MEMO TO: Montana College!NOW State Team  
FROM: Dr. J. Anne Clark, President, Collaborative Research Associates (CRA)  
College!NOW Evaluator  
DATE: August 3, 2012  
RE: Progress on the College!NOW Five Strategies, April through July 2012

This memo provides an update to the April 2011 comprehensive evaluation report, College!NOW Five Strategies: Progress through February 2011 and Potential Next Steps through February 2012 and the May 22, 2012 College!NOW Evaluation Memo #3.

THE COLLEGE!NOW FIVE STRATEGIES AND SUBSTRATEGIES

The College!NOW Five Strategies and their twenty-four substrategies are listed below for reference when reviewing the policy phase chart on page 2, which illustrates specific progress achieved on the substrategies during the April 2012 through July 2012 time period.

Strategy One: Comprehensive two-year education mission (8 substrategies)
   a. Comprehensive two-year education mission at all COTs
   b. ABLE at all COTs
   c. Developmental education at all COTs
   d. Workforce education at all COTs
   e. Transfer core at all COTs
   f. Faculty and staff development opportunities are provided
   g. Gallatin and Bitterroot College Programs progress toward the comprehensive mission
   h. Tribal Colleges utilize College!Now as a strengthening resource

Strategy Two: Regional clearinghouse hubs for two-year college education (3 substrategies)
   a. Workforce education that is responsive to business / industry
   b. Supports for transition from high school to college / dual enrollment
   c. Adult friendly programming / scheduling

Strategy Three: Coordinated curricula and integrated technology (5 substrategies)
   a. ^Related instruction aligned
   b. Transfer core streamlined
   c. Banner at MCC and DCC
   d. Common data standards and approaches used throughout MUS system
   e. ^Coordinated statewide online education broadens student access

Strategy Four: Performance-based funding (3 substrategies)
   a. ^Performance funding model is developed and implemented
   b. ^Two-year college performance metrics are developed and implemented
   c. ^Four-year college performance metrics are developed and implemented

Strategy Five: Communication and engagement (5 substrategies)
   a. Citizen awareness of two-year education as affordable and effective
   b. Business / industry are engagement with the two-year education sector
   c. Policy maker support the two-year education sector
   d. Positive perceptions of two-year college education
   e. High interest in two-year college education
The Policy Phase Chart

The purpose of the chart below is to depict the incremental progress of each College!NOW strategy and sub-strategy from its inception to sustainment, using a ten-phase policy process model. A full explanation of this model is presented in the April 2011 comprehensive College!NOW evaluation report.

Progress in the chart from Phase I through Phase X is determined by documenting significant actions/events related to each of the twenty-four sub-strategies and placing these actions/events within one of the ten policy phases. Over time, these significant actions/events cumulatively indicate that the next phase in the model has been attained. For the April through 2012 time period, thirty-one significant actions/events were documented.

Blue arrows in the chart depict progress through the policy process phases for each sub-strategy during the 12-month time period from July 2011 to July 2012. Tan shading with a symbol indicates policy process phases completed prior to July 2011.

<table>
<thead>
<tr>
<th>STRATEGY ONE</th>
<th>STRATEGY TWO</th>
<th>STRATEGY THREE</th>
<th>STRATEGY FOUR</th>
<th>STRATEGY FIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Policy Process Phase</strong></td>
<td><strong>a</strong></td>
<td><strong>b</strong></td>
<td><strong>c</strong></td>
<td><strong>d</strong></td>
</tr>
<tr>
<td>X. Sustain</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>IX. Evaluate</td>
<td></td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>VIII. Implement</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
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<tr>
<td>VII. Pre-Implement</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VI. Adopt solution</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>V. Select Solution</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>IV. Review Alternatives</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>III. Set Criteria</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>II. Define problem</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>I. Set agenda</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

COLOR AND SYMBOL KEY

Policy process phase targeted for completion by October 31, 2012

X Policy process phase completed between April and July 2012

Policy process phase completed during the 12-month period from July 2011 to July 2012

Policy process phase completed by July 2011

* Significant actions/events occurred during the April to July 2012 time period, although the phase was not completed

**Strategy One (a, g)**
The Board of Regents approved development of strategic legislative initiatives to support workforce development, two-year education, and student financial aid / services.

