

**The Carl D. Perkins
Career and Technical Education Act of 2006**

STATE PLAN COVER PAGE

State Name: Montana

Eligible Agency Submitting Plan on Behalf of State:

Montana Board of Regents, Commissioner of Higher Education

**Person at, or representing, the eligible agency responsible for answering
questions on this plan:**

Signature: _____  _____

Name: Arlene Parisot

Position: Director

Workforce Development and Two-Year Education

Office of the Commissioner of Higher Education

Telephone: 406-444-0316

Email: aparisot@oche.montana.edu

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Unified - Postsecondary Only

Title I only (*All Title II funds have been consolidated under Title I*)

Title I and Title II

**MONTANA STATE PLAN FOR
CAREER AND TECHNICAL EDUCATION:
FY 2008-2012**



Prepared in Accordance with the Provisions of
The Carl D. Perkins Career and Technical Education Improvement
Act of 2006

MONTANA BOARD OF REGENTS
OFFICE OF COMMISSIONER OF HIGHER EDUCATION

MONTANA MULTI-YEAR STATE PLAN 2008-12

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Introduction

The Montana Board of Regents' strategic plan for 2006-2010 points out the changing skill needs for economic success in the 21st century. "What has changed (over the 100 years since Montana gained statehood) is the minimum level of education necessary to successfully participate in our society and economy. Postsecondary education has long been a gateway to success for our best and brightest and more privileged citizens. Now it is essentially a requirement for almost everyone. Many years ago, an eighth grade education was recognized as sufficient for most citizens. This gave way to a standard that a high school diploma was necessary for entrance to the middle-class and the chance to have a comfortable life. In the 21st Century, *the hurdle has plainly moved to where at least some postsecondary education is now necessary for even modest prosperity in any high-wage, industrialized economy.*"

In this context, the State of Montana begins implementation of the Carl D. Perkins Career and Technical Education Improvement Act of 2006. Through the resources made available from this Act, and the state and local funding for career and technical education that is leveraged through the federal funds, the State is moving forward to update career and technical education services and provide more options for students wishing to pursue postsecondary studies.

Now, Montana will create even closer links between secondary and postsecondary education and training through a new program known as "Big Sky Pathways (BSP)." These programs, with clear plans of study that integrate rigorous academic courses with relevant curriculum, will help students explore career fields during high school, complete high school, and if they choose to do so, make a smooth transition into postsecondary studies in that area of study.

At the high school level, CTE programs support challenging academic standards and college readiness as well as an introduction to career fields through career pathways. These CTE programs produce graduates who are ready for both college-level studies and direct entry into the high-skill, high-wage or high-demand careers.

At the technical college level, CTE programs help young adults who are preparing for first-time careers and adults who are changing careers or upskilling within a career field to quickly gain the skills and experiences that are directly related to workplace success. Effective CTE programs at the two-year postsecondary institutions are characterized by their close relationship to employers and smooth transitions of program participants into the workforce at higher levels of income and employment success.

Under this new plan, over time many of the State's Career and Technical Education offerings will be merged into Big Sky Pathways that connect to Montana's Two-year postsecondary institutions and also its state university programs. In addition, during implementation of the new Perkins Act, all CTE programs (at the high school and postsecondary levels) will benefit from upgraded curriculum, high quality technology, and ongoing training to help CTE teachers demonstrate excellence in their knowledge of current industry standards and good teaching practices.

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Tech Prep will be shifted from a regional service area approach to having a single Tech Prep consortium with statewide activities around six broad career fields. Members of the consortium will focus on developing model programs of study (known as *Big Sky Pathways*) that will be adopted by partners in the consortium, and will also be available for use by other school districts and two-year postsecondary institutions within Montana.

In implementation of the new Perkins Act, the Montana Office of the Commission of Higher Education (the eligible agency) and the Montana Office of Public Instruction are collaborating on program development and oversight to a higher level than ever before. The agencies are creating a joint leadership structure (“**the State CTE Executive Leadership Team**”) to provide ongoing review of state activities and progress in improving CTE programs, making key decisions about the allocations of “reserve funds” under section 112, leadership funds under section 124, and managing the Tech Prep consortia activities, Title II. This joint leadership structure will be informed by the ongoing involvement of a newly formed **State CTE Advisory Committee** (See Leadership Chart and Narrative in Appendix #3).

In submitting this plan, Montana wants to gratefully acknowledge the participation of input of the **State Plan Advisory Committee**, appointed in conformity with the requirements of Montana Law (MCA 20-7-330). Members of the State Plan Advisory Committee are: Jane Baker, Dean, Montana Tech of the University of Montana, in Butte; Mark Branger, Executive Director, Montana Association for Career and Technical Education and CTE Teacher/Administrator, Huntley Project School; Theresa Busch, Local Applications Project Manager, Montana State University of Great Falls; Cheryl Graham, CTE Teacher, Bainville High School; Connie Roope, Training Director, Career Training Institute in Helena; and, Cleo Sutton, Montana BILT Project Manager, MSU-Billings.

The following plan explains how the Office of the Commissioner of Higher Education and the Office of Public Instruction will work together with the State’s eligible recipients to carry out these objectives.

I. PLANNING, COORDINATION AND COLLABORATION PRIOR TO PLAN SUBMISSION

1.1 Public Hearings

The Montana Office of the Commissioner of Higher Education and the Office of Public Instruction jointly conducted two public hearings for the purpose of affording all segments of the public and interested organizations and groups an opportunity to present their views and make recommendations regarding the State plan. Because of the long distances for travel to public meetings in Montana (sometimes several hundred miles), to allow widespread participation in the hearing process, the formal public hearings were conducted via video teleconference.

The video teleconferences originated in Helena, directed by the Office of Commissioner of Higher Education—State Director for Workforce Development, and Office of Public Instruction Division Administrator for Career and Technical Education. Seven other sites were involved in the events. Three sites were in the largest population centers in the state: Billings in the South Central part of Montana; Great Falls in the North Central part of Montana, and Missoula in the Western part of the state. Other teleconference sites included Miles City, in the far Eastern part of the state; Havre in the North Central; Bozeman, in the South West; and Kalispell in the Northwest. These hearing sites were linked via satellite teleconferencing to enable participants in each location to hear views and recommendations presented in other locations. The public hearings began with a detailed briefing of all aspects of the State plan, and then participants were allowed to present oral statements, and to present written statements as well. The hearing record was kept open to 10 additional working days to allow for the submission of written comments.

A public hearing log, copy of the hearing notice, mailing lists used for notification and a summary of recommendations and comments made by attendees are maintained on file at the eligible agency.

Day/Date	Time	Locations
Wed, Jan 16, 2008	9:00 a.m.- 12:00	Butte, Kalispell, Havre and Miles City
Wed, Jan 16, 2008	1:00 p.m.- 4:00 pm	Billings, Butte, Great Falls, Kalispell, Havre, Missoula, and Miles City

1.2 Summary of public comments

A summary of recommendations and the eligible agency's responses are included as appendices.

1.3 Consultation with Key Stakeholders

The Montana Six-Year Perkins State Plan was developed in consultation with teachers, eligible recipients, parents, students, interested community members, representatives of special populations, representatives of business and industry, and representatives of labor organizations in the State.

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The work of preparing the Perkins State Plan was also assisted by **State Plan Advisory Committee**, appointed in conformity with the requirements of Montana Law (MCA 20-7-330.) The Advisory Committee met with the Joint leadership team from OCHE and OPI on (five) occasions during development of the Transition Plan and the Multi-Year Plan in 2007.

The meeting dates of the Advisory Committee were:

January 24-25, 2007

March 9, 2007

March 28, 2007

October 16, 2007

December 18, 2007

February 21, 2008

By statute, the Advisory Committee consists of two representatives of secondary education (both high school career and technical educators); two representatives of postsecondary education (one a Perkins Project Director and the other a Dean of a College of Technology); and one representative from a Community Based Organization or a business/employer.

Recommendations of the Advisory Committee include development of career pathways, accountability, the structure of Tech Prep, and the use of reserve funds and state leadership funds. All meetings of the task force have been announced well in advance, both electronically and in print, and all meetings have been open to the public.

Postsecondary career and technical education programs assisted under Perkins IV continue to coordinate services with the State Workforce Investment Board and other one-stop career delivery system partners.

On October 17, 2007, the leadership of OCHE met with the Two-Year Education Council in Bozeman, informing them about the provisions in the proposed Multi-Year Plan and requesting their input. On October 18 and 19, 2007, also in Bozeman, the leadership of OPI and OCHE solicited the involvement of CTE educators in the state at the Fall conference of the Montana Association of Career and Technical Education.

On January 10, 2008 the Director of Workforce Development and Two-Year Education (OCHE) and the Division Administrator for Career and Technical Education (OPI) met with the Montana Workforce investment Board to present details about the proposed State Perkins plan.

On February 21, 2008 the public hearing oral and written comments, recommendations and responses and changes to the State Plan were reviewed by the State Plan Advisory Committee revised as necessary, and placed on the OCHE Workforce Development Website for public view.

On March 6, 2008, the Montana Board of Regents approved the final Six-Year State Plan for implementation of the Carl D. Perkins Career and Technical Education Act of 2006.

1.4 Access to State and Local Decisions

In accordance with Section 122(b)(2) of Perkins IV, Montana developed activities and procedures, including access to information needed to use such procedures, to allow stakeholders to participate in State and local decisions that relate to development of the State plan. Planning meetings and a public hearing were announced electronically and in print. Sharing of stakeholder mailing lists also helps ensure that all individuals described in the previous section have full information to participate in decisions that relate to development of the State plan.

All meetings of groups associated with developing Montana's State plan, including the State Plan Advisory Committee were open to the public. The dates, times, and places of these meetings were made public and were posted on METNET, the state's interactive website, bulletin board, and e-mail service for educators. METNET access was made available to stakeholders through all local public schools.

1.5 Input from Relevant Agencies

The Montana Board of Regents of Higher Education is the Perkins eligible agency for the State of Montana. The Office of the Commissioner of Higher Education is the administrative agency for the Board of Regents and, therefore, for the Perkins grant in the State of Montana. OCHE is also the State agency responsible for supervision of community colleges, technical institutes, or other two-year postsecondary institutions primarily engaged in providing post secondary career and technical education. The Montana Office of Public Instruction is the State agency responsible for secondary education. These two agencies have jointly written the Perkins State plan and, with the State Plan Advisory Committee, developed the portion of the plan relating to the amount and uses of any funds proposed for postsecondary career and technical education, tech prep education, nontraditional and special populations, students in institutions and secondary career and technical education.

If a State agency finds that a portion of the final State plan is objectionable, the State agency shall file its objection with the Office of the Commissioner of Higher Education.

II. PROGRAM ADMINISTRATION

2.1 Preparation of the Multi-Year Plan

The Montana Board of Regents of Higher Education (Board of Regents) is the designated state board to coordinate the development and submission of the state plan for career and technical education as required by the Carl D. Perkins Career and Technical Education Improvement Act of 2006 (Perkins IV).

The State agencies responsible for career and technical education in Montana are the Workforce Development Unit of the Office of the Commissioner of Higher Education (OCHE) and the Division of Career, Technical and Adult Education of the Office of Public Instruction (OPI).

The Board of Regents, therefore, submits this Six-Year Montana State Plan for Career and Technical Education under provisions of Perkins IV covering the period of state fiscal years 2008-2012. On behalf of the Board of Regents, OCHE will annually review the state's implementation of the state plan as reflected in the annual performance reports submitted by local recipients, including an assessment of the state's aggregate achievement of the adjusted levels of performance for its core indicators.

In some elements of this plan, when OCHE and OPI take separate actions with the eligible recipients they serve, their activities will be noted separately. However, when the two agencies take action together for fulfilling various requirements, such as in implementation of the CTE Programs of Study, they will be referred to as "the Partner Agencies."

2.2 CTE Activities Supported through the Perkins Act Funding

CTE Activities supported through Federal Perkins Act funding are described in sections 2.2.1 through 2.2.12 below.

2.2.1 CTE Programs

The Partner Agencies are collaboratively developing career and technical programs of study aligned with Montana-specific program concentration areas.

The programs of study have been named *Big Sky Pathways*, and incorporate secondary education and postsecondary education elements including coherent and rigorous content aligned and integrated with challenging academic performance standards and relevant career and technical content in a coordinated, non-duplicative progression of courses that align secondary education with postsecondary education to adequately prepare students to succeed in high-demand, high-skill, or high-wage occupations and in related advanced education.

Building upon and adapting the work of the States' Career Clusters initiative, the Partner Agencies will both adopt the Montana Career Clusters framework (using 6 Career Fields, 16 Clusters, and 81 Pathways (#8 Career Clusters Model).

"Career clusters" is the term for a new organizational tool for designing educational programs that link between secondary, postsecondary education, and the workforce. Clusters are designed

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to encompass three levels of knowledge and skills: the foundation, pathway and specialty level. At the foundation level, knowledge and skills cut across all pathways encompassed in the cluster. Similarly, at the pathway level, the knowledge and skill statements cover all of the specific occupations contained within the pathway. The *State's Career Clusters Initiative* (www.careerclusters.org), in partnership with the *College and Career Transitions Initiative* (www.league.org/ccti), have created sample plans of high school and postsecondary study for the 81 career pathways identified through the Career Clusters organizational model. What the Perkins Act described as "CTE Programs of Study" is very close to what are called Career Pathways in the Clusters model.

Hence, Montana is referring to its CTE "programs of study" as "*Big Sky Pathways (BSPs)*." While Montana will not design BSPs for all the 81 identified career pathway options, for the BSPs that are developed within a Cluster, they will cover the Foundation knowledge and skills appropriate to that Cluster. Each BSP will include pathway specific knowledge and skills taught at the secondary level, and will also include occupational specialties taught in postsecondary courses offered by two-year postsecondary institutions and by baccalaureate granting institutions. The occupational specialties within a BSP (job-specific skills and knowledge appropriate for specific job preparation) will be primarily taught at the postsecondary level.

The initial set of BSPs will be identified and will be made available to Local Education Agencies (school districts) and postsecondary institutions. Beginning with the program year 2007-2008, each LEA and postsecondary institution that is a recipient of Perkins funding will begin planning for implementation of at least one program of study as an option to students (and their parents as appropriate) when planning for and completing their future coursework for career and technical content areas.

Each BSP can be customized so it is most relevant to the local job market. Each BSP indicates CTE and Academic Courses (and possible electives) that are offered to the student.

The State is pursuing a statewide policy for dual enrollment opportunities for secondary students. In Montana, dual enrollment is defined as "Dual Credit," whereby a student receives both high school and college credit for the course, and "College Credit-Only," in which the student receives college credit, but does not receive high school credit for the course. Opportunities are also available for students to participate in College Board Advanced Placement programs and early college or aligned/articulated coursework.

Through the work of the redesigned Tech Prep program, known as the Big Sky Pathways Consortium, model articulation agreements and state-wide articulation agreements will be developed. These agreements will allow for transition from high school to two-year postsecondary institutions, and where appropriate, to four-year institutions.

Each BSP will indicate courses that are eligible for advance college credit. These will include both CTE courses and academic courses. Some BSPs will include courses using model articulation agreements, and/or Advanced Placement courses that can earn college level credit, depending on the college's standards for AP test scores (two-year postsecondary institutions will need to identify in advance what their standards are for AP credit). Other BSPs will include coursework that is articulated so it leads directly into a registered apprenticeship program.

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Each Big Sky Pathway will indicate one or more postsecondary level credentials, certificates, or degrees which are available.

OPI, in consultation with the Big Sky Pathways Consortium, will launch a curriculum crosswalk process whereby CTE teachers will be engaged to identify state academic standards that are appropriate to be integrated into each BSP and each CTE course. The academic standards will be identified on a course-by-course basis so teachers know exactly what integration is appropriate. OPI will direct this effort, including CTE teachers in Montana and drawing upon other national resources and models, to provide sample instructional resources to assist in academic integration.

In addition, for each BSP, core technical skills and competencies (based on industry skills standards where available) will be identified. This more specific set of technical skills will be the foundation for a Montana's technical skill assessment system.

2.2.2. Consultation with Eligible Recipients

The development of the *Big Sky Pathways* builds on previous work funded through previous State Leadership resources and WIA Incentive Grants. The grantee will work closely with the Partner Agencies to coordinate development of *Big Sky Pathways* within the Career Fields/Clusters.

The State may use leadership funds and/or reserve funds to carry out additional development and implementation activities relating to BSPs, in coordination with the Big Sky Pathways Consortium.

The state will establish BSP Advisory Groups consisting of secondary, postsecondary and business partners, as well as other state agencies and community organizations related to workforce development, as appropriate. Leaders from each of the BSP Advisory Groups will serve as a resource to the state CTE Advisory Committee.

2.2.3. Support for eligible recipients Articulation Agreements

As previously noted, working through the Big Sky Pathways Consortium, Montana will develop one or more model statewide articulation agreements for each of the Big Sky Pathways. The state will develop a model for standardizing curriculum in CTE programs to allow for easier articulation and transfer among two-year postsecondary institutions.

As Big Sky Pathways are being developed, the articulation agreements already in effect throughout the state will be identified. The Partner Agencies will work with the coordinators of the Big Sky Pathways Consortium to review and update all existing articulation agreements. Subsequent articulation agreements will be statewide in scope and reflect the BSPs evolving within the state's selected career fields.

2.2.4. Availability of Programs of Study Information

As they are developed, the Partner Agencies will place information about *Big Sky Pathways* on their respective websites, and may create a joint website to give more visibility to the effort. The

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State will take advantage of the model pathways and materials developed by the *States' Career Clusters Initiative* in order to make efficient use of time and resources.

The Partner Agencies are considering creating a statewide listing of BSPs offered at all two-year postsecondary institutions and secondary schools throughout the state, and creating an informational guide that explains overview of the Career Field-Cluster system and the *Big Sky Pathways*. Additional printed materials may be made available to students and schools throughout the state, depending on the availability of resources.

