditation standards for G&T.

9.7 District provides service to meet Gifted/Talented needs.

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	no activ	19	5.7	8.4
	act.no plan	39	11.7	17.3
	ad-hoc activ	54	16.3	24
	indiv sch plan	61	18.4	27.1
	comprh plan	52	15.7	23.1
	Total	225	67.8	100

Component Three
Indian Education for All

Indian Education for All

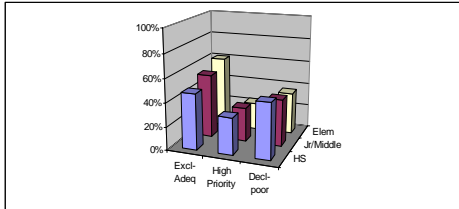
Indian Education for All, as previously noted, is a Constitutional requirement as well as part of the accreditation standards, and now part of the statutory definition of a quality education for all Montana youth.

The importance of this component is clearly evident in the multiple appearances within Montana's legal structure, but not clearly evident throughout Montana public schools. An examination of the needs assessment data will help give a perspective to some of the issues at the school system level.

Indian Education for All

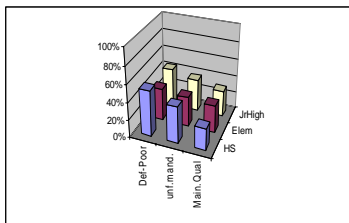
- 4.9 The curriculum is reviewed to reflect the requirements of Indian Education for All.
- 5.4.1 Our schools do an adequate job providing “essential understandings” about Montana American Indians to all students.
- 5.4.2 Our schools provide a “culturally responsive” curriculum relative to American Indians to all students.
- 8.2 There is a district-wide plan for professional development to implement Indian Education for All.
- 9.4.2 The school provides learning resources that are culturally relevant, inclusive and current.
- 9.4.5 The school uses books and materials that reflect authentic history and contemporary portrayals of American Indians.

4.9 Curriculum review for IEA



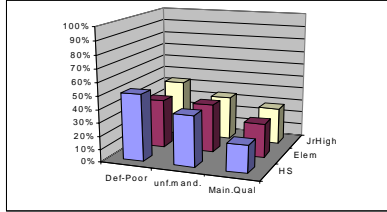
	Excl-Adeq	High Priority	Decl-poor
HS	47%	31%	47%
Jr/Middle	54%	29%	40%
Elem	61%	23%	36%

5.4.1 Essential Understandings of MT Indians



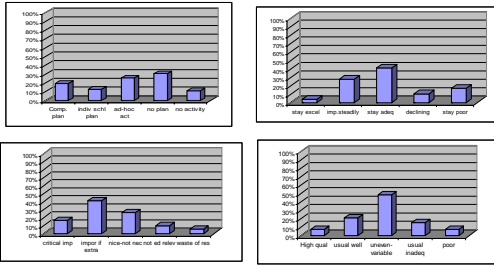
	Def-Poor	unf.mand.	Main.Qual
HS	53%	42%	25%
Elem	37%	34%	31%
JrHigh	44%	37%	30%

5.4.2 Culturally responsive curriculum re: Indians

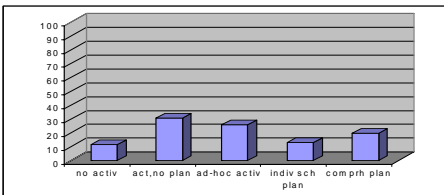


	Def-Poor	unf.mand.	Main.Qual
HS	51%	39%	21%
Elem	37%	37%	26%
JrHigh	43%	34%	28%

8.2 Dist-wide plan for prof. development to implement IEA

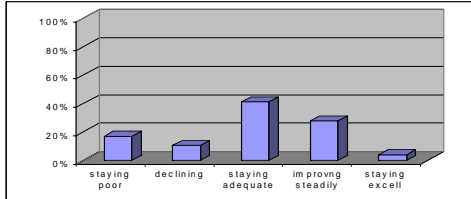


District Professional Development in Indian Education



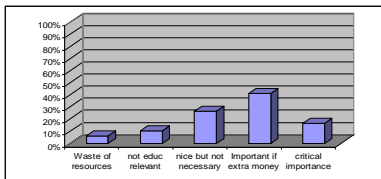
no activ	act,no plan	ad-hoc activ	indiv sch plan	comprh plan
11%	31%	26%	13%	20%