**Strategy One (a, g)**
The Board of Regents reviewed a long-range building program in which capital projects at 2 two-year colleges / programs ranked among the 5 top priority projects.
<table>
<thead>
<tr>
<th>Strategy One [a, g]</th>
<th><strong>CIN Task Force for Extending the Comprehensive Mission and Rebranding of Two-Year Colleges</strong> convened a one-day session with Montana’s two-year education leaders for discussion and planning of next steps.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CIN is funding a six-month consulting contract with <strong>College Brain Trust</strong> for technical assistance to the two-year institutions regarding their mission expansion plans as well as the statewide two-year education plan and brand. CBT work will also support development of metrics to assess CIN progress.</td>
</tr>
<tr>
<td>Strategy One [a, g]; Strategy Five [a, d, e]</td>
<td><strong>CIN ABLE/Developmental Education Subcommittee</strong> met to review the subcommittee workplan and discuss action items including: (1) tracking of ABLE students into postsecondary education indicates that close partnerships between ABLE programs and two-year colleges support successful student transitions; (2) a PowerPoint is available for presenters that informs audiences about the critical need for adult basic education; and (3) a task force might be established to study the possibilities for relocating Montana’s ABLE program from OPI to OCHE.</td>
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<td></td>
<td>CIN provided professional development for 70 participants through a <strong>Conference on Serving the Underprepared Student</strong> featuring an expert presenter from Education Commission of the States and including presentations / discussions on course redesign; ABLE / Developmental education models; math education reform; and best practices.</td>
</tr>
<tr>
<td>Strategy One [b, c]</td>
<td>Representatives from four Tribal Colleges and a number of ABLE programs across the state participated in the <strong>CIN Conference on Serving the Underprepared Student.</strong></td>
</tr>
<tr>
<td>Strategy One [b, c, f]</td>
<td><strong>CIN ABLE/Developmental Education Subcommittee</strong> is planning to obtain feedback from the two-year colleges in Billings, Missoula, and Helena on successes and challenges in their use of the Emporium Model for developmental math instruction. The Subcommittee is developing an inventory of developmental math approaches on MT campuses, including assessment methods and instructional software.</td>
</tr>
<tr>
<td>Strategy One [b, h]</td>
<td>At least one Montana Tribal College submitted a TAACCCT grant proposal in the individual institution category.</td>
</tr>
<tr>
<td>Strategy Two [a]; Strategy One [d]</td>
<td><strong>The Consortium for Workforce Training Solutions,</strong> comprised of 13 MT two-year colleges/programs, is discussing ways to provide training and stackable certificates to prepare the large number of employees that are needed by the mining industry and related industries in Eastern Montana, now and over the next 10 to 15 years.</td>
</tr>
<tr>
<td>Strategy Two [a]; Strategy One [d]</td>
<td><strong>The Statewide Workforce Development Task Force</strong> discussed with the <strong>BOR Two-Year Education Committee</strong> the acute need for employee training and education in the Eastern Montana oil field region. This need presents opportunities for two-year colleges in the region, including the 3 Tribal Colleges, to address business / industry training and education needs. The Taskforce gave the Board of Regents a list of relevant non-credit training courses currently offered online and on Montana campuses.</td>
</tr>
<tr>
<td>Strategy Two [b]; Strategy One [h]</td>
<td>OCHE reorganized two <strong>Deputy Commissioner Divisions</strong> by moving oversight of all statewide federal access and success programs under supervision of the Deputy Commissioner for Two Year and Community College Education. The purpose is to create greater synergy /communication as well as collaborations with Tribal Colleges and K-12.</td>
</tr>
<tr>
<td>Strategy Two [b]</td>
<td>CIN covered expenses for representatives from two-year colleges / programs to attend the <strong>National Career Clusters Conference</strong> in D.C.</td>
</tr>
<tr>
<td>Strategy Two [b]; Strategy One [e]; Strategy Three [e]</td>
<td>MTDA requested that each two-year college that provides online dual enrollment courses set up a specific website landing page; FVCC has such a page. For summer/fall 2012, 97 online dual enrollment courses are available, up from 60 courses the previous term. Going forward, deadlines may be earlier for colleges to submit lists of courses they will offer. Qualifications for dual enrollment instructors were clarified.</td>
</tr>
<tr>
<td>Strategy Two [c]</td>
<td>All MT public higher education institutions with two-year programs are administering the CAEL Adult Learning Focused Institution (ALFI) Assessment. At an onsite meeting, CAEL presented overall MT ALFI results for 10 institutions and led discussion of strategies to engage, retain, and graduate adult learners. CAEL offered to discuss college-level results with individual colleges by telephone.</td>
</tr>
<tr>
<td>Strategy Three [b]; Strategy One [e]</td>
<td>The MUS General Education Core may now be transferred from two-year colleges as a block of courses that satisfies general education requirements at all MT four-year universities. The Choices That Count advising/planning tool is used by students and advisors to identify which general education courses are required for which baccalaureate program majors.</td>
</tr>
<tr>
<td>Strategy Three [c]</td>
<td>The Banner information system has been fully implemented at Miles and Dawson Community Colleges and operates through the University of Montana Missoula campus information infrastructure. Continuous informal monitoring and evaluation processes identify any needed adjustments to the system. Data from Flathead Valley Community College is periodically shared and coordinated through the existing FVCC information system.</td>
</tr>
<tr>
<td>Strategy Three [d]</td>
<td>Data standardization throughout the MUS information system continues as an ongoing process. As part of its 2012 strategic plan, the Board of Regents is working with the Governor’s Office on developing a legislative initiative to support ongoing progress toward an integrated MUS information system.</td>
</tr>
<tr>
<td>Strategy Three [d, e]</td>
<td>During a 2-day site visit to Montana, Kevin Corcoran from Lumina discussed the OCHE/BOR/MUS goal to implement a single statewide information system that will serve all two-year and four-year institutions. Such a system would be phased in over a 5-year period, and would provide efficiencies in registration, course sharing, online education, and student records.</td>
</tr>
<tr>
<td>Strategy Four [a, b, c]</td>
<td>During a 2-day site visit to Montana, Kevin Corcoran from Lumina offered to make resources available to assist CIN with next steps toward performance funding. OCHE convened teleconference meetings with each COT and two-year program to discuss their processes for obtaining campus input on renaming.</td>
</tr>
<tr>
<td>Strategy Five [a]</td>
<td>The Board of Regents announced approval of new names for the 5 Colleges of Technology and 2-Year College Programs.</td>
</tr>
<tr>
<td>Strategy Five [a, d, e]</td>
<td>CIN convened meetings to plan rollout of the two-year colleges’ new names. The Helena College University of Montana name was rolled out through press releases and the college’s website. Local task forces with members from various stakeholder groups are being formed by Aug. 2012 at the renamed two-year colleges and programs. Task forces will plan roll out by summer 2012 of their new names, logos, and brands that will better represent the comprehensive two-year college mission.</td>
</tr>
<tr>
<td>Strategy Five [a, d, e]</td>
<td>A process was established for design and approval of new two-year college logos. Assistance is available from CIN communications consultant, Strategies 360.</td>
</tr>
</tbody>
</table>
Strategy Five [a through e]  Media coverage and editorials are explaining reasons for renaming and rebranding two-year institutions and outlining the process. OCHE is coordinating with the Governor’s Office to plan for changes to directional road signage near the institutions.