The Partner Agencies will provide professional development opportunities for school administrators, teachers, counselors, workforce system professionals, and community advocates, so they understand the Career Fields and Clusters organizational approach, and what *Big Sky Pathways* students can use in creating a high school/college and career plan. Montana does not currently require the development of a high school/college and career plan for all high school students, but the **State CTE Executive Leadership Team** (OCHE and OPI) plans to provide model resources for use by districts that choose to implement such a requirement.

2.2.5 Secondary and Postsecondary CTE Programs

Montana provides a comprehensive array of CTE programs, services, and activities, made possible through a combination of local, state, and federal funds. The primary purpose for the expenditure of federal CTE technical funds is to support the improvement of quality, state-of-the-art CTE programs and services that meet the needs of youth and adults in preparing them for further education and for employment in careers that are personally satisfying and economically rewarding.

Programs to be carried out will conform to the specifications of Perkins IV and the federal definition of career and technical education:

“(5) CAREER AND TECHNICAL EDUCATION.—The term ‘career and technical education’ means organized educational activities that—

“(A) offer a sequence of courses that—

“(i) provides individuals with coherent and rigorous content aligned with challenging academic standards and relevant technical knowledge and skills needed to prepare for further education and careers in current or emerging professions;

“(ii) provides technical skill proficiency, an industry-recognized credential, a certificate, or an associate degree; and

“(iii) may include prerequisite courses (other than a remedial course) that meet the requirements of this subparagraph; and

“(B) include competency-based applied learning that contributes to the academic knowledge, higher-order reasoning and problem-solving skills, work attitudes, general employability skills, technical skills, and occupation-specific skills, and knowledge of all aspects of an industry, including entrepreneurship, of an individual.”

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Programs Offered

Secondary

Montana has a total of 439 school districts, with 173 high schools. 168 of these schools currently receive Perkins funding.

Montana's secondary CTE programs are currently organized around the following areas: Agricultural Education, Business & Marketing Education, Health Sciences, Trade and Industrial Education, Technology Education/Industrial Arts, and Family and Consumer Sciences. These areas will be reviewed and re-organized as Montana develops the new Career Fields/Clusters framework.

Postsecondary

Postsecondary career technical educational institutions (referred to as two-year postsecondary institutions) eligible to receive Perkins funding include: five colleges of technology, three community colleges, seven tribal colleges, and one four-year institution that offers technical associate of applied science degrees and certificates. The programs offered by these institutions are categorized in the following areas: Agriculture and Resource Management; Business Management, Administrative Services, and Marketing; Computer and Information Services; Construction Trades; Culinary Arts; Engineering and Related Technologies; Health and Human Services; Mechanics, Repair and Production; Protective Services; Transportation and Material Moving; and Visual Arts. (A comprehensive postsecondary course list organized by Career Clusters, is included in Appendix #4)

Technology Improvement

Secondary

To be eligible for funding, all secondary CTE programs must address and meet the minimum standards established for secondary CTE by the Office of Public Instruction in the *Montana Standards and Guidelines for Career and Vocational/Technical Education*¹. As part of the application process, each CTE program completes a program self-assessment designed to help programs identify areas of strengths and need, which might include keeping current with industry standards and improving and expanding technology. CTE specialists at OPI review each self assessment and provide technical assistance to improve CTE program delivery. Through this process, technology needs are assessed and schools are provided with an opportunity to target future expenditures towards improving and expanding identified technology needs. OPI also supports statewide professional development opportunities in technology when opportunities arise using leadership dollars.

Postsecondary

Technology is addressed during program development and curriculum reviews at each of Montana's postsecondary institutions.

¹ The OPI intends to update the "vocational" terminology when the standards and guidelines are revised during the 2008-2009 timeframe. The standards and guidelines are available at <http://www.opi.state.mt.us/PDF/CTE/combinedguidelines.pdf>

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Academic policy for the Montana University System (MUS) requires that the Board of Regents review and approve all new postsecondary educational programs (i.e. degrees, majors, minors, options, and certificates); substantive changes in those programs; delivery of programs in a distance format; changes in organizational structure; and revision of institutional mission. Through this process, technology needs must be addressed as well as facilities and library support. The proposal must include information about process followed, faculty involvement, use of technology, employer community input, and market demand for graduates. Each MUS campus must also review all of its programs at least once every seven (7) years. As part of this review, each campus must indicate the current level of technology required to support the program.

In developing a *BSP* each eligible recipient must engage a local Advisory Board relevant to the occupational specialties within the pathway. Development of curriculum will include equipment and technology required to prepare the student for the workplace. When applicable and appropriate, the eligible recipient may consider forming a joint business advisory board in partnership with other eligible secondary or postsecondary recipients offering similar CTE programs in a community or region of the state. The intent of creating a joint advisory board is to encourage greater collaboration between secondary and postsecondary programs and more efficient coordination with the business community.

2.2.6 Approval Criteria

Applications by eligible recipients for funds under the Perkins Act of 2006 must fully address the required contents as specified in Section 134 (b) of the Act and must adhere to the criteria specified in the local application. To fulfill the requirement of this section, the State will give additional attention to elements of the local plan from Section 134(b) that are of particular relevance in addressing each element of this section.

Academic achievement

The **State CTE Executive Leadership Team** will review the recipient's description of activities relating to 134(b)(3)(B) explaining how the recipient will improve academic skills of students, by improving academic components of programs through the integration of rigorous and coherent content. The State CTE Executive Leadership Team will look for specific evidence that indicates academic content is being integrated on a consistent basis in each CTE program offered by the eligible recipient. Evidence will include professional development activities that include CTE and core academic teacher collaboration, and revisions of CTE curriculum to integrated academic content.

Technical skill attainment

The **State CTE Executive Leadership Team** will review the recipient's description of activities relating to 134(b)(3)(C) explaining how the recipient will address all aspects of industry in its CTE programs, and 134(b)(3)(D) explaining how the recipient will provide for professional development that will help teachers integrate relevant career and technical education content. In its review of local applications, the State will look for specific evidence that indicates that the technical content of all CTE and courses offered by the recipient is being regularly reviewed, is being compared with information about industry-based standards, is being updated accordingly,

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and that teachers are provided professional development opportunities to help them teach the new content effectively.

OCHE and OPI will take the lead in carrying out projects relating to identifying industry skills, and providing professional development around current industry standards. The eligible recipient will need to indicate how it is utilizing these resources for program reviews, and encouraging CTE faculty to participate in these professional development opportunities.

Current or Emerging Occupational Opportunities

In the program approval and review process, the State will ask each eligible recipient to explain how each program area relates to current or emerging occupational opportunities. For postsecondary, programs that relate to current or emerging occupational opportunities will be given a high priority for funding of activities than those that are not. During the transition year, the Partner Agencies worked with the State Department of Labor and Industry's Research and Analysis Bureau and the University of Montana to organize and reformat workforce information in a way that is most useful to school districts and two-year postsecondary institutions for program planning purposes. The Department of Labor and Industry and the Office of the Commissioner of Higher Education utilize a criteria for determining high-skill, high-wage, or high-demand occupations. These criteria are referenced in Appendix 6.

Section 118 of Perkins law, specifies that an entity to provide occupational and employment information be jointly designated by the Governor of a state and the eligible agency for Perkins. The designated entity for Montana is the Department of Labor and Industry, Research and Analysis Bureau.

In addition, the **State CTE Executive Leadership Team** will review the recipient's description of activities relating to 134(b)(11) explaining how the recipient will provide career and academic guidance to career and technical education students, as well as 134(b)(8)(C) in which the recipient describes how it will prepare special populations for "high-skill, high-wage, or high-demand occupations that will lead to self-sufficiency".

2.2.7 Secondary Preparation for Graduation

All CTE Students

Montana's general education philosophy and general education requirements mean that there are not separate requirements for students who participate in CTE programs. Students who participate in CTE programs are required to meet the same rigorous graduation requirements and academic standards as any other student, as dictated by the State of Montana and local accredited school systems.

Because of Montana's low population and average size of schools, all students take the same academically challenging sequence of courses. Because schools are small, students specializing in different disciplines are in the same classes, not separate sections or "tracks." Montana also does not have a separate track of study based on student ability.

The Superintendent of Public Instruction and the Board of Public Education believe that basic academic requirements form the solid foundation for each school's education program. Such a

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foundation ensures Montana citizens that its public schools are providing all children with challenging academic expectations. These academic expectations are defined in the K-12 content and performance standards for all subject areas describing what all students should know, understand, and be able to do. Standards are the framework and foundation by which district, school and classroom curricula are developed or revised, organized, implemented, assessed, encouraging districts and teachers to place emphasis on critical areas of learning.

Reforms and improvements to instruction initiated under the direction of the Superintendent and the Board, and implemented in response to the Elementary and Secondary Education Act of 1965 (ESEA)², are intended to help all Montana students, including those enrolled in CTE programs, graduate from high school with a regular diploma at a higher rate.

Special Populations

The Perkins Act identifies the following students as “special populations:”

- individuals with disabilities;
- individuals from economically disadvantaged families, including foster children;
- individuals preparing for non-traditional fields,
- single parents, including single pregnant women, and
- individuals with limited English proficiency.

It is essential in CTE programs, particularly for students in special populations, that each student has a well defined personal plan for reaching his or her goals for high school graduation and further education and/or employment beyond high school. The Big Sky Pathways available to secondary students and postsecondary students will identify several options in postsecondary education for high-skill, high-wage, and high-demand employment for students. The student’s personalized plan of study for the BSP will serve as a guide, along with other career planning materials, to help the student choose the appropriate academic and CTE classes that are required for high school graduation and further advancement in their chosen pathway. Secondary students participating in a BSP will know the critical importance of high school graduation for their personal success.

For students with disabilities who participate in CTE programs, federal requirements (ESEA), the Individuals with Disabilities Education Act (IDEA), and Section 504 of the Rehabilitation Act) already require that students receive the full range of supplemental services to help them succeed educationally and in making successful transitions to further education and employment after completing their public education. At the local level, each student with a disability has an Individualized Education Program (IEP) developed by the IEP team.

The IEP addresses the student’s postsecondary goals based upon age-appropriate transition assessments related to training, education, employment and independent living skills, where appropriate, and transition service needs including courses of study. All the secondary school systems offer supportive services to assist students with disabilities if those services are determined to be necessary in the child's IEP. Montana school districts normally consist of only one secondary school (only four of our high school districts have more than one high school);

² The ESEA was most recently amended in 2001 through the *No Child Left Behind Act of 2001*.

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therefore the disparity of supplemental services between schools in the same district is not an issue.

In addition, Montana has a high rate of integrating students with disabilities into the regular education classroom. Only 11.2 percent (Federal Fiscal year 2005) of students with disabilities are served outside of regular classes for more than 60 percent of the day and only 1.5 percent of students with disabilities are educated in public or private separate facilities. Special education services are provided in all secondary schools in Montana.

While not identified as a special population in the Perkins Act definition, the law does require reporting of student data according to the subgroups listed in ESEA (“disaggregated by race, ethnicity, gender, disability status, migrant status, English proficiency, and status as economically disadvantaged” as well as by the special populations in section 3(29) of the Perkins Act. One subgroup mentioned in ESEA that is not in Perkins is migrant status. As such, each eligible recipient will report performance disaggregated by these subgroups, and identify disparities in performance between the disaggregated groups and all students served under the Perkins Act.

The State also offers bilingual, migrant and refugee services through the OPI. Local districts requiring assistance with these special populations are provided assistance to meet individual student needs. CTE students eligible for Title I services under the Elementary and Secondary Education Act also have team developed educational plans that address the individual educational needs of these students. Students enrolled in nontraditional programs and limited-English-proficient students receive services from the counseling department.

Promising Practices for Serving Special Populations

A particularly significant change in Perkins IV makes providing services to special populations a required use of local funds for eligible recipients. These services are meant to prepare special populations, including single parents and displaced homemakers who are enrolled in secondary and postsecondary CTE programs, for high-skill, high-wage, or high-demand occupations that will lead to economic self-sufficiency.

For some time, the emphasis in the Perkins Act has been on non-discrimination and equal access to services for special populations. Procedures for this are in place and are referenced in Section 3.1 and 3.2 of this plan. Now, in concert with similar accountability requirements in ESEA that provide greater scrutiny to academic performance of students in certain sub-groups, there is a renewed urgency to discover educational strategies to improve student performance and close achievement gaps for CTE students in special populations.

Montana will provide leadership to assist school districts and two-year postsecondary institutions to gather and share information about strategies for special populations that show promising outcomes and can be implemented with reasonable costs. Montana refers to this activity as its *Promising Practices Initiative*.

As part of the Initiative, the Partner Agencies will analyze program data on the performance of special populations against the performance indicators used under Perkins 1998 as well as other relevant data already collected by school districts or two-year postsecondary institutions in Montana. The Partner Agencies will also survey teachers and faculty, administrators, and

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coordinators focusing on the needs of special populations to determine what are perceived to be the biggest knowledge gaps about promising practices relating to special populations. Also, convening a work group of practitioners to address the promising practices initiative will assist the state in better identifying where knowledge gaps exist.

Using this information, the **State CTE Executive Leadership Team** (with input from staff and the State CTE Advisory Committee) will create a plan for the strategic use of state funds for identifying and sharing promising practices for services to Special Populations. The guidelines for implementation of a Promising Practices Initiative would be outlined in a Request for Proposals.

A list of strategies for serving special populations is included in Appendix 5, Promising Practices for Special Populations. This list is for illustrative purposes, and derived from a review of what other states, particularly rural ones similar to Montana, are doing to improve the retention and completion rate of special population students enrolled in CTE programs at the secondary and postsecondary levels. The *Promising Practices Initiative* is intended to place on ongoing focus on improving services to special populations, and to determine the relative effectiveness of the strategies included in Appendix 5 as well as other approaches. The list of strategies is meant to be considered as options, but not as a mandate or limit on the uses of funds to serve special populations. Any specific approaches selected should be designed around the needs of a particular community and could include alternate approaches not listed in the State Perkins plan.

In gathering information and making funding decisions, the Leadership Team will review the possible effectiveness of a range of suggested strategies provided in Appendix 5. The needs of the community to be served would direct the type of strategy to be utilized. The strategies that are implemented will be reviewed over time for their relative efficacy, and results will be shared with other districts and colleges through written materials and professional development experiences.

The State CTE Executive Leadership Team may also choose to convene an ad hoc working group, comprised of individuals with expertise on services to special populations, to review information about strategies and provide input on the Special Populations Initiative.

2.2.8 Preparation for High-Skill, High-Wage, High-Demand Occupations

Perkins IV places a strong emphasis on preparing students for participation in high-skill, high-wage or high-demand occupations. To meet with requirement requires ongoing attention to data on current and emerging occupations. OCHE and OPI are initiating renewed collaboration with the Research and Analysis Bureau of the Montana Department of Labor and Industry in order to more quickly and effectively transmit workforce trend analyses to program administrators.

This information will also be attached to information about the *Big Sky Pathways*, so that students can make well informed educational and career choices.

The *Big Sky Pathways* themselves include a mix of challenging academic content and relevant career and technical content, based on current industry standards and state academic content standards.

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Montana's Standards and Guidelines for Secondary Vocational and Technical Education (the term “vocational” has not been updated by Montana legislature) sets out several general criteria to ensure that programs prepare CTE students for opportunities in postsecondary education or entry into high-skill, high-wage or high-demand jobs in current and emerging occupations:

1. *The program shall have the primary objective of developing skills leading to employment as well as entry into advanced career and technical training.*
2. *The program shall be based on the career and technical education needs of students in the area.*
3. *Instruction shall be based on an analysis of skills and knowledge required in the occupation.*
4. *The program shall develop leadership and character through activities that accommodate the transition from school to work.*
5. *Provision shall be made for career guidance and shall include, but not be limited to, occupational information and career counseling.*
6. *Instructional equipment and facilities shall be comparable to those used in the occupation.”*

The ***Montana Standards and Guidelines for Vocational and Technical Education*** will be revised during implementation of this plan. These are the standards by which CTE programs are evaluated and approved at the secondary level. During the process, in which there will be significant opportunity for public input and involvement of educators, program standards will be reviewed, and programs will be aligned with the *Big Sky Pathways* during this revision. Accreditation standards in technology, workplace competencies, and career and vocational/technical will be used as the basis for aligning curriculum.

Part of the Standards and Guidelines review will include a review and cross-walk process for state academic standards with the academic content resident that already exist in each CTE course. These cross-walk resources, accompanied by professional development about how to integrate this academic content into all CTE courses, will strengthen student preparation for postsecondary studies and workforce participation.

Special Populations

As noted in Section 2.2.7 and Appendix #5, Montana will launch a *Promising Practices Initiative* to better document practices that can help all school districts and two-year postsecondary institutions improve performance of special populations against the Perkins Performance Indicators. These practices that will be identified include strategies to help special population students be well prepared for opportunities in postsecondary education and participation in high-skilled, high-wage or high-demand occupations in current and emerging career opportunities.

2.2.9 Improving and Developing CTE Courses

Improving or developing new CTE courses is a means for the State to encourage efforts to assure that the CTE offered to students is of the highest quality and reflective of current and emerging occupational areas. It is in the State's best interest that state agencies, business and industry, and communities work together to assure that workforce development efforts are complementary and not unnecessarily duplicative.

The Montana Accreditation Standards builds a common set of standards — a framework — for all Montana students. This framework defines the general knowledge of what all students should know, understand, and be able to do in each subject area and sets specific expectations for student learning at three benchmarks in the K-12 continuum - at the end of fourth grade, eighth grade, and upon graduation. Performance standards describe student achievement at each of these benchmarks at four performance levels: advanced, proficient, nearing proficiency, and novice. The Montana OPI uses a similar reporting approach for academic performance under the ESEA. The content standards, benchmarks, and corresponding performance levels provide teachers, parents, students, and the public with a clear understanding of what students are expected to learn and how well they are able to apply their learning.