8.2 District-wide professional development in Indian Education



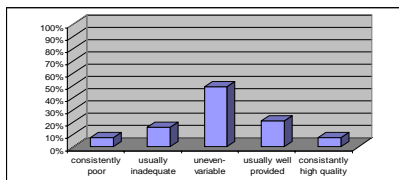
staying poor	declining	staying adequate	improving steadily	staying excellent
17%	10%	41%	28%	4%

8.2 District provides professional development in Indian Education



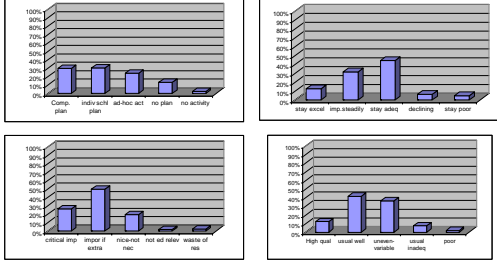
Waste of resources	not educ relevant	nice but not necessary	important if extra money	critical importance
6%	10%	26%	41%	17%

8.2 District provides professional development in Indian Education



consistently poor	usually inadequate	uneven-variable	usually well provided	consistently high quality
7%	16%	49%	21%	7%

9.4.5 Materials reflect authentic history of American Indians



Indian Education for All

Cost

The following spreadsheet is an attempt to put some of the suggestions that have been made from interested parties. This structure is developed in hopes of having a working format that provides a means by which funding may be discussed and adjusted while at the same time provides for a more accurate funding expectation.

This proposed cost is suggested for the first phase and continued funding will be dependent upon the actual needs of the working program that is actually adopted.

Finally, the successful implementation of this program can be expected to be an important part of addressing the achievement gap, which adds an additional importance to ensuring that this Constitutional, statutory, and accreditation standard requirement be successfully met by all school districts.

Indian Education for All Initial and Maintenance Costs

Major Components

Development of curriculum	Initial work begun by Tribal colleges through separate legislative funding	
Completion of curriculum development		5,000,000 *
Initial Start up cost for Materials	\$50 per student initial	7,325,900
Delivery		
Materials		
Maintenance of Materials	\$15 per student/grade-five year cycle	\$2,197,770
Professional Development		
Conferences		
MEA/AFT Convention		\$10,000
Two summer conferences		\$48,000
Classroom Teachers	Teacher training and mentoring -- substitute pay	\$613,380
Training of mentors/trainers		
Stipends	Trainer stipend \$2,500	\$25,000
Release Time	Substitute pay -- Trainers and Mentor/Trainers	\$328,320
Travel	Travel -- Trainers and Mentor/Trainers	\$547,200
Recommended costs for K-12 Indian Education for All		\$16,095,570

Indian Education for All

Assumptions

* The \$5,000,000 for curriculum development is not founded on computation...the variables here are numerous, e.g., the development of new books and materials, the cost of the materials, texts, etc. The cost of \$5,000,000 represents less than \$35 per student.

Two conferences held during the summer, one east MT, one west MT. Each conference to be held for two days with four instructors.
MEA/AFT conference to have a day of sectionals offered to provide updated IEA training and offerings.
Teacher professional development 1 day per teacher per year substitute pay. 10,223 teachers

One trainer of mentor/trainers for each of the five CSPD Regions and five more to be distributed by enrollment
Trainers trained and certified at college level 10
Each region would have one trained mentor/trainer per 500 students
Number of trainer/mentors necessary for MT 2004-2005 Enrollment 146,518 **294**

The trainer stipend is to compensate trainers for time and expense incurred in acquiring the necessary education and training required for state licensure and renewal of licensure and related expenses.

Each trainer and mentor/trainer to have 18 days per year of release time provided by their districts. This time is to be used for working in schools with teaching faculty and other uses to advance full implementation of the Indian Education of All.

Release days	18	Sub Pay	\$60	\$328,320
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Travel pay is based upon 36 travel days per trainer and mentor/trainer at \$50 per trip.