Strategy Five [a through e]  C!N Extending the Comprehensive Mission Taskforce is discussing creation of a statewide two-year education brand and ways to promote it across Montana, including an OCHE portal where Montanan’s can learn about two-year and all higher education opportunities in their own communities and across the state.

Strategy Five [c]  During a 2-day site visit to Montana, Kevin Corcoran from Lumina met with several key Montana state legislators to discuss the upcoming session as related to higher education.

Strategy Five [b]  CIN leaders are making presentations to workforce groups including Montana Health Care Workers, AFL-CIO, SWIB, and others to discuss two-year education and business / industry workforce needs.

Strategy Five [c]  OCHE Commissioner and Cabinet discussed higher education with the two strongest candidates running for Governor in the upcoming Montana fall election.

Strategy Five [c]  Work of the College Brain Trust consultants with CIN and two-year institutions will be useful in BOR development of a funding initiative to be sent to the Governor’s office and the legislature’s ELG Committee for funding two-year education mission expansion.

SUMMARY OF APRIL TO JULY 2012 PROGRESS DEPICTED IN POLICY PHASE CHART (on page 2)

Seventy-nine percent of the College!NOW substrategies progressed through at least one additional phase in the policy phase model between April and July 2012. For the remaining twenty-one percent of the substrategies, actions/events did not indicate sufficient progress to warrant movement into the next phase. (The five substrategies that did not advance to the next phase are indicated with a red asterisk in the list of strategies on page 1 and in red font at the top of the policy phase chart on page 2.)

Strategy One: Comprehensive two-year education mission (8 substrategies)

Very substantial progress was achieved on Strategy One between April and July 2012. Fourteen of the thirty-one significant actions/events that are documented in this memo are related to Strategy One. All of the substrategies progressed to the next phase, as shown in the chart on page 2.

Strategy Two: Regional clearinghouse hubs for two-year college education (3 substrategies)

Substantial progress was achieved on Strategy Two. Six of the thirty-one significant actions/events documented here are related to Strategy Two. All three substrategies progressed to the next phase, as shown in the chart on page 2.

Strategy Three: Coordinated curricula and integrated technology (5 substrategies)

Substantial progress was also achieved on Strategy Three. Six of the thirty-one significant actions/events documented here are related to Strategy Three. All of the substrategies progressed at least one phase. CRA found evidence not previously documented of actions / events that had occurred prior to the April to July 2012 time period. Based on this evidence, strategies [b] and [c] progressed more than one phase, as shown in the chart on page 2. Substrategy [c] has progressed to the final phase of the model, indicating that this C!N strategy has been accomplished and its implementation is currently being sustained.
**Strategy Four: Performance-based funding (3 substrategies)**

Although one significant action/event documented here relates to Strategy Four, progress was not sufficient to advance any of the three substrategies to the next phase.