Statewide accreditation standards are in place for the following content areas: arts, literature, media literacy, reading, speaking and listening, writing, health enhancement, library media, mathematics, science, social studies, world language, technology, workplace competencies, and career and vocational/technical.

On an annual basis, Montana administers criterion-referenced tests (CRT) that are required and funded by ESEA. Montana's CRT is published by Measured Progress, Inc. Montana's criterion-referenced test compares student achievement to Montana content standards, and administered in grades 3 - 8, and 10 in Reading and Mathematics.

Through revision of the *Montana Standards and Guidelines for Vocational and Technical Education* with a focus on academic and CTE integration, Montana will assure that CTE courses are closely aligned with the academic standards that are established for all Montana students.

Postsecondary Content that is Relevant and Challenging

Montana will require that eligible recipients indicate how business and industry is giving input into the CTE curriculum. Programs that do not have affiliations with business and industry are required to establish and maintain a business and industry affiliation in order to be eligible for funding.

The state will encourage, through the Big Sky Pathways Consortium, the development of statewide articulation agreements by utilizing a centralized database to track all articulations.

High-wage, High-skill or High-demand Occupations

Using the definition of High-wage, High-skill, and High-demand occupations provided in Appendix #6, the Partner Agencies will take action to indicate the designations of occupations that are high-skill, high-wage or high-demand for the state. This will be completed at the level of Classification of Instructional Programs (CIP) codes to assure consistency across the state.

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This information will be updated by the OCHE Accountability Specialist responsible for each CIP code and will be entered in the respective databases operated by OCHE and OPI.

2.2.10 Title I and Title II Best Practices

The Partner Agencies, in coordination with the Big Sky Pathways Consortium, will gather examples of promising practices and create short profiles for the State websites. These promising practices will focus on each of the career clusters and pathways and will also focus on intervention strategies for improving performance on the performance indicators.

Based on current state needs and drawing upon information from the Perkins data, the Partner Agencies will identify exceptional Montana strategies and performers. During regularly scheduled technical assistance meetings, the identified programs will share their promising practices with the other grantees.

2.2.11 Linking Secondary and Postsecondary CTE

Montana is placing increased emphasis on the development and continuous improvement of a seamless system of education that supports smooth student transitions from one educational system to another and from one level of instruction to another. Funds will be used to strengthen the link between secondary and postsecondary education in the following ways:

Use of leadership funds for partnership activities such as, but not limited to:

- Convening BSP advisory boards
- Gathering data on percentage of CTE students that enroll in dual enrollment courses
- Gathering information on how many high school students are earning transcribed credits from two-year postsecondary institutions, using data from the BSP database that will be developed
- Using leadership funds to support pilot testing the use of college placement tests (Compass and Accuplacer) for high school juniors and seniors, so they can avoid remediation at the college level
- Providing professional development activities for both secondary and postsecondary teachers and administrators

2.2.12 Integration of Academic and CTE Content

Montana will develop several processes to be able to better report on the integration of coherent and rigorous CTE content which is aligned with challenging academic standards (Academic/CTE Integration). These include:

- Completing the cross-walk between CTE course content and the state academic content standards and providing technical assistance to teachers on the academic cross-walk resources;
- Strengthening the clarity of guidance on Academic/CTE Integration into the revised *Montana Standards and Guidelines for Career and Vocational/Technical Education*

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- Strengthening the focus on Academic/CTE Integration in program approval and program renewal applications;
- Creating a monitoring rubric relating to Academic/CTE Integration that will be incorporated into OPI's monitoring and technical assistance visits and technical assistance that is provided when a school district has failed to meet its performance targets for academic skill attainment.

Based on the information gathered each year from monitoring and technical assistance visits and from applications for program approval and renewal, OPI will prepare an annual summary for internal review of the progress that Montana CTE secondary programs are making with regard to Academic/CTE Integration.

2.3 Professional Development

Montana understands that Perkins IV articulates the need for professional development that is “high-quality, sustained, intensive, and classroom-focused,” as stated in section 124 (b)(3)(B). Montana is taking action to reform and strengthen the culture of professional development for teachers and administrators.

As evidenced in the requirements of this section, effective teachers possess a powerful mix of content knowledge and teaching skills, including ability to integrate academic content with CTE content, classroom management skill, ability to collaborate effectively with fellow teachers and faculty members; understanding how to analyze and apply data, earning necessary certifications and Industry-based Credentials, maintaining expert knowledge of the CTE field, and possessing strong academic skills.

As these knowledge and skills are recognized as needed for success in teaching and leading, Montana is making important strides in building a systematic approach to professional growth for its CTE teachers and administrators

In the fall of each year, the State sponsors a professional development experience among CTE educators, and has placed an emphasis on helping teachers understand the broad context of Big Sky Pathways, as well as providing an opportunity to update and strengthen their knowledge of industry trends and technology within the occupational areas in which they teach.

For the past three years, the State has sponsored a summer Career Clusters Institute, that brings together teachers and administrators at the secondary and postsecondary levels to explore and more fully develop the Career Clusters model that is being implemented in Montana.

The State CTE Executive Leadership Team is currently deciding the most appropriate form and venue for future state-level conferences.

In carrying out the new guidance from Perkins IV on professional development that is “intensive, sustained and related to classroom instruction,” Montana is making important progress in developing more intensive models of professional development.

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A new professional growth model is being developed known as the Extended Learning Experience. The Extended Learning Experience (ELE) strengthens and deepens teacher knowledge through a week-long, summertime professional development experience. For Tech Prep faculty, Industrial Technology and Agriculture teachers, the ELE helps teachers to study course content, curriculum, new technology, industry trends, and issues surrounding classroom instructional strategies and management. Currently, ELEs are being developed for Health Science and Family, Consumer Science teachers.

To supplement these activities, Montana is also exploring a new approach to professional development that would be built around identifying the knowledge and skills every CTE teacher and faculty member should possess. As these knowledge and skills needed by Montana's teachers are more clearly understood, that understanding would help shape the content of the Extended Learning Experience and other professional development opportunities. As these new models of professional growth are developed, Perkins recipients will be asked to explain how their proposed uses of funds will identify and strengthen the skills and knowledge that teachers and administrators need to be successful. This will assure that professional development activities at the local level (a required use of local funds) will meet the new definition of high quality, sustained, intensive and classroom-focused" professional development called for under Perkins IV.

Montana will also explore developing and implementing a professional growth concept known as the "Community of Practice." A "Community of Practice" is a group of interested teachers/faculty, administrators and counselors that come together during a fixed length of time to focus activity and learning around a particular challenge or promising practice. Communities of Practice, supported by state or local funds, could play a role in helping develop Montana's Big Sky Pathways, identify promising practices in academic/CTE integration, strengthening program quality through business/industry involvement, improving school and college performance in one specific performance target for the accountability indicators, or improving services to students from special populations.

In terms of coordinating professional development with those activities funded through the Elementary and Secondary Education Act and the Higher Education Act, staff from OCHE and OPI, respectively, meet on an ongoing basis with their peers responsible for professional development under other federal programs. In these meetings with colleagues, OCHE and OPI staff share updates on their activities under the Perkins Act and seek opportunities for collaboration and coordination.

2.4 Teacher Recruitment and Retention

Building and maintaining Montana's CTE teaching force may be one of the biggest challenges facing the state and its school districts and colleges. The first challenge is to have a clear understanding of the options for action.

To create a workable strategy for these issues, the **State CTE Executive Leadership Team** will convene a **CTE Teaching Force Study Group** to examine the issue of teacher supply and retention. The Study Group will examine data to address a variety of issues about the supply of Montana's teachers, and recommend strategies for replenishing the current teaching workforce as retirements and departures take effect. The Study Group will explore strategies to more closely

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link the preparation from two-year college CTE programs with university teacher preparation programs in order to simplify and streamline the teacher preparation process. The Study Group will also explore the role of teacher career pathways and school-based teacher career academies, as well as awareness activities among the Career Technology Student Organizations to encourage more youths to enter the CTE teaching profession. Other issues for review might include: dual certifications (such as health science certification for science teachers), to facilitate the delivery of CTE programs in more rural settings and to fulfill teacher quality requirements of the No Child Left Behind Act; use of differential pay structures at the postsecondary level for hard-to-fill teaching slots; and, exploring if student loan forgiveness options for teachers in high-need areas can be applied for CTE teachers and/or faculty.

Retention

In terms of CTE teacher retention, research indicates that fewer than 50 percent of all teachers will continue teaching past their fifth contract year. One of the major reasons teachers leave the profession is a lack of support they experience, and the feeling that they are alone in their teaching.

One innovative strategy already underway in Montana shows promise for strengthening the induction process and improving retention. Through Montana OPI, the Agriculture teachers and OPI's Agriculture Education specialist have implemented a teacher mentoring/induction program. The teacher mentoring program teams a beginning or first year teacher with an experienced teacher of his or her choosing. At least once (during the first year) the mentor teacher will visit and observe the Protégé' teacher at their school, and the Protégé' teacher will visit and observe the Mentor teacher at his school. Additional contact between the two teachers will happen via phone calls, e-mails, and the Montana Educational Telecommunications Network, or METNET. A private conference room has been established to allow open, secure communications between the teachers.

The program will cover a two year period, with structured learning experiences integrated into the program. After the completion of the first year of the Agriculture Teacher Mentoring Program is completed, new mentoring programs will be implemented for the other curricular areas in CTE, namely Business and Marketing, Family and Consumer Science, Health Occupations and Industrial Technology.

Transition to teaching from business and industry

Montana recognizes that more effective partnerships for recruitment of CTE teachers need to be explored. Montana will also evaluate and expand the current links with industry that allow for sharing of business and industry professionals in the classroom or lab setting with schools and colleges.

2.5 Transition to Baccalaureate Programs

Approximately 280 associate degrees are offered at Montana's two-year colleges. Within the 19 public two-year colleges, 17 offer an Associate of Arts degree that is meant to be transferable, and 17 offer a transferable Associate of Science. (Source: 2006-2007, Your Guide, Montana's Certificate and Associate Degree Programs).

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One of the three goals of the Board of Regents' 2006-2010 Strategic Plan is to: "Increase the overall educational attainment of Montanans through increased participation, retention, and completion rates in the Montana University System."

Goal III (3) of the BOR Strategic Plan is to "Improve articulation and transferability among all 2-year and 4-year institutions, including community colleges and tribal colleges." More specifically the Board established objectives, such as, "Facilitate the transfer process for students who start at a 2-year institution and decide to continue their education at a 4-year institution," and "Develop multiple pathways that transfer students can follow to complete their postsecondary educational plans. Those pathways may include course equivalency guides, articulation agreements, common learning outcomes, common coursework or course content, "block" transfers, and other creative options."

The Office of the Commissioner of Higher Education has initiated a Faculty Council Model for addressing the transferability of credit across the system. These councils are made up of faculty from various disciplines and their task is to evaluate course offerings throughout the university system and determine course equivalencies for a set of courses. The reasons for the faculty council model are important:

- Most significantly, institutional accreditation requirements specify that faculty must play a major role in the development of curriculum.
- Faculty are obviously the experts in evaluating course content and course comparability.
- Councils, made up of faculty from throughout the System, will help to ensure a system-wide approach to the effort.

The Montana University System is proposing a focused approach for this initiative:

- The faculty councils will concentrate their efforts on coursework at the 100 and 200-level and will determine learning outcomes for the courses described above.
- Common course numbering across the system will be implemented
- The councils will be selected, based on the programs and coursework that are most frequently replicated throughout the System, and the programs that have the most transfer students.
- A faculty council will focus on the issue of dual enrollment, identifying college courses that qualify as dual credit, recommending necessary policy changes, and developing a systematic method for tracking dual enrollments throughout the state.
- Data will be collected to determine the effectiveness of the transferability effort.

Prior to the implementation of the Faculty Councils, OCHE worked with faculty and the Board of Nursing to establish a model curriculum for nurse preparation connecting the Licensed Practical Nurse, the Associate of Science Registered Nurse and the Bachelor of Science Registered Nurse. In light of these strategic objectives, the State CTE Executive Leadership Team will review policies relating to the transfer of students from Montana's two-year CTE college programs to the State's college and university programs.

The State CTE Executive Leadership Team will identify any specific policies that currently allow transfer of an **Associate of Applied Science to the Bachelor of Applied Science degree**, and through the development of Big Sky Pathways, will encourage the exploration of programs

that can be articulated to bachelor degree programs. The Leadership Team will also identify any policies adopted by the Board of Public Education related to dual credit, and distance learning.

[Addendum: taxonomy of career and technical education programs that align with Board of Regent Policy 301.12].

2.6 Stakeholder Involvement

The State of Montana is committed to maintaining a consultative and cooperative environment for the development, implementation and evaluation of quality career and technical education programs. At the state level, the Partner Agencies are convening a new State Advisory Committee to provide ongoing input and information to the OCHE and OPI. The State Plan Advisory Committee required by statute has also provided valuable input on the development and implementation of the Perkins State Plan and its supported programs.

Secondary

The *Montana Standards and Guidelines for Vocational and Technical Education* already require participation of multiple stakeholders through “vocational/technical education advisory councils/committees.” Montana Standards for Local Vocational Advisory Committees state that a vocational advisory committee is a group of persons, the majority of whom are outside the education profession, are representative of the community, and are recognized and respected in their fields of work. They advise and assist decision makers on the design and maintenance of sound vocational education programs based on the real needs of the community, region, state, or nation.

Postsecondary

Stakeholder participation in program planning, implementation, and evaluation also is well established at the postsecondary level. Most local institutions of higher education involve citizen advisory boards in career and technical education programs. OCHE encourages all local institutions to develop similar structures to allow stakeholders to participate in program planning, implementation, and evaluation. In addition, the local application process for Perkins funds requires all eligible institutions to actively involve students, parents, teachers, local business, and labor organizations in the planning, development, implementation, and evaluation of career and technical education programs.

2.7. Academic and technical skills, All Aspects of Industry, Challenging Academic Standards

In order to ensure student learning in academic and technical skills, Perkins IV requires states to report on performance metrics that measure academic and technical skill attainment. This encourages continuous improvement in CTE programs leading to a strengthening of the academic and technical component of the programs through integration of academics and CTE.

Academic skills attainment

At the secondary level, Perkins IV measures learning in the core academic subjects by relying on the state’s ESEA assessment. Specifically, Perkins IV requires reporting for Academic Attainment – Reading/Language Arts and Academic Attainment – Mathematics. In establishing

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the performance levels for academic attainment, Montana is setting the same performance target for CTE students as it sets for all secondary students.

Technical skills attainment

Perkins IV requires new measurements for technical skill attainment, using assessment instruments that are valid and reliable, based upon industry-recognized standards, where they are available. States are not required to use industry-based credentials, and often it is difficult to obtain performance data from such credentials, since the results legally belong to the student, not the school or college. If the state does not use industry-based credentials, it must use another assessment mechanism that meets criteria for validity and reliability.

To implement this new requirement, Montana OPI is conducting a survey of its CTE programs to determine what assessments are currently in place. OCHE is also reviewing the use of program assessments, including the use of vendor-based assessments and Industry-Based Certifications.

During 2008 and 2009, Montana will coordinate development of the Big Sky Pathways with activities related to CTE assessment. The State CTE Executive Leadership Team, working closely with teachers and administrators from local programs, will identify what competencies should be assessed in each of the Big Sky Pathways and other CTE courses, and determine what assessments mechanisms are most appropriate.

The State CTE Executive Leadership Team will pay particular attention to ensuring that the assessments selected or recommended meet a standard of validity and reliability, are affordable to use on an ongoing basis, provide relevant data on student CTE achievement to the teacher to inform their instructional practice, and can form the basis of a meaningful accountability system that supports the goal of continuous program improvement.

All Aspects of Industry

In developing guidance for the Big Sky Pathways and in updating the Standards and Guidelines for CTE, Montana will ensure that all students participating in CTE gain “strong experience in, and comprehensive understanding of, the industry that the individual is preparing to enter,” as defined by the Perkins Act. Montana will encourage local programs to take advantage of the foundation knowledge and skills provided through the Career Clusters framework, and well as working models of the “All Aspects” that include: Planning, Management, Finance, Technical and Production Skills, Underlying Issues of Technology, Community Issues, and Health, Safety and Environmental Laws.

Challenging Academic Proficiencies

In an effort to ensure that students who participate in CTE programs are taught to the same challenging academic proficiencies, Montana’s general education philosophy and requirements mean that there are not separate requirements for students who participate in vocational and technical education programs. Students who participate in CTE programs are required to meet the same rigorous graduation requirements as any other students, as dictated by the State of Montana and local accredited school systems.

2.8 State Technical Assistance

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Staff from OCHE and OPI will provide technical assistance to their respective constituents -- local teachers, faculty, counselors, administrators, and other personnel associated with the implementation of career and technical education programs primarily in the areas of administration, accountability, and program improvement.

Technical assistance is provided on a regular basis to all eligible secondary and postsecondary institutions in Montana. Technical assistance also is provided upon request on site at the various Perkins-eligible institutions. Because of the vast distances in Montana, technical assistance also is offered through video teleconferences. This ensures that all eligible recipients can participate in technical assistance within a 200-mile drive of their institution. Video teleconferences are frequently focused on Perkins issues such as core indicators, accountability, and reporting on special populations.

In accordance with the requirements of the Perkins Act, in relation to performance on the program performance indicators, secondary and postsecondary will carry out the following steps:

- The State will analyze annual Perkins Performance data to identify school districts and two-year postsecondary institutions that failed to meet 90 percent of their performance target.
- Grantees will be notified of the actual performance for each of the indicators in relationship to the indicator goals.
- When a program falls below an indicator goal, including goals for special populations and nontraditional student goals, the secondary or postsecondary specialist working with the recipient will determine the appropriate technical assistance to be provided;
- The specialist will document the technical assistance in written form and provide to the recipient;
- The recipient will be required to create a written program improvement plan with action steps related to the specific goals that were missed
- The technical assistance strategies and program improvement action steps identified will be included in the final report for the following year.