Component Four

Quality and Effective Teachers

Quality and Effective Teachers

The Young and Stoddard study will reflect upon the cost of this component. The needs assessment provided, in addition to the information regarding personnel in Component 1, the following data regarding quality and effective teachers.

Two recommendations that may or may not be part of the Young and Stoddard study but apparent in this portion of the research are as follows:

- A CPI index on salaries be part of the funding mechanism
- A 1% general fund factor for contractually obligated salary schedule increases and health insurance costs beyond the CPI.

Facilities and Distance Learning

This study should include an analysis of:

- the cost of meeting all special needs access codes,
- an inventory of technology and projected cost of updating technology consistent with present and foreseeable future educational needs, including the cost in each district necessary to provide distance learning opportunities,
- a computation of reasonable maintenance and operation costs,

Elementary Facilities - Needs

(NOTE: Percentages are from different scales – do not sum to 100%)

Rank	Subject Area	Currently Deficient	High Priority	Declining or Poor	Priority (+) Decline
1	Elem Science	40.9	41.2	43.2	84.4
2	Elem Math	32.6	42.9	36.5	79.4
3	Elem Music	38.5	34.1	43.1	77.2
4	Elem Speech	54.1	17.8	59.3	77.1
5	Elem English	32.1	42.1	34.7	76.8
6	Elem boys athletics	30.5	36.0	36.8	72.8
7	Elem HPE	38.2	32.0	40.0	72.0
8	Elem girls athletics	29.8	35.8	36.1	71.9
9	Elem drama	44.6	22.7	48.8	71.5
10	Elem Lib/Media	32.1	34.7	36.5	71.2
11	Elem Art	44.3	25.9	44.1	70.0
12	Elem Soc Stdy	32.3	36.7	32.6	69.3
13	Elem Spec Ed	22.1	38.5	30.4	68.9
14	Elem Inter Mural	32.0	31.9	36.5	68.4
15	Elem Guidance	36.0	29.1	38.3	67.4

Jr. High/Middle Facilities - Needs

(NOTE: Percentages are from different scales – do not sum to 100%)

Rank	Subject Area	Currently Deficient	High Priority	Declining or Poor	Priority (+) Decline
1	Jr High Science	45.8	42.2	48.6	90.8
2	Jr High Math	39.6	43.3	46.6	89.9
3	Jr High Music	39.3	40.4	45.2	85.6
4	Jr High English	36.0	42.5	42.0	84.5
5	Jr High Soc Stdy	38.0	37.6	41.2	78.8
6	Jr High HPE	34.5	38.5	40.3	78.8
7	Jr High Art	50.8	27.8	48.9	76.7
8	Jr High girls athletic	22.0	43.6	32.7	76.3
9	Jr boys athletics	21.6	42.9	32.9	75.8
10	Jr High Lib/Media	30.9	38.3	37.5	75.8
11	Jr High Spec Ed	30.9	34.6	40.5	75.1
12	Jr High Speech	43.4	21.3	51.0	72.3
13	Jr High Inter Mur	24.0	34.9	35.3	70.2
14	Jr High Guidance	31.6	36.0	29.9	65.9
15	Jr High drama	35.1	23.6	41.3	64.9

High School Facilities – Needs

(NOTE: Percentages are from different scales – do not sum to 100%)

Rank	Subject Area	Currently Deficient	High Priority	Declining or Poor	Priority (+) Decline
1	HS Science	46.4	45.7	50.7	96.4
2	HS Math	41.6	47.8	45.2	93.0
3	HS English	39.2	47.8	42.7	90.5
4	HS Music	39.0	48.9	38.5	87.4
5	HS boys athletics	24.1	52.7	28.5	81.2
6	HS Soc. Studies	37.2	40.7	40.2	80.9
7	HS girls athletics	23.3	52.3	27.5	79.8
8	HS HPE	32.6	41.2	37.8	79.0
9	HS Art	48.1	33.6	44.5	78.1
10	HS inter mural	26.1	39.2	33.6	72.8
11	HS Spec Ed	27.0	36.4	34.4	70.8
12	HS Lib/Media	22.1	41.7	28.9	70.6
13	HS Guidance	26.3	38.2	31.3	69.5
14	HS Speech	27.8	28.6	38.9	67.5
15	HS drama	25.4	30.7	35.1	65.8

Component Six

Transportation The Three-Mile Rule



Assessment

There are several issues regarding assessment. The most obvious cost of assessment is the basic cost of the test materials and the scoring of the tests. This cost is reportedly around \$10 per student per test. Three grades are required to be tested, or approximately 32,000 students for about \$320,000 per test administered. Other costs are associated with how a district utilizes the test results.