**Strategy Five: Communication and engagement (5 substrategies)**

**Very substantial progress** was achieved on Strategy Five. Eleven of the thirty-one significant actions/events documented here are related to Strategy Five. All substrategies advanced at least one phase. Four of the five substrategies advanced one phase, and substrategy [a] advanced two phases, as shown in the chart on page 2.

**SUMMARY OF PROGRESS DOCUMENTED OVER THE PAST 12 MONTHS**

Progress for each College!NOW substrategy during the entire 12-month time period between July 2011 and July 2012 is shown in green shading on the Policy Phase Chart on page 2. The “starting phase” for the substrategies (as of July 2011) varied widely among the 24 substrategies. Some substrategies started the 12-month time period at Phase I, and several substrategies were already much farther along in July 2011, at Phase VII or Phase VIII. (Tan shading on the chart indicates progress prior to July 2011.)

**Strategy One: Comprehensive two-year education mission (8 substrategies)**

During the 12 months between July 2011 and July 2012, all 8 substrategies made progress. The greatest advancement was achieved on substrategy [a], *Comprehensive Mission at all COTs*, which moved from Phase II to Phase VII. The smallest advancement was achieved on substrategy [h], *Tribal Colleges Utilize C!N*, which advanced from Phase I to Phase III.

**Strategy Two: Regional clearinghouse hubs for two-year college education (3 substrategies)**

Between July 2011 and July 2012, all 3 substrategies made progress. The greatest advancement was achieved on substrategy [b], *Supports for Transition from High School to College / Dual Enrollment*, which moved from Phase IV to Phase VIII. The smallest advancement was achieved on substrategy [c], *Adult Friendly Programming / Scheduling*, which advanced from Phase II to Phase IV.

**Strategy Three: Coordinated curricula and integrated technology (5 substrategies)**

Between July 2011 and July 2012, all 5 substrategies made progress. The greatest advancement was achieved on substrategy [b], *Transfer Core Streamlined*, which moved from Phase V to Phase IX. Substrategy [c] was the first of the 24 College!NOW substrategies to achieve the culminating level in the model, Phase X—Sustainment. The smallest advancement was achieved on substrategy [d], *Common Data Standards and Approaches throughout MUS*, which advance from Phase VII to Phase VIII.

**Strategy Four: Performance-based funding (3 substrategies)**

Between July 2011 and July 2012, none of these 3 substrategies progressed.

**Strategy Five: Communication and engagement (5 substrategies)**

Between July 2011 and July 2012, all 5 substrategies advanced 2 or 3 phases from Phase III or IV to Phase V or VI.
EVALUATOR RECOMMENDATIONS BASED ON PROGRESS DOCUMENTED OVER THE PAST 12 MONTHS

Strategy One: Comprehensive two-year education mission (8 substrategies)

In order to advance Substrategy [h] into Phase IV, College!NOW could confer with Montana’s Tribal College leaders and other interested stakeholders to explore approaches and outline implementation scenarios for Tribal Colleges to Utilize C!N as a Strengthening Resource.

Strategy Two: Regional clearinghouse hubs for two-year college education (3 substrategies)

In order to advance Substrategy [c] into Phase V, College!NOW could confer with Montana’s two-year college leaders and other interested stakeholders to select solutions for Adult Friendly Programming and Scheduling.

Strategy Three: Coordinated curricula and integrated technology (5 substrategies)

As Strategy Three has advanced further through the policy phases of this model than the other strategies, no recommendations are suggested at this time.

Strategy Four: Performance-based funding (3 substrategies)

In order to advance Substrategies [b] and [c] into Phase III, College!NOW could confer with Montana’s two-year and four-year education leaders and other interested stakeholders to frame the relevant issues, formulate generalized goals, and establish criteria for Two-Year College Performance Metrics and Four-Year College Metrics.

Strategy Five: Communication and engagement (5 substrategies)

In order to advance Substrategy [b] into Phase VI, College!NOW could confer with Montana’s two-year and four-year education leaders and interested business and industry stakeholders to select, adopt, and communication solutions for Engaging Business and Industry Support.

EVALUATOR CONTACT INFORMATION

Documentation of significant actions/events continues, and another evaluation memo will report on this progress in November 2012. Please contact Dr. Anne Clark (anne@cr-assoc.com) with any comments or suggestions regarding evaluation reports and memos or documentation of College!NOW actions /events.