Technical assistance from the state may include:

- Best Practices/Promising Practices resource sheets for use by recipients
- Site visits and on-site mentoring by program specialists.
- Mandatory visits to other sites in the state that are implementing an exemplary practice.
- Mandatory participation in sessions at state professional development conference.
- Identify content experts within the State to provide phone and site-based mentoring.
- Identify resources outside the state, such as video conferences or webinars, that address the identified area of need.

2.9 Occupational Opportunities

The 2006 Board of Regents' Strategic Plan says that "...despite Montana's relatively low wages, our state has many high-paying jobs that go unfilled – in health care, construction, manufacturing, for example – due to a shortage of appropriately trained workers."

Goal II(2) of the plan is to "Increase degrees and certificated awarded in high-demand occupational fields." The report continues, "The Board of Regents has identified health care and construction occupations as the top priorities for training workers in high-demand occupations."

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Montana's strategy for relating vocational/technical education with the specific occupational opportunities of the state and region is based on the detailed Labor Market Information provided by the Montana Department of Labor and Industry, which tracks information such as growing and declining industries and occupations, prevailing wages by area, and demographic data including unemployment rates.

The "Labor Day Report 2006" indicates that the highest level employment growth were projected as follows for 2001-2005:

- Construction: 27,563 jobs in 2005 (30.2% growth over five years);
- Natural Resources and Mining; 11,158 jobs (19.4% growth);
- Financial Activities, 21,235 jobs (13.5% growth);
- Education and Health Services; 55,807 jobs (13.2% growth);
- Leisure and Hospitality; 55,228 jobs, (11.8% growth);
- Professional and Business Services; 35,126 jobs (10.7% growth)

Perkins IV makes numerous references to occupations that are "high-skill, high-wage or high-demand." While there is no federal definition given for these terms, Montana, in coordination with the Research and Analysis Bureau of the Montana Department of Labor and Industry has developed a Methodology defining the criteria for high skill, high wage, high demand careers. This definition will be applied to every CTE program that is supported by Perkins funding (See Appendix #6).

If local conditions for employment warrant a determination that a targeted occupation does not meet the state level criteria, but is appropriate for the local area, the local recipient may appeal to the **State CTE Executive Leadership Team** to resolve the issue.

In addition to program and funding approval, Montana is making efforts to ensure that its program standards are kept current and aligned with industry standards.

In 2007-2008, the State Standards and Guidelines for Agriculture are being revised, as the first phase of the Standards and Guidelines revision process. Agriculture Teachers have adopted and endorsed a modified and revised version of the national standards and guidelines to more accurately apply to Montana Schools. Agriculture teachers will also develop and endorse a plan for the implementation of the revised standards and guidelines for the state.

During the 2008-2009 school year, the other Career and Technical Education areas within Montana will follow a similar revision process, patterning the work in other areas after the finished final product developed by the Agriculture teachers, to provide consistency in the final products.

According to Board of Regent Program Review policy, in order to ensure program quality and effective stewardship of resources, every campus of the Montana University System shall conduct regular internal reviews of all of its academic programs. Those reviews shall include all programs listed in the "degree and program inventory" maintained by the Office of the Commissioner of Higher Education, and shall include options, minors not associated with a major, and certificates of more than 30 credits listed in the inventory.

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This policy shall not apply to the three community colleges associated with the Montana University System. Internal program review will be left to the local governing boards of those institutions. Each campus will review all of its programs at least once every seven (7) years. The campuses will prepare a schedule of review for all of its programs, and file that schedule with the Office of the Commissioner of Higher Education. That schedule will be updated, when new programs are added to each campus' program offerings.

2.10 Coordination with Other Federal Programs

Montana has general provisions to coordinate activities to prevent unnecessary duplication of services within the state. Each local application and grant proposal for funding must include a description of coordination of services with other eligible service providers at the local level.

At the state level, the federal secondary education programs are all part of the scope of work of the Montana Office of Public Instruction; staff responsible for the various federal education programs are all housed in the same agency, within the Department of Education Services. Because of this close physical proximity, program coordinators regularly meet both formally and informally to coordinate planning and information collection and to prevent duplication whenever possible.

Federal postsecondary programs are under the purview of the Board of Regents and the Office of the Commissioner of Higher Education.

The Partner Agencies administering Perkins IV, will coordinate activities under Perkins IV with the work and goals from the following Federal programs:

- Workforce Investment Act, title I, One-Stop Centers
- Workforce Investment Act, title I, Youth Services
- Workforce Investment Act, title II, Adult Education and Family Literacy Act
- Workforce Investment Act, Rehabilitation Act of 1973
- ESEA Title I, Academic Achievement of the Disadvantaged
- ESEA Title II, Preparing, Training, and Recruiting High Quality Teachers and Principals
- ESEA, Title III – English Language Learners
- ESEA Title IV – 21st Century Schools
- ESEA Title V – Parental Choices and Innovative Programs
- ESEA, Title V: Flexibility and Accountability
- ESEA, Title VII- Indian Education
- ESEA, Title VIII: Impact Aid
- Individuals with Disabilities Education Act
- Higher Education Act, Talent Search
- Higher Education Act, Gear Up
- DOL, Jobs for Montana's Graduates
- DOL, Workforce Innovation for Regional Economic Development

All of the above programs will continue to be coordinated throughout the state of Montana on both an informal and formal basis.

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The Director of Workforce Development and Two-Year Education, (OCHE) and the Division Administrator for Career and Technical Education and Adult Education (OPI) are also members of the State Workforce Investment Board, which affords cooperation and coordination between CTE and the state's workforce initiatives.

2.11 Non-duplication

Montana will ensure that there is coordination and non-duplication among programs listed in Section 112(b)(8)(A) of the Workforce Investment Act of 1998 by including representatives of secondary and postsecondary career and technical education on the Workforce Investment Board. One of the responsibilities of the State Workforce Investment Board is to ensure that there is no duplication among the programs listed in Section 112(b)(8)(A) of the Workforce Investment Act of 1998. These programs will present regular reports to the Workforce Investment Board to ensure that they are coordinating and not duplicating efforts.

2.12 Local Applications

The applications for secondary and postsecondary eligible recipients are included (see Appendices #8a and 8b).

Electronic copies of the secondary application can be found at:

<https://egrants.opi.mt.gov/OPIGMSweb/logon.aspx>

School districts need an ID to enter the system. Public access to the approved applications will be available on the site.

For security purposes, an electronic link for the postsecondary application will not be made available. Copies of the online database application screens can be viewed in

2.13 Governance Structure

The Montana Board of Regents of Higher Education (MBRHE) is the designated state board to coordinate the development and submission of the state plan for career and technical education as required by the Carl D. Perkins Career and Technical Education Improvement Act of 2006 (Perkins IV).

The State agencies responsible for career and technical education in Montana are the Workforce Development Unit of the Office of the Commissioner of Higher Education (OCHE) and the Division of Career, Technical and Adult Education of the Montana Office of Public Instruction (OPI). Montana's joint leadership structure and narrative is found in Appendix #3.

2.14 CTE and the One-Stop Career Center System

The State Workforce Investment Board (SWIB) is responsible for advising the Governor on the creation, implementation and continuous improvement of a comprehensive statewide workforce development system, designed to train the maximum number of unemployed and underemployed Montanans as possible. Postsecondary CTE is a mandatory partner of the SWIB. The designated "State Director" for administering the federal Perkins funds (from OCHE) is a member of the SWIB and sits on both the executive committee and the apprenticeship advisory committee. The goals of the SWIB are as follows:

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- Engage the workforce system in anticipating and responding to businesses' current and emerging needs for skilled workers;
- Encourage alignment among workforce development, postsecondary education, and economic development; and,
- Advance workforce development policies by providing recommendations to the Governor and other state leaders who support economic development efforts in Montana.

Postsecondary institutions throughout the state are required to have a representative on the Community Management Teams (CMT) representing both local organizations and one-stop career center members. As Montana is a Single State Planning system, the SWIB is both the policy and administrative body for administering Workforce Investment Act funding in the state.

III. PROVISION OF SERVICES FOR SPECIAL POPULATIONS

3.1 Program Strategies for Special Populations

Many of the traditional roles and occupations presented to students in special populations have not prepared them adequately for careers that enable them to become economically self-sufficient. Limiting roles and occupations on the basis of gender, race, disability, or age prevents individuals from achieving their fullest potential. In an effort to limit such practices, the partner agencies have the responsibility for developing and implementing procedures which will encourage and support each student and his or her pursuit of a rewarding career with emphasis on high-skill, high-wage, or high-demand occupations.

3.1.1 Equal access to activities assisted under the Act

In the local applications, Montana requires eligible institutions to indicate the specific strategies of how they will provide equal access to special populations, including what specific services are available in their institution.

Montana refers to all federal and state laws and regulations requiring public institutions to comply with requirements already set in place—such as guidance offices posting notices of equal access to all services in a prominent place, etc.

OCHE and OPI will provide consistent, standardized forms and information, uniform training of staff, appropriate accommodations, and an environment promoting equal access for all students; and

The Partner Agencies will continue to closely coordinate with the staff persons responsible for Civil Rights compliance in these efforts.

One responsibility of the *Promising Practice Initiative* will be to clarify the criteria by which applications from eligible institutions will be reviewed, and monitored against, in relation to how special populations are being served. These criteria, when more fully developed, will take into account the promising practices that have been suggested for implementation and shared within Montana, and the size of the institution/school districts and available resources of the eligible institution or consortia (Promising Practices Initiative is included as Appendix #5).

As part of the accountability system, every local recipient will receive a report indicating how special populations and non-traditional populations groups performed compared to the goals for these groups on the target performance levels. They will be required to document how they will work to close achievement gaps.

3.1.2 Nondiscrimination Policies

All postsecondary institutions and secondary schools have nondiscrimination policies in place and have published procedures for filing complaints should a student (or their parent or adult advocate) believe that discrimination has occurred. All policies have an appeal process in place.

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Notices of nondiscrimination will continue to be in all OCHE/OPI and postsecondary institutions and secondary schools publications. Nondiscrimination will continue to be monitored through the Office of Civil Rights review process and the local application process.

OCHE and OPI use the OCR process to ensure that postsecondary institutions and secondary schools provide activities to train staff and provide them with information on performing in a nondiscriminatory manner and maintaining a positive environment.

Within postsecondary institutions, there is in place a uniform system of “self disclosure” by students at orientation and strict confidentiality rules assist in ensuring that students will not be discriminated against.

3.1.3 Preparation for high-skill, high-wage, or high-demand occupations

Montana will place an emphasis on high-skill, high-wage or high-demand occupations, as defined in Appendix #7 This emphasis will be part of all plans for the student in order for them to become self-sufficient.

3.2 Alternative Education programs

Alternative education programs are provided primarily by secondary school districts, although in collaboration with these districts or other agencies, programs may be designed to meet the needs of students who are not successfully participating in the traditional education delivery system. The Partner Agencies will assure that students in all eligible programs, including students in alternative education programs, have the opportunity to participate in the State’s CTE programs. Eligible recipients will determine how the needs of students in alternative education programs will be addressed. In addition to provision of CTE programs, guidance and counseling and support services may also be provided. Some secondary districts are focusing on CTE for students in alternative education programs because it provides rigor and relevance to address non-traditional learning styles.

Under the Workforce Investment Act, Perkins postsecondary institutions have a responsibility to connect existing systems of educational planning and guidance with the one-stop centers to facilitate access to services and programs offered throughout the state.

3.3 Preparation in Non-Traditional Fields

The State will obligate \$60,000 of its State Leadership funds to promote preparation for nontraditional fields. The proposed state-level as well as local-level program activities supported through Perkins IV funding may include:

- professional staff development opportunities to help eligible recipients promote nontraditional training and employment;
- employment projects that introduce high school students to nontraditional employment through career assessment, “hands-on” career exploration, mentoring and networking with nontraditional workers in employment. Methods will include but are not limited to a statewide institute for nontraditional occupations introduction with follow up activities; and,

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- partnerships with the Montana's State Workforce Investment Board, State Agencies, and community organizations to promote nontraditional employment and training in all systems providing education and training for employment.

3.4 Correctional Education

In accordance with the Perkins guidelines for allocation of State Leadership Funds [Section 112(A)(2)(A)], Montana will obligate no less than .5% (approximately \$27,500) of its State Leadership funds to implement educational program(s) to serve individuals at state correctional institutions and institutions that serve individuals with disabilities. These funds will be distributed through a competitive process to allow agencies/institutions to provide career and technical education programs to individuals residing in state institutions. The uses of these funds will meet the requirements of the Perkins Act.

Current funds are being used to expand basic computing literacy and micro-computing in a state pre-release correctional program, to increase the successful integration of the student back into society.

3.5 Equitable Access

In the local applications, Montana requires eligible institutions to indicate the specific strategies of how they will provide equal access to special populations, including what specific services are available in their institution.

Montana refers to all federal and state laws and regulations requiring public institutions to comply with requirements already set in place-such as guidance offices posting notices of equal access to all services in a prominent place. OCHE and OPI will provide consistent, standardized forms and information, uniform training of staff, appropriate accommodations, and an environment promoting equal access for all students; and

The Partner Agencies will continue to closely coordinate with the staff persons responsible for Civil Rights compliance in these efforts.

IV. ACCOUNTABILITY AND EVALUATION

4.1 Input for Core Indicators

Secondary

The definitions for indicators 1S1, 2S1 and 4S1 will be the same as Montana uses as described in section 1111(b)(1) of the Elementary and Secondary Education Act (No Child Left Behind). Measurement definitions for 3S1, 5S1, 6S1 and 6S2 will remain the same as the previous performance indicators, which are familiar to the school districts.

As described in Section 2.7 of this plan, Montana is developing a measurement definition and approach for 2S1, the technical skill attainment indicator. The accountability specialist and/or other state staff have attended all Data Quality Institutes and actively participate in the Next Steps Working Group conference calls organized by the U.S. Department of Education's Office of Vocational and Adult Education. Information obtained from these activities is being utilized in determining the measurement definition/approach.

Beginning in 2008, working groups of teachers and business/industry will be convened to advise the **State CTE Executive Leadership Team** in development of the Technical Skill Attainment Indicator definition and approach. As the definition/approach is determined, it will be shared with the Montana ACTE and the School Administrators of Montana for review and comment, and adjusted as needed.

Postsecondary

The accountability specialists for OCHE will review the current data system and available baseline data. Reports will be prepared with historical data and definitions. Information from the Data Quality Institutes (DQI) in addition to issues that have been identified over the last six years will be addressed by the current grantees through a series of conference calls. Current grantees will develop definitions and approaches that will produce the most reliable and consistent data for the performance indicators required. The process for development of the technical skill indicator definition and approach will be closely coordinated with the process described for secondary.

4.2 Input for State adjusted level of performance

Secondary

The state performance level targets will be assigned to all districts. Previous year performance on the non-ESEA indicators will be reviewed to the degree that state's data system allows. Lower-performing districts in previous years will be given the option of negotiating alternate performance level targets. Negotiations will be on a case-by-case basis.

Postsecondary

Historical state performance indicator data will be reviewed and adjusted to account for the changes in definitions or approaches. A series of conference calls with eligible recipients will

be conducted to collect justifications for changes to current performance indicator goals. The current goals for the State, proposed goals and justifications will be posted to the Local Application Webpage for review by faculty and management staff, state staff and collaborative partners.

4.3 Validity and Reliability of Definitions and Measures

Secondary

For the Multi-Year State Plan, Montana has chosen to continue using its “blended” option for CTE Concentrators. Because of the extreme rural nature and small size of many Montana high schools, it would not be practical to only measure students who took three or more credits of CTE courses in a single program area. By using a very narrow definition of CTE Concentrator, as was suggested in the guidance, Montana is concerned that too few students would be represented in the Perkins Accountability system, and essentially, the accountability system would have little relevance or value at the local program level. By using the “blended” option, which includes any student who takes three or more courses in any CTE program area, more students in small rural settings will be included, and the resulting accountability system will have more relevance for local program improvement.

The OPI has developed an agency-wide data collection system called Achievement in Montana (AIM) that began use during the 2007-2008 school year. The use of this secure system is enhancing the reliability of data collected by the OPI. All school districts will use this system to report their data, which will be used for multiple state and federal programs. Since the system is a secure system, only trained personnel enter data on behalf of the school districts.

AIM tracks a wide variety of student information including:

- enrollment and demographic information for all students attending Montana public schools;
- scores on statewide assessments;
- information for determining a school's 'Adequate Yearly Progress Report' required by ESEA;
- student dropout information;
- information needed for serving students with disabilities; and
- participation of students in federal and state grant programs.

The AIM system provides tools to enable:

- interactive querying and reporting of the data in an integrated fashion;
- data driven decision making by state-level education staff and policy makers to meet increasing state and federal reporting requirements; and
- stakeholders at all levels of education to make informed educational decisions based on accurate and timely information

1S1 Academic Attainment – Reading/Language Arts

This indicator, used in conformity with procedures developed by the State and approved by the U.S. Department of Education under ESEA, is presumed to be valid and reliable. OPI will cross-match data with assessment scores through the AIM system.

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1S2 Academic Attainment – Mathematics

This indicator, used in conformity with procedures developed by the State and approved by the U.S. Department of Education under ESEA, is presumed to be valid and reliable. OPI will cross-match data with assessment scores through the AIM system.

2S1 Technical Skill Attainment

OPI conducted a survey of every secondary Perkins eligible program in the state to determine which programs have technical skill assessments, and which do not. Assessments will be reviewed and validated for reliability. The assessments will be categorized into national, state, or local assessments. In addition to externally developed assessments, Montana will work to determine if other forms of assessment will yield results that meet standards for validity and reliability. Specifically, the state will examine the viability of state-development tests and scoring rubric for observation of demonstrated student skills. These classroom-based assessments would be aligned to generally accepted and industry-recognized skill standards, and would be administered consistently within each CTE program area based on ongoing professional development and monitoring,

3S1 Secondary School Completion

Montana is using definition provided in U.S. Department of Education guidance issued on March 13, 2007, and administrative data that meets standards for accuracy and reliability, this performance measure is valid and reliable. OPI will cross-match data with completion information through the AIM system.