The accreditation standards require utilization of test scores for the purposes curriculum development so it would seem that not only the expense of testing itself should be funded, but indirect costs required to sufficiently utilize the test scores in a way that improves the education of the school system.

Assessment

If a district brings in consultants in order to interpret the tests and their applicability to educational improvement as per accreditation standards, costs can increase substantially. A school district superintendent having an enrollment of approximately 550 students reported, for the purpose of this study, that a cost of \$12,000 was incurred in order to pay for an assessment consultant and teachers to spend a day on proper use of the the test scores of the district students.

Tracking graduates and other students not in attendance is also required, which in some sense, falls under the Assessment component. The cost of this can vary depending upon the personnel available in a district to collect and compile the data. Clearly, some districts may have to hire independent contractors to provide the tracking data.

Assessment

Additional assessment costs are found in the federal requirements, most recently of which is No Child Left Behind (NCLB). Included in the final report will be a list of some of the provisions in NCLB mandate that represent potential costs to the state, and hence, to the school districts if not funded at the state level.

The recommended level of additional funding to support assessment as per the requirements of SB152 is \$3,891,320 as supported by the following spreadsheet. This would suggest a level of funding of \$27 per student. Small schools would need to explore whether they could combine funding and have a common in-service on assessment.

This funding does not provide any financial support for other NCLB requirements; consequently, it is recommended that the state make timely adjustments to K-12 funding as federal mandates require additional funding.

Assessment Costs	
Tests and Scoring	
Cost per test	10
# students	146,000
# test/year	2
Subtotal Tests	2,920,000
Inservice work with test results	
Number of Teachers	10,200
1/3 of teachers/yr	3397
Cost/day	200
Presenter Costs	
\$1 per student	146,000
Subtotal Inservice	825,320
Other Expenses	
Tracking \$1/student	146,000
Total Assessment	3,891,320
Per Student	\$ 27

4.3 Development of assessment process in all program areas (Elem)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	4	1.2	1.6	1.6
	Deficient	47	14.2	19.1	20.7
	Adequate	101	30.4	41.1	61.8
	Good	67	20.2	27.2	89
	Exceptional	27	8.1	11	100
	Total	246	74.1	100	

4.3 Development of assessment process in all program areas (JR)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	traditionally poor	6	1.8	3.4	3.4
	declining quality	35	10.5	19.8	23.2
	improving quality	81	24.4	45.8	68.9
	maint high quality	47	14.2	26.6	95.5
	traditionally excellent	8	2.4	4.5	100
	Total	177	53.3	100	

4.3 Development of assessment process in all program areas (HS)

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Poor	4	1.2	2.9
	Deficient	32	9.6	23.5
	Adequate	63	19	46.3
	Good	27	8.1	92.6
	Exceptional	10	3	100
	Total	136	41	100

Component Eight

Preservation of Local Control

Federal Programs

The first level of local control is at the state level. Local control at the state level is likely achieved by ignoring federal requirements, which would likely mean the loss of federal funds. The title funds alone account for the following revenue:

Federal Programs		
2002-2003		
ESEA	Title I	39,444,227
ESEA	Title II	16,713,597
ESEA	Title III	500,000
ESEA	Title IV	3,830,869
ESEA	Title V	1,911,525
ESEA	Title VI	4,171,612
ESEA	Title VIII	38,000,000
ESEA	Title X	164,170
Total		104,736,000

Local Control

The cost of local control ultimately will depend upon some philosophical decisions made by the Legislature. Some of these decisions include:

- What is the relationship between control and funding? That is, ...does the state pay for what it requires and the local district pay for its own requirements?
- A related consideration...does the state or the local district bear the cost of the federal government failing to fund all or part of federal mandates that have been adopted and required at the state level?
- Another related question is whether the state will fund facilities and therefore control which facilities are built or refurbished or give control of facilities to the local school board, and therefore the cost of funding those facilities.