4S1 Student Graduation Rates

This indicator, used in conformity with procedures developed by the State and approved by the U.S. Department of Education under ESEA, is presumed to be valid and reliable. OPI will use the same NCES graduation rate formula approved in its ESEA state plan.

5S1 Secondary Placement

Montana is the definition provided in U.S. Department of Education guidance issued on March 13, 2007, and gathering data from each school district to determine secondary placement. Follow-up placement data will be gathered using a time-tested survey method that is consistent across all Montana districts. Data will be entered into the AIM system by the districts who conduct the surveys. Use of the survey system ensures that information is obtained from the students themselves, not from samplings or projections.

6S1 Nontraditional Participation

Using the definition provided in U.S. Department of Education guidance issued on March 13, 2007, and based upon data gathered by each school district to determine nontraditional participation. OPI will cross-match USDE identified non-traditional occupations/fields with data collected through the AIM system.

6S2 Nontraditional Completion

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Using the definition provided in U.S. Department of Education guidance issued on March 13, 2007, and based upon data gathered by each school district to determine nontraditional completion. OPI will cross-match USDE identified non-traditional occupations/fields with data collected through the AIM system.

Postsecondary

1P1 Technical Skill Assessment

OCHE is conducting a survey of every postsecondary Perkins eligible program in the state to determine which programs have technical skill assessments, and which do not. Assessments will be reviewed and validated for reliability. The assessments will be categorized into national, state, or local assessments. In addition to externally developed assessments, Montana will work to determine if other forms of assessment will yield results that meet standards for validity and reliability. Specifically, the state will examine the viability of state-development tests and scoring rubric for observation of demonstrated student skills. These classroom-based assessments would be aligned to generally accepted and industry-recognized skill standards, and would be administered consistently within each CTE program area based on ongoing professional development and monitoring,

2P1 Completion

Many of the 2 year program offered in high demand occupations have low completion rates because students are hired before graduation and do not apply for their diploma until making a job change in the future. In addition, many transfer students will not apply (pay) for their AS degree although they meet the requirement for the degree because they intend to attend a 4 year program. These two factors skew the validity of a true completion measure. Montana will share strategies to encourage or facilitate these groups to follow through with the completion of their program.

3P1 Student Retention or Transfer

The system in place for Montana matches the data at the state level. The Accountability Specialist matches students against the Montana University System Data Warehouse and the National Student Clearing House. For data inconsistencies between the two reports, individual requests for student information are dispersed to the appropriate institution for validation. Once validated, the source of the incorrect information is notified.

4P1 Placement

The system to verify placement is similar to verifying 3P1 data. Montana uses the Montana Unemployment Wage Records and the FEDES database to verify employment. The data does not include those who are self employed or work for an employer who does not pay unemployment in Montana. Montana continues to pursue a national source for unemployment wage data as well as collecting survey data student in both these employment situations.

5P1 Participation for Nontraditional

Montana uses nontraditional gender indicators by CIP code as identified by National Alliance for Partners in Equity (NAPE). CIP codes identified by the colleges are validated against CIP codes for similar program throughout the state. If a CIP code is

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found to be inaccurate, and therefore does not accurately reflect the nontraditional indicator an alternate CIP code is used and the justification is documented.

5P2 Completion for Nontraditional

The validation and reliability measures for 5P1 and 4P1 apply for this indicator.

4.4 Alignment of Indicators Among State and Federal Programs

Secondary

OPI is using Elementary and Secondary Education Act (ESEA) benchmarks and approaches for 1S1, 1S2 and 4S1. Where appropriate, OPI will use statistical reporting criteria as established in the Special Education State Performance Plan.

Postsecondary

OCHE has worked closely with state agencies to establish a process for sharing data across the workforce system. These agencies include: Department of Labor (DOL) for employment information, Vocational Rehabilitation (VR) to identify persons with disabilities, and Temporary Assistance for Needy Families (TANF) to share or validate information regarding special populations.

4.5 Performance Levels

Performance levels for each of the core indicators of performance for the period covered by the Transition Plan, expressed in a percentage or numerical form, so as to be objective, quantifiable, and measurable; and require the State to continually make progress toward improving the performance of career and technical education students. [Section 113(b)(3)(A)(i)-(ii)]

Secondary

See measurement approaches in the charts below for performance levels. The performance for each of the indicators will be adjusted by annual increase of .5 percent unless the indicator performance level is 95 percent or higher, then no increase will be required.

Postsecondary

Part C lists the baseline data and proposed adjusted performance levels for the first two years for measures 1P1, 5P1, and 5P2.

4.6 Reaching Agreement on Local Performance Levels

When the state has reached agreement with the U.S. Department of Education about the adjusted level of performance for each of the secondary and postsecondary indicators, each of the Partner Agencies will notify the eligible recipients of what the level has been established.

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The Partner Agencies will determine an appropriate number of days by which an eligible entity must notify the state of its intent to request a negotiation over one or more of the adjusted levels of performance.

When such a request for negotiation has been received, depending on whether the eligible recipient is a college of technology or a school system, the responsible agency will review and analyze all historical data available for the eligible recipient (if such data is available) to determine an acceptable local adjusted level of performance. This information will be provided to the eligible recipient for review. The eligible recipient will be given the opportunity to review and agree/disagree on their baseline data before it becomes binding, and to make specific requests for revisions to their local adjusted level of performance. Based on the objective criteria determined by the Accountability Specialists, the request will either be approved, denied or an alternative performance level will be established by the Specialist.

4.7 Request for Revisions to Local Performance Levels

The objective criteria and methods used to allow eligible recipients to request revisions to its local adjusted levels of performance will be determined by the Accountability Specialists. Reasonable unanticipated circumstances that may arise could warrant local recipients to negotiate levels of adjustment with the state.

4.8 Data Reporting

Secondary

The OPI will employ several measures to ensure that the secondary education data reported from school districts and subsequently reported to the Secretary are complete, accurate, and reliable.

First, the OPI will conduct annual monitoring of a portion of Perkins programs for congruency with written reports, effectiveness of programs, compliance with the grant application, and appropriateness of expenditures. Second, OPI's data collection system will ask every school district for the same information in the same way, and provide a reporting process that is the same for everyone, with clear definitions of terms. Third, the requested data will originate from individual student data from students themselves and from the AIM system rather than from sampling or projections. And, fourth, OPI will provide benchmarks, consistent with the state adjusted levels of performance, to determine how well each program is functioning individually, and how well the state is performing as a whole.

Postsecondary

A unified Perkins database was established in 2000 for postsecondary programs, ensuring consistent data from all programs. Enhancements to the system will be completed in 2007 to improve data integrity, allow for better accuracy for parameter queries, improve data input, increase the reporting capabilities to meet program needs and to tie the student data to the Local Application Grant Database so that activities can be linked to results. To help ensure accuracy and reliability, all local project directors have been consulted and will approve all enhancements. In addition, all directors will be trained to use the enhanced features. OCHE reviews postsecondary local data included in the annual report for completeness and accuracy. Potential data issues have been identified over the last seven years. Queries and reports have been created so errors or issues identified can be corrected before reports are run. The process will continue

and a journal of these quality control processes will be maintained. Regular program reviews and audits also ensure accuracy. Desk reviews are completed for all eligible institutions every year. On-site reviews are conducted with 25 percent of the eligible institutions each year.

4.9 Consortium Agreements and Performance Levels

Secondary

All indicators will default to the state negotiated level for the first three years of the consortium at which time trend data may indicate a renegotiation is warranted.

Montana requests a rural waiver, although it will encourage school districts to form consortia when appropriate.

Postsecondary

Postsecondary institutions in Montana do not form consortia under this provision.

4.10 Evaluation of Program Effectiveness

Secondary and Postsecondary

The Partner Agencies will use on-site program reviews and Perkins data generated at the state level for every school system and two-year postsecondary institution to evaluate performance.

Two-year postsecondary institutions and school districts that do not attain established levels of performance will be required to initiate improvement strategies to improve the standards, in addition to ongoing technical assistance/visits provided by OCHE and OPI staff.

Program assessments and areas of weakness are required parts of the local application. Local recipients as well as OCHE and OPI use this information along with performance levels percentages to determine program effectiveness.

Secondary Coordination

Perkins IV is the only federal program that provides funding for career and technical education programs. Therefore, the OPI does not need to coordinate with other federal programs to avoid a duplication of CTE services. However, the Division of Career, Technical and Adult Education will coordinate with other divisions within the OPI to ensure that general school improvement efforts are in alignment with Perkins program improvement efforts.

Postsecondary Coordination

The Governor endorses a State Agency Management Team for workforce development comprised of head agency officials. Representatives from both OCHE and OPI are members of this team. The team convenes monthly to discuss issues of mutual interest, improve cooperation and collaboration among departments and services. With regard to data coordination, OCHE matches student record data with National Student Clearinghouse (NSC), Federal Employment Data Exchange (FEDES), and the Montana University System Data Warehouse, and Montana Unemployment Insurance Wage Record data system.

4.11 Definition of Secondary Career and Technical Education Student Populations

CTE Participant – A secondary student who has earned one (1) or more credits in any career and technical education (CTE) program area.

CTE Concentrator – A secondary student who has earned three (3) or more credits in any CTE program area.

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4.12 Final Agreed Upon Performance Levels Form (FAUPL), Secondary Level

A. SECONDARY LEVEL

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Indicator & Citation	Measurement Definition	Measurement Approach	Baseline 7/1/06- 6/30/07	Year One 7/1/07- 6/30/08	Year Two 7/1/08- 6/30/09
1S1 Academic Attainment – Reading/Language Arts 113(b)(2)(A)(i)	<p>Numerator: Number of CTE concentrators who have met the proficient or advanced level on the Statewide high school reading/language arts assessment administered by the State under Section 1111(b)(3) of the Elementary Secondary Education Act (ESEA) as amended by the No Child Left Behind Act based on the scores that were included in the state’s computation of adequate yearly progress (AYP) and who, in the reporting year, left secondary education.</p> <p>Denominator: Number of CTE concentrators who took the ESEA assessments in reading/language arts whose scores were included in the State’s computation of AYP and who, in the reporting year, left secondary education.</p>	State and Local Administrative Records	B: 74.00	L: 74.00% A:	L: 74.00% A:

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Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Indicator & Citation	Measurement Definition	Measurement Approach	Baseline 7/1/06- 6/30/07	Year One 7/1/07- 6/30/08	Year Two 7/1/08- 6/30/09
1S2 Academic Attainment - Mathematics 113(b)(2)(A)(i)	<p>Numerator: Number of CTE concentrators who have met the proficient or advanced level on the Statewide high school mathematics assessment administered by the State under Section 1111(b)(3) of the Elementary Secondary Education Act (ESEA) as amended by the No Child Left Behind Act based on the scores that were included in the state's computation of adequate yearly progress (AYP) and who, in the reporting year, left secondary education.</p> <p>Denominator: Number of CTE concentrators who took the ESEA assessments in mathematics whose scores were included in the State's computation of AYP and who, in the reporting year, left secondary education.</p>	State and Local Administrative Records	B: 51.00%	L: 51.00% A:	L: 51.00% A:
2S1 Technical Skill Attainment 113(b)(2)(A)(ii)	<p>Numerator: The number of CTE concentrators who passed technical skill assessments that are aligned with industry-recognized standards, if available and appropriate, during the reporting year.</p> <p>Denominator: The number of CTE concentrators who took the assessment during the reporting year.</p>	State and Local Administrative Records	B: 80.00%	L: 80.00% A:	L: 80.00% A:

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Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Indicator & Citation	Measurement Definition	Measurement Approach	Baseline 7/1/06- 6/30/07	Year One 7/1/07- 6/30/08	Year Two 7/1/08- 6/30/09
3S1 Secondary School Completion 113(b)(2)(A)(iii)(I- III)	<p>Numerator: The number of CTE concentrators who earned a regular secondary school diploma, earned a General Education Development (GED) credential as a state-recognized equivalent to a regular high school diploma (if offered by the state), or other state-recognized equivalent (including recognized alternative standards for individuals with disabilities), or earned a proficiency credential, certificate, or degree, in conjunction with a secondary school diploma (if offered by the state) during the reporting year.</p> <p>Denominator: Number of CTE concentrators who left secondary education during the school year.</p>	State and Local Administrative Records	B: 80.00%	L: 80.00% A:	L: 80.00% A:
4S1 Student Graduation Rates 113(b)(2)(A)(iv)	<p>Numerator: Number of CTE concentrators who, in the reporting year, were included as graduated in the State's computation of its graduation rate as described in Section 1111(b)(2)(C)(vi) of ESEA.</p> <p>Denominator: Number of CTE concentrators who, in the reporting year, were included in the State's computation of its graduation rate as defined in the state's Consolidated Accountability Plan pursuant to Section 1111(b)(2)(C)(vi) of the ESEA.</p>	State and Local Administrative Records	B: 80.00%	L: 80.00% A:	L: 80.00% A:

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Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Indicator & Citation	Measurement Definition	Measurement Approach	Baseline 7/1/06- 6/30/07	Year One 7/1/07- 6/30/08	Year Two 7/1/08- 6/30/09
5S1 Secondary Placement 113(b)(2)(A)(v)	<p>Numerator: The number of CTE concentrators who left secondary education and were placed in postsecondary education or advanced training, in the military service, or employment in the second quarter following the program year in which they left secondary education (i.e. unduplicated placement status for CTE investors who graduated by June 30, 2007 would be assessed between October 1, 2007 and December 31, 2007).</p> <p>Denominator: Number of CTE concentrators who left secondary education during the reporting year.</p>	State and Local Administrative Records	B: 80.00%	L: 80.00% A:	L: 80.00% A:
6S1 Nontraditional Participation 113(b)(2)(A)(vi)	<p>Numerator: The number of CTE participants from underrepresented gender groups who participated in a program that leads to employment in nontraditional fields during the reporting year.</p> <p>Denominator: Number of CTE participants who participated in a program that leads to employment in nontraditional fields during the reporting year.</p>	State and Local Administrative Records	B: 10.00%	L: 10.00% A:	L: 10.00% A:
6S2 Nontraditional Completion 113(b)(2)(A)(vi)	<p>Numerator: Number of CTE concentrators from underrepresented gender groups who completed a program that leads to employment in nontraditional fields during the reporting year.</p> <p>Denominator: Number of CTE participants who completed a program that leads to employment in nontraditional fields during the reporting year.</p>	State and Local Administrative Records	B: 10.00%	L: 10.00% A:	L: 10.00% A:

4.13 Postsecondary/Adult Level Definition of Career and Technical Education Student Populations

CTE Participant – A postsecondary student who has enrolled in a CTE program.

CTE Concentrator – A postsecondary student who: (1) completes at least 12 academic or CTE credits within a single program area sequence that is comprised of 12 or more academic and technical credits and terminates in the award of an industry-recognized credential, a certificate, or a degree; or (2) completes a short-term CTE program sequence of less than 12 credit units that terminates in an industry-recognized credential, a certificate, or a degree.

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4.14 Final Agreed Upon Performance Levels Form (Faupl), Postsecondary/Adult Level

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Indicator & Citation	Measurement Definition	Measurement Approach	Baseline Indicate Year	Year One 7/1/07- 6/30/08	Year Two 7/1/08- 6/30/09
1P1 Technical Skill Attainment 113(b)(2)(B)(i)	Numerator: Number of CTE concentrators who passed technical skill assessments that are aligned with industry-recognized standards, if available and appropriate, during the reporting year. Denominator: Number of CTE concentrators who took technical skill assessments during the reporting year.	State/Local Administrative Data	B: Data not available until June 08	L: Not Required A:	L: 50.00% A:
2P1 Credential, Certificate, or Degree 113(b)(2)(B)(ii)	Numerator: Number of CTE concentrators who received, or were eligible to receive an industry-recognized credential, a certificate, or a degree and left postsecondary education during the reporting year. Denominator: Number of CTE concentrators who left postsecondary education during the reporting year.	State/Local Administrative Data	B: Date not available until June 08	L: Not Required A:	L: 60.00% A:

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<p align="center">3P1 Student Retention or transfer 113(b)(2)(B)(iii)</p>	<p>Numerator: Number of CTE concentrators who remained enrolled in their original postsecondary institution or transferred to another 2- or 4-year postsecondary institution during the reporting year and who were enrolled in postsecondary education in the fall of the previous reporting year and who did not earn and were</p> <p>Denominator: Number of CTE concentrators who were enrolled in postsecondary education in the fall of the previous reporting year and who did not earn and were not eligible to earn an industry-recognized credential, a certificate, or a degree in the previous reporting year.</p>	<p align="center">Administrative Record Exchange w/MTUSDW & NSC</p>	<p>B: Data not available until June 08</p>	<p>L: Not Required</p> <p>A:</p>	<p>L: 60%</p> <p>A:</p>
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<p align="center">4P1 Student Placement 113(b)(2)(B)(iv)</p>	<p>Numerator: Number of CTE concentrators who completed or were eligible to complete a CTE program and were placed or retained in employment, or placed in military service or apprenticeship programs in the 2nd quarter following the program year in which they left postsecondary education (i.e., unduplicated placement status for CTE concentrators who graduated by June 30, 2008 would be assessed between October 1, 2008 and December 31, 2008).</p> <p>Denominator: Number of CTE concentrators who completed or were eligible to complete a CTE program and left postsecondary education during the reporting year.</p>	<p>Administrative Record Exchange w/UI, FEDES & Trade Organizations</p>	<p>B: 72.85%</p>	<p>L: Not Required</p> <p>A:</p>	<p>L: 73.35</p> <p>A:</p>
<p align="center">5P1 Nontraditional Participation 113(b)(2)(B)(v)</p>	<p>Numerator: Number of CTE participants from underrepresented gender groups who participated in a CTE program that leads to employment in nontraditional fields during the reporting year.</p> <p>Denominator: Number of CTE participants who participated in a CTE program that leads to employment in nontraditional fields during the reporting year.</p>	<p>State/Local Administrative Data</p>	<p>B: 11.96%</p>	<p>L: Not Required</p> <p>A:</p>	<p>L: 12.00%</p> <p>A:</p>

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<p align="center">5P2 Nontraditional Completion 113(b)(2)(B)(v)</p>	<p>Numerator: Number of CTE concentrators from underrepresented gender groups who completed or were eligible to complete a CTE program that leads to employment in nontraditional fields during the reporting year.</p> <p>Denominator: Number of CTE concentrators who completed or were eligible to complete a CTE program that leads to employment in nontraditional fields during the reporting year.</p>	<p>State/Local Administrative Data</p>	<p>B: 11.83%</p>	<p>L: Not Required A:</p>	<p>L: 12.00% A:</p>
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V. TECH PREP PROGRAMS

5.1 Process for Awarding Tech-Prep Consortium

As noted in the introduction of the State Plan, Montana is launching an effort to move to a new organizational system for CTE, using a tiered approach involving six career fields, 16 career clusters, and a number of career pathways – called *Big Sky Pathways*.

A reformulated Tech Prep system, launched in Fall of 2007, will be a key player in Montana's updated CTE delivery system. The statewide Tech Prep consortium, known as the Big Sky Pathways Consortium, will take a leadership role in developing and supporting Big Sky Pathways with each of the Career Clusters.

Through a competitive process, one statewide Tech Prep consortium was created. Flathead Valley Community College is the lead institution for the Big Sky Pathways Consortium, and its partner from the eastern region of the state is Montana State University Billings College of Technology. This single consortium is designed to provide administrative leadership for Tech Prep; function as a clearinghouse for information and resources; designate other postsecondary institutions in the state to develop specific career clusters and related pathways; and provide the model for development of Big Sky Pathways (programs of study) for local Perkins projects. The consortium will utilize the following six Career Fields and their respective Tech Prep *Big Sky Pathways* for Montana:

- Agriculture and Natural Resources
- Engineering and Industrial Technology
- Health and Related Services
- Social and Human Services
- Business, Management and Information Systems
- Arts and Communications

To make this work, Montana established a **State CTE Executive Leadership Team** representing administrative leadership for secondary and postsecondary to provide oversight of Title I and Title II funds. Also, a State CTE Advisory Committee will be appointed in 2008 to provide consultation to the **State CTE Executive Leadership Team** and its staff. Its membership will represent state agencies, adult education, business and industry, teachers and faculty, counselors, administrators and community stakeholders.

5.2 Special Considerations for Tech Prep applications

Section 204(d) indicates that special consideration will be given to applications that –

1. *“provide for effective employment placement activities or the transfer of students to baccalaureate or advanced degree programs;*

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2. *are developed in consultation with business, industry, institutions of higher education, and labor organizations;*
3. *address effectively the issues of school dropout prevention and re-entry, and the needs of special populations;*
4. *provide education and training in an area or skill, including an emerging technology, in which there is a significant workforce shortage based on the data provided by the eligible entity in the state;*
5. *demonstrate how tech prep programs will help students meet high academic and employability competencies; and*
6. *demonstrate success in, or provide assurances of, coordination and integration with eligible recipients described in part C of title I.*

The grant award was based upon the potential of the applicant to create an effective Tech Prep program. It was important for the applicant to indicate:

- the extent to which career clusters and pathways have previously been developed at their institution thus enabling the institution to further develop programs of study;
- how the programs of study will lead to employment and/or degree programs;
- a clear design as to how business, industry, labor, institutions of higher education including 4-year institutions, secondary schools and other pertinent parties will be included in the work of developing programs of study;
- how the institution will address issues of drop-out prevention and serve the explicit needs of special populations;
- whether and where there are significant workforce shortages using national, state or regional employment trend data;
- how the grant will be used to help students achieve high academic and employability competencies such as those identified in industry standards and pertinent exit standards of student performance; and,
- how the grant will be fiscally managed.

5.3 Equitable Distribution among Tech Prep Consortium participants

For the purposes of Perkins IV implementation, all of Montana is rural. For this reason the grant applicant demonstrated its institution would deliver distance learning to enhance the work of the Tech Prep program and specifically contribute to the development of *Big Sky Pathways*.

5.4 Consortium Requirements

Consortium requirements are addressed through 5.4.1 to 5.4.8.

5.4.1 Required Articulation Agreements Among Consortium Participants

The Tech Prep grantee is required to develop articulation agreements. These articulation agreements will not be geographically oriented but instead will be organized around the Career Field/clusters/Big Sky Pathways. This new system of articulation will be statewide as applicable, and may result in multiple institutions of higher education having a shared articulation agreement with multiple secondary schools and allowing for (or requiring) transfer of credit among the participating postsecondary institutions.

5.4.2 Tech Prep Program of Study

OPI specialists are already assigned a specific number of secondary schools that they monitor. It will be the responsibility of the specialists to ensure that each school that participates in the consortium is also offering a qualified *Big Sky Pathway* that meets the criteria for section 203(c)(2)(A)-(G) of Title II of the Act as well as the general definition of Program of Study from Title I of the Act.

During the start-up year of the Big Sky Pathways Consortium, OCHE staff will coordinate its activities and provide technical assistance as necessary. Each of the statewide *Big Sky Pathways* will have a specific OPI/OCHE program specialist assigned to work with developing the programs within his/her expertise, e.g.: Health Sciences Specialist – health sciences Career Field and Cluster/Big Sky Pathways.

5.4.3 Funding Requirements

Section 203(c)(3) of Perkins IV states that all Tech Prep Grant applicants must:

- “(A) meet academic standards developed by the State;
- “(B) link secondary schools and 2-year postsecondary institutions, and if possible and practicable, 4-year institutions of higher education, through—
 - “(i) nonduplicative sequences of courses in career fields;
 - “(ii) the use of articulation agreements; and
 - “(iii) the investigation of opportunities for tech prep secondary education students to enroll concurrently in secondary education and postsecondary education coursework;
- “(C) use, if appropriate and available, work-based or worksite learning experiences in conjunction with business and all aspects of an industry; and
- “(D) use educational technology and distance learning, as appropriate, to involve all the participants in the consortium more fully in the development and operation of programs;

To meet these requirements, the Big Sky Pathways Consortium indicated how it will:

- Fashion *Big Sky Pathways* and related articulation agreements that are built upon secondary courses that are properly accredited and postsecondary courses that clearly carry out appropriately rigorous expectations and demands;

- Create articulation agreements that carefully align course content between secondary and postsecondary courses that are non-duplicative in nature;
- Create a specific plan for carrying out the articulation requirements in the particular consortium;
- Explain how dual enrollment opportunities will be created, how students will be determined eligible for participation in dual enrollment courses, and how these opportunities will be clearly communicated to teachers, secondary students and parents; and
- How opportunities for work-based or worksite learning will be made available, and what criteria will be created to ensure that work-based or worksite learning will meet program objectives and how employers will be engaged to participate in such activities.

5.4.4 Tech Prep In-service Professional Development

Perkins IV states that each Tech Prep program shall include in-service professional development for teachers, faculty, and administrators that:

- “(A) supports effective implementation of tech prep programs;
- “(B) supports joint training in the tech prep consortium;
- “(C) supports the needs, expectations, and methods of business and all aspects of an industry;
- “(D) supports the use of contextual and applied curricula, instruction, and assessment;
- “(E) supports the use and application of technology; and
- “(F) assists in accessing and utilizing data, information available pursuant to section 118, and information on student achievement, including assessments.

The consortium has provided details regarding the above requirement, keeping in mind that Perkins IV professional development requirements are more “in depth” than what was required in the prior legislation. In Montana some of this more intensive and sustained professional development is already in effect. It has been designed to assist secondary and to some degree postsecondary teachers and instructors through programs that are offered through several days of study in a variety of CTE fields and that lead to participants achieving industrial level standards of competency. State agencies may also make available funding from other Perkins funds to assist in enhancing this technical assistance and professional development.

5.4.5 Tech Prep Professional Development for Counselors

The professional development of school counselors has for some years been a priority of the Montana’s Tech Prep program. The new Tech Prep Consortium is expected to keep a strong focus on the continued professional development of school counselors and, where possible, attempt to assist in the preparation of new school counselors. Ways of addressing the career education elements of counselor development must be explicitly noted in meeting this requirement. Professional development requirements activities are offered in compliance with title I of Perkins IV will be closely coordinated with those efforts carried out under the Tech Prep program.

5.4.6 Assurance of Tech Prep Equal Access

Perkins IV gives extensive attention to the quality of educational and support services provided to special populations, including ensuring equal access to a full range of technical preparation programs. The Consortium will explicitly address how the needs of these special populations will be addressed using specific examples and methods. Activities under this section will be closely coordinated with activities and standards for equal access expressed in section 3.1.1 of this plan.

5.4.7 Preparatory Services

The Big Sky Pathways Consortium has identified how it will ensure that each articulated program offers preparatory services, including:

- Academic support services, offered during summer months and/or concurrently with program participation, to allow students to handle the challenging academic and technical skill content of *Big Sky Pathways*;
- Career exploration and career planning services, including the development of a personalized student plan for college and career, that allow students to make well informed decisions about transitions to postsecondary education and training and advancement to high-skill, high-wage employment; and
- Other supports, such as financial planning for college costs, college admissions, and support for employability skills, to help students, particularly those who are from economically disadvantaged background or facing other barriers, to succeed in secondary education and to advance to postsecondary education and to high-skill, high-wage employment.

5.4.8 Coordination of Tech Prep Programs

The major function of the Big Sky Pathways Consortium is the development of *Big Sky Pathways*. This is to be done in coordination with OPI/OCHE program specialists within prescribed cluster areas to inform the development of programs of study.

5.5 Consortium Agreement for Levels of Performance

The Big Sky Pathways Consortium will report data on the performance indicators under section 113(b) of the Act in coordination with the OCHE Data Specialist. For the purposes of title II, they will also gather and report the additional performance data on students who are enrolled in a *Big Sky Pathway* under the direct jurisdiction of the Consortium.

In Section 3(26) of the Act, a “secondary” Tech Prep student is “*one who has enrolled in two courses in the secondary education component of a tech prep program,*” and in Section 3(23), a “postsecondary” Tech Prep student is “*one who has completed the secondary component of a Tech Prep program; and has enrolled in the postsecondary component of a Tech Prep program.*”

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To gather data on these students at the secondary and postsecondary levels, participating secondary schools and postsecondary institutions consortium will need to provide this data to Flathead Valley Community College for incorporation into the State Database. Using these definitions of participating Tech Prep students, the consortium will gather and report data on the following indicators, using processes developed by the Partner Agencies:

- The number of secondary education tech prep students and postsecondary education tech prep students served.
- The number and percent of secondary education Tech Prep students enrolled in the Tech Prep program that
 - enroll in postsecondary education
 - enroll in postsecondary education in the same field or major as the secondary education tech prep students were enrolled at the secondary level;
 - complete a state or industry-recognized certification or licensure;
 - successfully complete, as a secondary school student, courses that award postsecondary credit at the secondary level; and
 - enroll in remedial mathematics, writing, or reading courses upon entering postsecondary education.
- The number and percent of postsecondary education tech prep students who-
 - Are placed in a related field of employment not later than 12 months after graduation from the tech prep program;
 - Complete a State or industry-recognized certification or licensure;
 - Complete a 2-year degree or certificate program within the normal time for completion of such program; and
 - Complete a baccalaureate degree program within the normal time for completion of such program.

This data will be transmitted to the Big Sky Pathways Consortium Project Director for review. Partner Agencies and Tech Prep consortium will determine existing sources that can be used for collection of data on the Tech Prep performance indicators, as well as for which indicators current data is non-existent or not sufficient.

Once specific definitions and measurement approaches have been selected, the consortium will begin gathering the new data in a pilot phase beginning with students who participate in *Big Sky Pathways* beginning in school year 2008-2009. Benchmark data will be established, to the extent possible, based on data gathered from students participating in or completing a secondary portion of a *Big Sky Pathways* in spring of 2009. Based on benchmark data, the Partner Agencies will negotiate performance targets with the Consortium for students due to complete the secondary portion of their Big Sky Pathway in Spring 2010. Performance targets will be renegotiated for school years 2011 and 2012, based on continuous improvement criteria. As soon as feasible, benchmark data will be collected for postsecondary program completers, and performance targets will be established.

VI. FINANCIAL REQUIREMENTS

6.1 Allocation of Funds under Section 111

Funds received through the allotment made under section 111 will be allocated among secondary and postsecondary Career and Technical Education.

Sections 131 and 132

Eighty-five percent (85%) of the funds will be allocated under Section 131 and Section 132. Ten percent (10%) of the eighty-five percent (8.5%) will be used in accordance with Section 112 (c)(Reserve).

Taking into account the Reserve Funds, the remainder of local funding will be allocated as follows: sixty-five percent (65%) will be allocated to secondary career and technical education and thirty-five percent (35%) will be allocated to postsecondary career and technical education.

This distribution of funds is a result of the consultation between OCHE and OPI, reflecting upon input given the State Plan Advisory Committee established under Montana Law (MCA 20-7-330). In the judgment of the Partner Agencies, this distribution is equitable and provides a reasonable allocation of scarce resources to provide quality CTE services. It is built upon a tradition of previous practice in Montana and also reflects the current policy direction of more closely aligning and connecting secondary and postsecondary CTE within Montana.

Reserve [Section 112]

Montana is retaining a 10 percent Reserve fund as allowed by the Perkins legislation. As the role of the **State CTE Executive Leadership Team** is to ensure coordination of Perkins activities across educational and workforce systems and to set priorities for activities that have a statewide impact and promote innovation in CTE programs and services, the **State CTE Executive Leadership Team**, in consultation with the State CTE Advisory Committee, will determine the priorities for allocation of the Reserve fund. The final decision will be the responsibility of the **State CTE Executive Leadership Team** as the fiscal and programmatic administrators of the Perkins grant.

The options available for consideration will meet the required and permissive uses listed in Section 135 of the Perkins legislation. The priorities may include: but not limited to: professional development, career and technical student organizations, skill assessments at the secondary and postsecondary level, curriculum and product development, integration of academic and career and technical knowledge and skills, use of technology, support for programs of study, and, services for special populations.

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Consideration of the Role of Montana-Based Non-Profit Organizations

In 2007, OCHE and OPI agreed to a Memorandum of Understanding by which \$360,000 was designated out of FY 2007 Reserve Funds to provide services, in accordance with the programmatic purposes of the Act, for activities to be carried out through eligible institutions directed to Montana-based non-profit organizations, with a focus on community-based organizations that have established ties at the community level). Six two-year awards were made to partnerships among eligible institutions and schools working with Montana-based non-profit organizations. .

Each recipient of the Reserve Funds will submit an interim report in summer 2008 by which the State CTE Executive Leadership Team will determine if sufficient progress has been made to warrant award of the second year of funding for each of the Recipients. Each Recipient will submit a final report on the project in late summer of 2009. The State CTE Executive Leadership Team will review the demonstrated effectiveness of these partnerships to determine if similar funding will be made available in future years of the Perkins Plan.

In accordance with the Memorandum of Understanding, this designation of Reserve Funds is only in effect during the Transition Year and through the biennium ending June 30, 2009.

The State is strongly committed to improving services for special populations and supporting the involvement of Montana-based non-profit organizations with established ties at the community level, where appropriate. Given the variety of priorities under the Perkins Act, the State CTE Executive Leadership Team believes a more flexible approach to annual decisions about the Reserve Funds is more appropriate than the current MOU would allow. Therefore, beginning with program year 2009-2010 through 2012-2013 (after the current MOU has expired), Montana will set aside \$180,000 on an annual basis (dependent upon the allocation of the federal funds) to support projects, on a competitive basis that develop and refine strategies to successfully serve special populations. In each application submitted by a school district, a postsecondary institution, or jointly between two or more such entities, the applicant must demonstrate that one or more Montana-based non-profit organizations were given the opportunity to play a significant role in the project.

State Leadership [Section 124]

Individuals in Institutions

As described in section 112(a)(2)(A) of the Act, up to 1 percent of the State's entire allocation may be set aside, from State Leadership Funds, to support CTE services in state institutions. Montana will make 0.5 percent of the State's Perkins state leadership allocation available to an agency, organization or institution serving individuals in state institutions. Funds will be awarded through a competitive grant or contract process.

Nontraditional Training and Employment

The amount to be made available under Section 112 (a)(2)(B) to support nontraditional training and employment services will be \$60,000. Funds will be allocated through a competitive RFP.

Remainder

After accounting for leadership funds expended for individuals in institutions and non-traditional services, the remaining state leadership funds will be allocated as follows: 50 percent for secondary (OPI) and 50 percent for postsecondary (OCHE). These funds will be used for the six remaining required uses of Section 124 and appropriate permissible uses.

State Administration [Section 121]

The amount to be expended for state administration under Section 112 (a)(3) is five (5.0) percent of the total grant, and a state match is required. These funds will be allocated as follows: 68 percent for secondary (OPI) and 32 percent for postsecondary (OCHE).

As required, an equal amount of state of Montana General Fund dollars will be expended for state administration under section 112(a)(3).

6.2 Allocations for Secondary CTE Programs

OPI shall distribute funds on an annual basis for secondary CTE programs to LEAs according to the following formula, as determined in the Perkins Act:

The total amount allocated for distribution for secondary education CTE (other than the Reserve Fund as noted in Section 6.1) will be \$2,759,391

Of this amount:

Seventy percent (70%) of the available funds shall be allocated to LEAs based on the census data for school system enrollment for the number of children in poverty aged 5-17 for the previous school year.