10.6 Local augmentation of the budget should be capped?

- -Yes, definitely. Otherwise, the opportunity statewide would not be equal. 20% local - 80% state.
- A cap is necessity to maintain equity of opportunity and comply with the Loble decision in the under-funded lawsuit. The state is flirting with violating that decision at the current time.
- I am not certain. If we cap a local budget do we eliminate local control and if we remove caps do we eliminate equalization?

(selected comments from Needs Assessment)

10.6 Local augmentation of the budget should not be capped?

- Absolutely not! If the State is providing the constitutionally mandated education, then local districts should be able to provide what they feel is necessary and desirable for their local constituents.
- Anytime you have a cap, kids get hurt. Money is not everything. It can only help you get the staff to join a district and stay, which in turn builds programs. This is a hard question to answer.
- Absolutely not. Before "equalization" when we needed the taxpayers, they stepped up to support the district. Our people believe in their small rural district, keeping their school keeps their community centered and they avidly believe in our rural way of life.

(Selected from 10.6 Needs Assessment responses)

Concluding Recommendations Statistical Analysis and Needs Assessment

Summary of Additional Funding Necessary to Meet Minimum Standards under SB152

1 Accreditation Standards		
2 Special Education/Needs At Risk		
Achievement Gap	5,100,000	Initial funding to determine 2007 funding
G&T	50,000	Initial funding to determine 2007 funding
3 Indian Education for All 16,095,570 Initial + some annual		
4 Attract/Hire/Retain Qual Teachers		
CPI Index applied to General Fund 3%	\$\$\$	Young/Stoddard Study Annual 23,024,754
1% Salary Schedule/Health Insurance		Annual 7,674,918
5 Facilities 2,000,000 Initial funding to determine 2007 funding		
6 Transportation 7,223,455 Annual		
7 Assessment 3,891,320 Annual		
8 Local Control		
Total (plus Young/Stoddard Factor)		65,060,017

Concluding Recommendations Statistical Analysis and Needs Assessment

Summary of Recommendations as per SB152

1 Accreditation Standards	
Administrators	
District Admin	Buffer standards by 4 FTE and proportion funding below that
School Admin	Buffer standards by 4 FTE and proportion funding below that
Curric Coordinator	Fund part time positions below 100 FTE
Guidance	Fund more Guidance
Media/Librarian	Fund more Media/Librarian
Teachers	Buffer class size standards by 4 students
Professional Development	Retain the \$10,000,000 presently funded by ANB funding for PD
2 Special Education/Needs Special Education	
Fund SPED and Special Needs without competing for regular education funding. Provide fund appropriate supervisory standards for SPED teachers and compute minimum number required vs FTE. Presently 907 SPED teachers.	
At Risk	
Achievement Gap	Provide necessary support and funding to see this challenge resolved
G&T	Provide support and funding to assist districts in developing G&T
3 Indian Education for All	
Commit support and funding to meet the needs of this component of MT education	
4 Attract/Hire/Retain Qual Teachers	
5 Facilities	
Fund a comprehensive study to assess school facilities and determine a way for these facilities to be maintained consistent with accreditation standards.	
6 Transportation	
7 Assessment	
Fund the assessment costs and the necessary support to utilize the assessments as required in the accreditation standards	
8 Local Control	

Recommendations Accreditation Standard

✓ The legislative committee may want to work with the excellent statistical properties between enrollment and the **number of the teachers** required to define the number of teachers necessary to meet state accreditation standards. This could be done by computing the predicted number for each school district and have each district determine if those FTE numbers would have provided for meeting class size accreditations standards and if not, explain where deficiencies would exist. These deficiencies could be factored into the formulas and the state would have for all future purposes such as funding, litigation, etc., a very easy way to document whether or not the state is meeting its obligation regarding FTE, thus removing the need for future studies and expenses in repeating this kind of analysis.