Thirty percent (30%) of the available funds shall be allocated to LEAs based on the AIM enrollment data for the number of children aged 5-17 for the previous school year.

6.3 Allocations for Postsecondary CTE Programs

The total amount allocated for distribution for postsecondary education CTE (other than the Reserve Fund as noted in Section 6.1) will be \$1,485,826 for current fiscal year.

Of this amount, funding for postsecondary programs is determined by dividing the number of Pell grant and Bureau of Indian Affairs program recipients enrolled in the two-year postsecondary institution by the total number of Pell Grant and Bureau of Indian Affairs program recipients in the state. Each two-year postsecondary institution must qualify for at least \$50,000 before a grant is awarded.

[Addendum: taxonomy of career and technical education programs that align with Board of Regent Policy 301.12]

6.4 Allocations among Consortia

Secondary

Section 131(f) of Perkins IV requires that a school district shall not receive an allocation unless the amount is greater than \$15,000. A school district may enter into a consortium with other local education agencies for the purposes of meeting the minimum allocation requirement. Discussion of consortium in this section is NOT the same as the consortium that some school districts may join as part of Tech Prep for participation in *Tech Prep Big Sky Pathways*.

OPI will strongly encourage school districts to join consortia, when it is feasible. However; a school district may request a waiver of the federal code and receive permission from the OPI to receive allocated funds without joining a consortium.

For eligible school districts with allocations of less than \$15,000 that apply to form consortia with other eligible school district, each consortium can include no more than five eligible recipients, and all consortium partners must be located in the same region of the state. When a consortium is formed, it must be through cooperative agreement and must operate programs that are of sufficient size, scope, and quality to be effective. If a consortium wants to include more than five eligible recipients, it must provide written justification why it will provide a stronger educational program for the students than if the eligible recipient were to join a different consortium. The proposal will be approved or disapproved by the state on a case by case basis, and the state's decision is not subject to further review.

When a consortium has been approved by the state, it shall submit one local plan that combines all school districts in the consortium. Guidance for the consortium will be contained in the instructions for the development of the local plan. When a school district has entered into a consortium for joint application of funds under this part and a dispute arises, the dissenting school district shall appeal first to the consortium's fiscal agent and then to the OPI, and finally the Montana Board of Regents. Each agreement shall be for a three year basis, but in any given year, consortium members will be allowed to withdraw from the agreement. If a school district wishes to leave a consortium, it may enter into a new consortium the following year.

Funds allocated to a consortium for this purpose shall be used only for purposes and programs that are mutually beneficial to all members of the consortium and can be used only for programs authorized under this title. Such funds may not be reallocated to individual members of the consortium for purposes or programs benefiting only one member of the consortium.

6.5 Adjustment of Data for District Boundary Changes

If any changes in school district boundaries have occurred since the population and/or enrollment data was collected, OPI will use previous enrollment data from the school districts affected by a boundary change and consult with the affected school district officials, to ascertain how the change in boundaries may have impacted enrollment patterns. OPI will not need to consider the enrollment impact of creation of charter schools, since in Montana, charter schools can only be

created within an existing school district. OPI will use these sources of information to develop a formula for allocation of funds to affected districts.

6.6 Proposed Alternative Allocations

Montana will not propose an alternative allocation formula.

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6.7. Perkins IV Budget Table – Program Year 2

Estimates calculated from amounts posted to web by Budget Services 02/05/07 - DRAFT
(For Federal Funds to Become Available Beginning on July 1, 2007)

I. TITLE I: CAREER AND TECHNICAL EDUCATION ASSISTANCE TO STATES

A. Total Title I Allocation to the State	\$ 5,549,303
B. Amount of Title II Tech Prep Funds to Be Consolidated with Title I Funds	<u>\$ 0.00</u>
C. Total Amount of Combined Title I and Title II Funds to be distributed under section 112 (<i>Line A + Line B</i>)	\$ 5,549,303
D. Local Formula Distribution (<i>not less than 85%</i>) (<i>Line C x ___%</i>)	\$ 4,716,908
1. Reserve (<i>not more than 10% of Line D</i>)	\$ 471,691
a. Secondary Programs (<i>___% of Line D</i>)	\$ _____
b. Postsecondary Programs (<i>___% of Line D</i>)	\$ _____
2. Available for formula allocations (<i>Line D minus Line D.1</i>)	\$4,245,217
a. Secondary Programs (<i>_65_ % of Line D.2</i>)	\$ 2,759,391
b. Postsecondary Programs (<i>35___% of Line D.2</i>)	\$ 1,485,826
E. State Leadership (<i>not more than 10%</i>) (<i>Line C x ___%</i>)	\$ 554,930
1. Nontraditional Training and Employment (\$60,000)	
2. Corrections or Institutions (\$27,74)	
F. State Administration (<i>not more than 5%</i>) (<i>Line C x _5_ %</i>)	\$ 277,465
G. State Match (<i>from non-federal funds</i>) ³	\$ 278,767

³ The eligible agency must provide non-Federal funds for State administration of its Title I grant in an amount not less than the amount it provided in the preceding year.

6.8 Consortia Allocations

No consortia have been formed as of the submission of the Multi-Year Plan.

6.9 Secondary and Postsecondary Formulas

Section 6.1, 6.2, and 6.3 include the descriptions of these formulas.

6.10 Award of Reserve Funds

Funds distributed under section 112(c), the Reserve Fund may be awarded to eligible recipients for CTE activities described in Section 135. The **State CTE Executive Leadership Team**, with input from the State CTE Advisory Committee and staff, will annually develop priorities for use of the Reserve funds by eligible recipients. Use of the Reserve funds will be targeted to help eligible recipients carry out key priorities of the state, such as identifying promising practices for improving performance in the Performance Indicators, creating effective assessments instruments, identifying content standards for CTE programs, improving professional development and teacher recruitment and retention, and strengthening services to special populations. As referenced in 6.1 Reserve (Section 112), beginning with program year 2009-2010 through 2012-2013, Montana will set aside \$180,000 of the Reserve Fund on an annual basis (dependent upon the allocation of the federal funds) to support projects that serve special populations.

6.11 Ranking Eligible Recipients

Criteria for awarding grants to eligible recipients will be determined on an annual basis, and will be awarded to applicants who, in the judgment of application reviewers using a scoring rubric created by the **State CTE Executive Leadership Team**, are best able to meet the objectives of the grant application.

6.12 Rural and Sparsely Populated Areas

All eligible recipients in Montana meet the definition of rural and sparsely populated areas. No special procedures for determining eligible recipients will be used.

VII. CERTIFICATIONS AND ASSURANCES

7.1 EDGAR Certifications

In accordance with 34. CFR 76.104 of the Education Department General Administrative Regulations (EDGAR), the Montana Board of Regents of Higher Education assures that:

1. The transition plan is submitted by the state agency that is eligible to submit the plan. [34 CFR 76.104(a)(1)]
2. The state agency has authority under state law to perform the functions of the state under the program. [34 CFR 76.104(a)(2)]
3. The state legally may carry out each provision of the plan. [34 CFR 76.104(a)(3)]
4. All provisions of the plan are consistent with state law. [34 CFR 76.104(a)(4)]
5. A state officer, specified by title in the certification, has authority under state law to receive, hold, and disburse federal funds made available under this plan. [34 CFR 76.104(a)(5)]
6. The state officer who submits the transition plan, specified by title in the certification, has authority to submit the plan. [34 CFR 76.104(a)(6)]
7. The agency that submits the plan has adopted or otherwise formally approved the plan for state operation and administration of the program. [34 CFR 76.104(a)(8)]



Lynn Morrison-Hamilton
Montana Board of Regents of Higher Education

March 27, 2008
Date



Sheila Stearns Ed.D.
Commissioner of Higher Education

March 27, 2008
Date

7.2 Additional Assurances

1. State Intergovernmental Review Process

The State assures that a copy of the state plan has been submitted into the state Intergovernmental Review Process. [Executive Order 12372; 34 CFR 79]

2. Compliance with State Plan and financial audit

The state assures that it will comply with the requirements of the Act and the provisions of the state plan, including the provision of a financial audit of funds received under the Act which may be included as part of an audit of other federal or state programs. [Section 122(c)(11)]

3. Regarding direct financial benefit from equipment acquisition

The state assures that none of the funds expended under the Act will be used to acquire equipment (including computer software) in any instance in which such acquisition results in a direct financial benefit to any organization representing the interests of the acquiring entity or the employees of the acquiring entity, or any affiliate of such an organization. [Section 122(c)(12)]

4. Waiver of Minimum Allocation Requirement

The state assures that it will waive the minimum allocation as required in section 131(c)(1) in any case in which the local educational agency is located in a rural, sparsely populated area or is a public charter school operating secondary school career and technical education programs and demonstrates that it is unable to enter into a consortium for purposes of providing services under the Act. [Section 131(c)(2)]

5. Non-federal sources for administration match

The state assures that it will provide, from non-federal sources, for the costs the eligible agency incurs for the administration of programs under this Act, an amount that is not less than the amount provided by the eligible agency from non-federal sources for such costs for the preceding fiscal year. [Section 323(a)]

6. Participation in in-service and pre-service professional development programs

The states assures that it and eligible recipients that use funds under this Act for in-service and pre-service career and technical education professional development programs for career and technical education teachers, administrators, and other personnel shall, to the extent practicable, upon written request, permit the participation in such programs of career and technical education secondary school teachers, administrators, and other personnel in nonprofit private schools offering career and technical secondary education programs located in the geographical area served by such eligible agency or eligible recipient. [Section 317(a)]

7. Meaningful participation of secondary students attending nonprofit private schools

The state assures that, except as prohibited by state or local law, an eligible recipient may, upon written request, use funds made available under this Act to provide for the meaningful participation, in career and technical education programs and activities receiving funds under this

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Act, of secondary school students attending nonprofit private schools who reside in the geographical area served by the eligible recipient. [Section 317(b)(1)]

8. Consultation with representatives of nonprofit private schools

The state assures that eligible recipients that receive an allotment under this Act will consult, upon written request, in a timely and meaningful manner with representatives of nonprofit private schools in the geographical area served by the eligible recipient regarding the meaningful participation, in career and technical education programs and activities receiving funding under this Act, of secondary school students attending nonprofit private schools. [Section 317(b)(2)]



Lynn Morrison-Hamilton
Montana Board of Regents of Higher Education

March 27, 2008
Date



Sheila Stearns Ed.D.
Commissioner of Higher Education

March 27, 2008
Date

VIII. APPENDICES

1. Certifications

Regarding Lobbying; Debarment,
Suspension And Other Responsibility Matters; And Drug-Free Workplace Requirements

**CERTIFICATIONS REGARDING LOBBYING; DEBARMENT, SUSPENSION AND OTHER
RESPONSIBILITY MATTERS; AND DRUG-FREE WORKPLACE REQUIREMENTS**

Applicants should refer to the regulations cited below to determine the certification to which they are required to attest. Applicants should also review the instructions for certification included in the regulations before completing this form. Signature of this form provides for compliance with certification requirements under 34 CFR Part 82, "New Restrictions on Lobbying," and 34 CFR Part 85, "Government-wide Debarment and Suspension (Nonprocurement) and Government-wide Requirements for Drug-Free Workplace (Grants)." The certifications shall be treated as a material representation of fact upon which reliance will be placed when the Department of Education determines to award the covered transaction, grant, or cooperative agreement.

MONTANA MULTI-YEAR STATE PLAN 2008-12

1. LOBBYING

As required by Section 1352, Title 31 of the U.S. Code, and implemented at 34 CFR Part 82, for persons entering into a grant or cooperative agreement over \$100,000, as defined at 34 CFR Part 82, Sections 82.105 and 82.110, the applicant certifies that:

(a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the making of any Federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal grant or cooperative agreement;

(b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;

(c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subgrants, contracts under grants and cooperative agreements, and subcontracts) and that all subrecipients shall certify and disclose accordingly.

2. DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS

As required by Executive Order 12549, Debarment and Suspension, and implemented at 34 CFR Part 85, for prospective participants in primary covered transactions, as defined at 34 CFR Part 85, Sections 85.105 and 85.110--

A. The applicant certifies that it and its principals:

(a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;

(b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

(c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (2)(b) of this certification; and

(d) Have not within a three-year period preceding this application had one or more public transaction (Federal, State, or local) terminated for cause or default; and

B. Where the applicant is unable to certify to any of the statements in this certification, he or she shall attach an explanation to this application.

3. DRUG-FREE WORKPLACE (GRANTEES OTHER THAN INDIVIDUALS)

As required by the Drug-Free Workplace Act of 1988, and implemented at 34 CFR Part 85, Subpart F, for grantees, as defined at 34 CFR Part 85, Sections 85.605 and 85.610 -

A. The applicant certifies that it will or will continue to provide a drug-free workplace by:

(a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;

(b) Establishing an on-going drug-free awareness program to inform employees about:

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- (1) The dangers of drug abuse in the workplace;
- (2) The grantee's policy of maintaining a drug-free workplace;
- (3) Any available drug counseling, rehabilitation, and employee assistance programs; and
- (4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
- (c) Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph (a);
- (d) Notifying the employee in the statement required by paragraph (a) that, as a condition of employment under the grant, the employee will:
 - (1) Abide by the terms of the statement; and
 - (2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;
- (e) Notifying the agency, in writing, within 10 calendar days after receiving notice under subparagraph (d)(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to: Director, Grants Policy and Oversight Staff, U.S. Department of Education, 400 Maryland Avenue, S.W. (Room 3652, GSA Regional Office Building No. 3), Washington, DC 20202-4248. Notice shall include the identification number(s) of each affected grant;
- (f) Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph (d)(2), with respect to any employee who is so convicted:
 - (1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
 - (2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;
- (g) Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (a), (b), (c), (d), (e), and (f).

B. The grantee may insert in the space provided below the site(s) for the performance of work done in connection with the specific grant:

Place of Performance (Street address, city, county, state, zip code)

Check if there are workplaces on file that are not identified here.

MONTANA MULTI-YEAR STATE PLAN 2008-12

DRUG-FREE WORKPLACE (GRANTEES WHO ARE INDIVIDUALS)

As required by the Drug-Free Workplace Act of 1988, and implemented at 34 CFR Part 85, Subpart F, for grantees, as defined at 34 CFR Part 85, Sections 85.605 and 85.610-

A. As a condition of the grant, I certify that I will not engage in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance in conducting any activity with the grant; and

B. If convicted of a criminal drug offense resulting from a violation occurring during the conduct of any grant activity, I will report the conviction, in writing, within 10 calendar days of the conviction, to: Director, Grants Policy and Oversight Staff, Department of Education, 400 Maryland Avenue, S.W. (Room 3652, GSA Regional Office Building No. 3), Washington, DC 20202-4248. Notice shall include the identification number(s) of each affected grant.

As the duly authorized representative of the applicant, I hereby certify that the applicant will comply with the above certifications.

NAME OF APPLICANT NAME	PR/AWARD NUMBER AND / OR PROJECT
PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE	
SIGNATURE	DATE

MONTANA MULTI-YEAR STATE PLAN 2008-12

Appendix 2

2. Non-Construction Programs Assurances

OMB Approval No. 0348-0040

ASSURANCES - NON-CONSTRUCTION PROGRAMS

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0040), Washington, DC 20503

PLEASE DO NOT RETURN YOUR COMPLETED FORM TO THE OFFICE OF MANAGEMENT AND BUDGET. SEND IT TO THE ADDRESS PROVIDED BY THE SPONSORING AGENCY.

Note: Certain of these assurances may not be applicable to your project or program. If you have questions, please contact the awarding agency. Further, certain Federal awarding agencies may require applicants to certify to additional assurances. If such is the case, you will be notified.

As the duly authorized representative of the applicant I certify that the applicant:

1. Has the legal authority to apply for Federal assistance, and the institutional, managerial and financial capability (including funds sufficient to pay the non-Federal share of project cost) to ensure proper planning, management, and completion of the project described in this application.
2. Will give the awarding agency, the Comptroller General of the United States, and if appropriate, the State, through any authorized representative, access to and the right to examine all records, books, papers, or documents related to the award; and will establish a proper accounting system in accordance with generally accepted accounting standards or agency directives.
3. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.
4. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding agency.
5. Will comply with the Intergovernmental Personnel Act of 1970 (42 U.S.C. §§4728-4763) relating to prescribed standards for merit systems for programs funded under one of the 19 statutes or regulations specified in Appendix A of OPM's Standards for a Merit System of Personnel Administration (5 C.F.R. 900, Subpart F).
6. Will comply with all Federal statutes relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U.S.C. §§ 6101-6107), which prohibits discrimination on the basis of age; (e) the Drug Abuse Office and Treatment Act of 1972 (P.L. 92-255), as amended, relating to nondiscrimination on the basis of drug abuse; (f) the Comprehensive Alcohol Abuse and Alcoholism Prevention, Treatment and Rehabilitation Act of 1970 (P.L. 91-616), as amended, relating to nondiscrimination on the basis of alcohol abuse or alcoholism; (g) §§ 523 and 527 of the Public Health Service Act of 1912 (42 U.S.C. §§ 290 dd-3 and 290 ee 3), as amended, relating to confidentiality of alcohol and drug abuse patient records; (h) Title VIII of the Civil Rights Act of 1968 (42 U.S.C. § 3601 et seq.), as amended, relating to nondiscrimination in the sale, rental or financing of housing; (i) any other nondiscrimination provisions in the specific statute(s) under which application for Federal assistance is being made; and (j) the requirements of any other nondiscrimination statute(s) which may apply to the application.
7. Will comply, or has already complied, with the requirements of Titles II and III of the uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (P.L. 91-646) which provide for fair and equitable treatment of persons displaced or

MONTANA MULTI-YEAR STATE PLAN 2008-12

whose property is acquired as a result of Federal or federally assisted programs. These requirements apply to all interests in real property acquired for project purposes regardless of Federal participation in purchases.

8. Will comply, as applicable, with the provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7328) which limit the political activities of employees whose principal employment activities are funded in whole or in part with Federal funds.
9. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874) and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§ 327-333), regarding labor standards for federally assisted construction subagreements.
10. Will comply, if applicable, with flood insurance purchase requirements of Section 102(a) of the Flood Disaster Protection Act of 1973 (P.L. 93-234) which requires recipients in a special flood hazard area to participate in the program and to purchase flood insurance if the total cost of insurable construction and acquisition is \$10,000 or more.
11. Will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in floodplains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. §1451 et seq.); (f) conformity of Federal actions to State (Clear Air) Implementation Plans under Section 176(c) of the Clear Air Act of 1955, as amended (42 U.S.C. §7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205).
12. Will comply with the Wild and Scenic Rivers Act of 1968 (16 U.S.C. §1721 et seq.) related to protecting components or potential components of the national wild and scenic rivers system.
13. Will assist the awarding agency in assuring compliance with Section 106 of the National Historic Preservation Act of 1966, as amended (16 U.S.C. §470), EO 11593 (identification and protection of historic properties), and the Archaeological and Historic Preservation Act of 1974 (16 U.S.C. §469a-1 et seq.).
14. Will comply with P.L. 93-348 regarding the protection of human subjects involved in research, development, and related activities supported by this award of assistance.
15. Will comply with the Laboratory Animal Welfare Act of 1966 (P.L. 89-544, as amended, 7 U.S.C. §2131 et seq.) pertaining to the care, handling, and treatment of warm blooded animals held for research, teaching, or other activities supported by this award of assistance.
16. Will comply with the Lead-Based Paint Poisoning Prevention Act (42 U.S.C. §4801 et seq.) which prohibits the use of lead-based paint in construction or rehabilitation of residence structures.
17. Will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act Amendments of 1996 and OMB Circular No. A-133, Audits of States, Local Governments, and Non-Profit Organizations.≡
18. Will comply with all applicable requirements of all other Federal laws, executive orders, regulations and policies governing this program.

SIGNATURE OF AUTHORIZED CERTIFYING OFFICIAL	TITLE
APPLICANT ORGANIZATION	DATE SUBMITTED

Standard Form 424B (Rev. 7-97)

Appendix 3,

3. Montana Career and Technical Education (CTE) Leadership Structure

Introduction

The purpose of this structure is to provide collaborative state level leadership that will implement the six year State Plan for the Carl D. Perkins Career and Technical Education Act, 2006 (Perkins IV). This will enable the eligible agency, the Board of Regents, and the Office of Public Instruction to mutually establish priorities that will move career and technical education from a traditional model to one that can produce the workforce that has the skill sets required for a technological global economy.

State CTE Executive Leadership Team

The role of the **State CTE Executive Leadership Team** is to ensure coordination of Perkins activities across educational and workforce systems; set priorities for activities that have a statewide impact and promote innovation in CTE programs and services.

The Leadership Team represents the administrative branch of the Office of Commissioner of Higher Education, Workforce Development Unit for the Board of Regents [the eligible agency for the administration of the Carl D. Perkins funds in Montana] and the administrative branch of the Office of Public Instruction, Division of Career and Technical Education (CTE). The fiscal and administrative responsibility for the Perkins funds lies with these agencies; therefore, it is the decision-making level within this structure.

State CTE Advisory Committee

This **State CTE Advisory Committee** serves in an advisory capacity to the **State CTE Executive Leadership Team**.

- Business/Industry representative of the Career Fields and Clusters Model (Appendix #7)

Program Staff

Program staffs function as liaisons to the eligible recipients, **State CTE Executive Leadership Team** and agency administration.

OCHE Program Staff	OPI Program Specialists
<ul style="list-style-type: none"> • Program Specialist (2) • Grant Management/Data Specialist • Federal Accountant 	<ul style="list-style-type: none"> • Business and Marketing • Health Sciences • Family and Consumer Sciences • Industrial Technology • Agriculture Sciences • Data Specialist

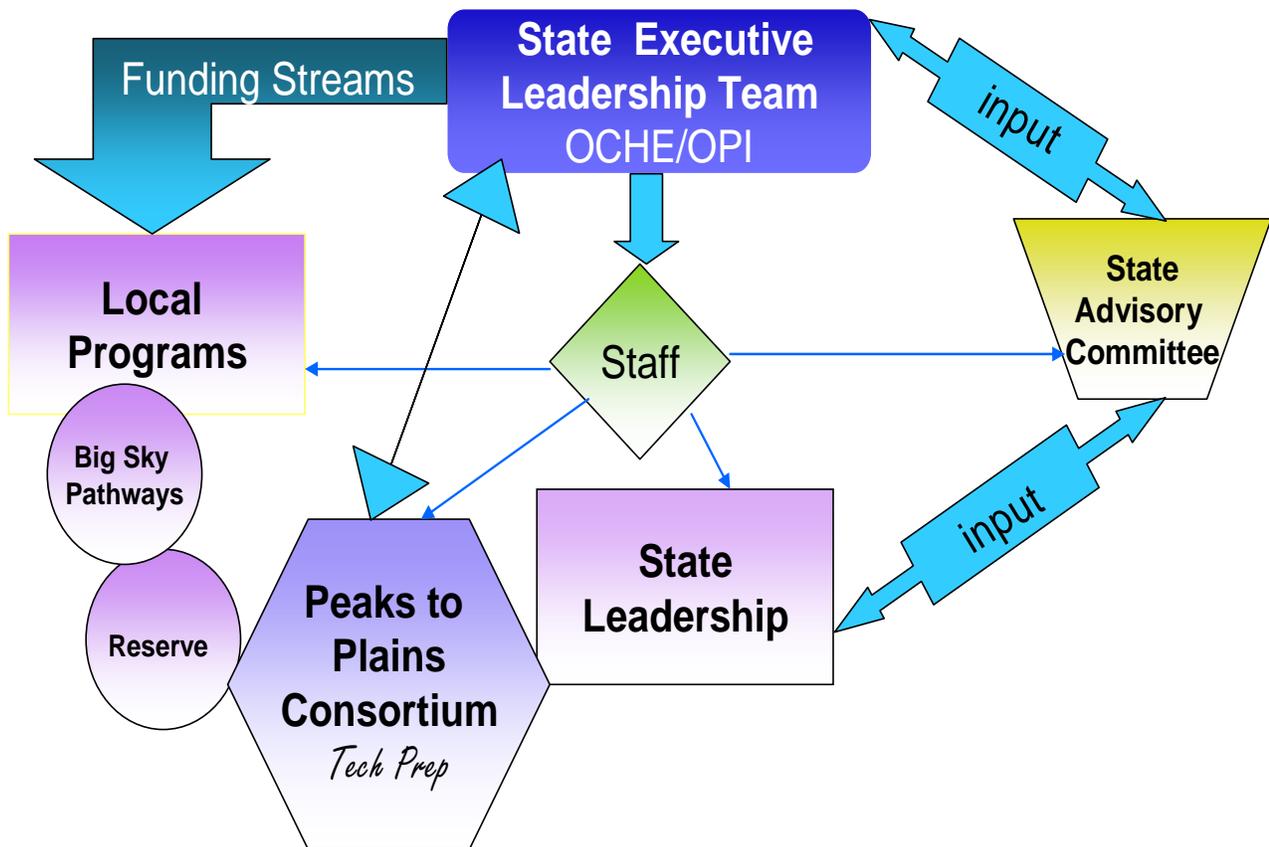
Funding Categories

The **State CTE Executive Leadership Team** in consultation with the State CTE Advisory Committee and staff will assure coordination of Perkins activities that have statewide impact within the following funding categories.

- **Local Programs**— Title I—eligible recipients [secondary and postsecondary] receive 90% of the 85% local funds on a formula basis.
- **Reserve**—10% of the 85% to be reserved for targeting priorities established through the State CTE Leadership Board in consultation with CTE Advisory Committee and Staff
- **Tech Prep**—Title II—7% administration funds reserved at state level (OCHE); remaining funds competitively awarded to a statewide consortium.
- **State Leadership**—10% of the Perkins funds are reserved for State Leadership activities with no less than \$60,000 dedicated to Nontraditional activities and no less that .5% for serving individuals in institutions. The remaining funds are dedicated for required uses, technical assistance and liaison activities at the national level.

In addition, the administrative category remains within the oversight of each agency (OPI and OCHE) to meet their respective fiscal and reporting responsibilities. As the eligible agency, the OCHE has the overall responsibility for administration of Carl D. Perkins funds in Montana.

Perkins Leadership Structure



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Appendix 4

4. Section II A (e), Postsecondary programs

Programs grouped program table			
Career Cluster	CIP Code	Program	# of Institutions
01	03.0201	Natural Resource Management	1
01	15.0506	Water Quality Tech.-Environ. Health	1
01	15.0901	Underground Miner	1
01	15.0903	Process Plant Technology	1
01	03.0101	Environmental Science	1
01	01.0101	Agribusiness	7
01	01.9999	Agricultural Mechanics Tech	2
01	03.0599	Natural Resources Management	4
01	01.0204	Agricultural Technology	2
02	46.0501	Plumbing	1
02	46.0503	Plumbing Technology	1
02	46.0401	Building Maintenance Engineering	1
02	15.1001	Construction Technology	4
02	47.0201	Heating, Ventilation & Air Cond. Technology	2
02	46.0302	Electrical Technology	1
02	46.0201	Building Trades	6
02	15.1302	Drafting CAD Technician	1
02	15.1301	Design Drafting Technology	6
02	46.0499	Building Maintenance	5
03	50.0701	Visual Fine Arts	1
03	50.0713	Professional Goldsmithing	3
03	56.0605	Power Plant Technology	5
03	50.0402	Graphic Design	1
03	52.0411	Call Center	2
04	51.0703	Dental Receptionist	2
04	51.0710	Office Technology/ Medical Office Specialist	3
04	51.0714	Medical Billing Specialist	1
04	51.0716	Medical Administrative Assistant	1
04	13.1003	Resource Interpretation	1
04	51.1401	Business Management	1
04	06.0101	Business Management-Occupational	2
04	52.0402	Office Technology- Executive/Administrative Assistant	8
04	52.1099	Accounting Technology/ Human Resource Option	1
04	52.1001	Human Resources Management	2
04	52.0408	Office Support - General Office Assistant	5
04	52.0407	Word Processing	5

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Programs grouped program table			
Career Cluster	CIP Code	Program	# of Institutions
04	52.0403	Legal Assisting	4
04	52.0406	Office Reception	1
04	52.0401	Office Support - Legal Receptionist	23
04	52.0301	Accounting Technology	3
04	52.0299	Business Technology	2
04	52.0207	Customer Service	1
05	13.0499	Early Childhood Education	1
05	13.1210	Early Childhood Education	2
05	13.1501	Paraprofessional Education	2
05	24.0102	Early Childhood Education, A.A.	2
06	52.0399	Accounting Assistant	1
06	52.0302	Accounting Technology	15
08	51.1004	Medical Laboratory Technology	1
08	43.0203	Emergency Services - Fire & Rescue Technology	3
08	51.9999	Surgical Technology	1
08	51.0908	Respiratory Care	2
08	51.1614	Behavioral Health Nurse Assistant	3
08	52.0932	Hospitality Management	1
08	51.1613	Nursing, Practical	8
08	51.0602	Dental Hygiene	1
08	51.1601	Nursing, ASN	5
08	51.0707	Health Information Technology	7
08	51.0708	Medical Office Technology	4
08	51.0911	Radiologic Technology	2
08	51.0713	Medical Coding	2
08	51.0909	Surgical Technology	4
08	51.0801	Medical Assistant	5
08	51.0803	Occupational Therapy Asst	1
08	51.0805	Pharmacy Technology	1
08	51.0806	Physical Therapist Assistant	1
08	51.0907	Radiologic Technology	2
08	51.0601	Dental Assistant	3
09	52.0901	Hospitality Management Services	1
09	52.0902	Customer Relations	1
09	52.0905	Food Service Management	1
09	31.0599	Wellness Exercise Leadership	3
09	12.0599	Culinary Arts	1
09	12.0505	Culinary Arts	1
09	52.0999	Hospitality	2

MONTANA MULTI-YEAR STATE PLAN 2008-12

Programs grouped program table			
Career Cluster	CIP Code	Program	# of Institutions
09	12.0503	Culinary Arts	1
09	52.0208	Business E-Commerce	1
10	51.1501	Substance Abuse Counseling	3
10	44.0201	Community Service	2
10	44.0701	Human Services & Juvenile Corrections	1
10	51. Appendix 1503	Human Services	1
10	51.1599	Human Services	3
11	11.0701	Digital Arts and Design, Certificate of Completion	2
11	52.1200	Computer Technology/Networking Technology	1
11	11.9999	IT Skills Proficiency:Internetworking	2
11	11.0301	Computer Information Technology - Network Support	14
11	11.0801	Multimedia Specialist	1
11	11.0401	Computer Information Systems	3
11	11.0103	Information Technology/Network Technician	2
11	11.0901	Computer Networking Technology	2
11	51.1299	Computer Technology	1
11	52.1201	Business Data Processing	4
11	11.0201	Computer Technology	6
11	11.0101	Networking Technology	12
12	22.0399	Tribal Law & Justice Assistant	1
12	43.0102	Correctional Officers	1
12	43.0103	Tribal Law and Justice	1
12	43.0104	Criminal Justice	1
12	43.0107	Law Enforcement	4
12	43.0199	Tribal Law & Justice	1
12	51.0904	Emergency Services - EMT-Paramedic	5
13	12.0504	Food Service Management	1
13	15.0611	Metals Technology	1
13	15.0508	Hazardous Materials/Waste Technician	2
13	15.0303	Electronics Technology	3
13	15.0201	Land Surveying	1
13	15.0399	Electronics Technology	1
13	47.0106	Major Appliance Repair Technology	1
13	15.1203	Internetworking Specialist/Prof - Service Tech	1
13	15.9999	Engineering Technology	7
13	48.0501	Welding/Metals Fabrication Technology	4
13	48.0599	Metals Technology	1
13	48.0508	Welding Technology	6
13	48.0503	Metal Fabrications Technology	1

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Programs grouped program table			
Career Cluster	CIP Code	Program	# of Institutions
13	47.0105	Electronics Technology	3
14	12.0402	Barber Styling	1
14	50.0408	Interior Design	1
14	52.1401	Management	3
14	52.1499	Marketing	2
15	15.1102	Computer Technology/Geographic Information Systems	5
15	41.0101	Bioscience Technology - Research Lab Tech	3
15	30.1101	Gerontology	1
15	3.0103	Environmental Science, A.S.	1
16	49.0101	Aviation Science & Technology	1
16	47.0607	Aviation Maintenance Technology	1
16	49.0202	Heavy Equipment Operation	1
16	15.0803	Automotive Technology	4
16	47.0613	Diesel Equipment Technology, Power Generation	1
16	47.0606	Recreational Power Equipment	1
16	47.0605	Diesel Technology	10
16	47.0604	Automotive Technology	8
16	47.0603	Auto Body Repair/Refinish	6
16	47.0302	Heavy Equipment	1
16	49.0299	Railroad Maintenance & Operations	4
40	52.0404	Medical Office Technology	4
8	51.1699	Registered Nursing	1
99	52.0101	Fundamentals of Business	6
99	52.0201	Business Mgmt/Entrepren	13
99	52.0701	Creative Arts Entrepreneurship	1

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Appendix 5

5. Special Populations Promising Practices Initiative

- How Big Sky Pathway plans of study can be customized to identify supportive services and additional opportunities that special populations students will benefit from;
- How Big Sky Pathways can be adapted and offered to adult learners, particularly those who are part of special populations;
- How information about BSPs and other CTE programs can be targeted in career counseling for special populations students;
- How academic assessments, career interest inventories, and information about local and regional employment outlook information can be integrated into career and admissions counseling for special populations students;
- How regular support group meetings for special populations students can assist with retention;
- How marketing resources can be targeted to special populations in advertisements catalogues and course listings;
- How community-based organizations and other groups that work with two-year postsecondary institutions and school districts can develop collaborative services to help special populations experience a higher degree of success in the Perkins Performance Indicators and other metrics;
- How professional development can be offered to teachers and faculty to help them effectively work with and teach special populations students;
- How voluntary self-disclosure processes at the postsecondary level can be made more consistent and effective in identifying special populations students to receive services;
- How all school and college counselors can provide more effective counseling and guidance for special populations students;
- How financial aid and scholarship information can be made available to special populations students, including those who are economically disadvantaged, so they can understand opportunities for financing postsecondary education;
- How financial literacy/money management training can be provided for students, especially those receiving financial aid and who are economically disadvantaged or face other barriers;
- How information about additional scholarship funds can be made more readily available and/or targeted to special populations students;
- How information from national organizations (i.e. The National Alliance for Partnerships in Equity, Inc. (NAPE) and Women Work! The National Network for Women's Employment) can inform practices and policies in Montana;
- How outreach and recruiting activities for students in special populations can be better coordinated between secondary schools and two-year postsecondary institutions, particularly with respect to federal student record privacy concerns;
- How career planning orientation, assessment, life skills and job readiness workshops, small group meetings, counseling and tutoring services for special populations can be integrated into CTE programs that provide challenging academic content and relevant career and technical education content; and
- How materials about Big Sky Pathways, and other relevant resources and counseling, can be provided to students with limited English Proficiency, addressing language barriers.

Appendix 6

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6. Criteria for Montana's High-Skill, High-Wage or High-Demand Occupations

High Skill Occupation:

The occupation requires completion of an associate degree, postsecondary career technical education, more than 12 months of on-the-job training, or a combination of work and formal training; **or**,

At least half of the 10 basic O*NET skills for this occupation are ranked at or above 50% in importance and at least 5 of the other O*NET skills required for this occupation are at or above 50% in importance.

High Demand Occupation:

The occupation has a greater than average projected annual job growth rate for Montana (1.6% using 2004-2014 projections); **or**

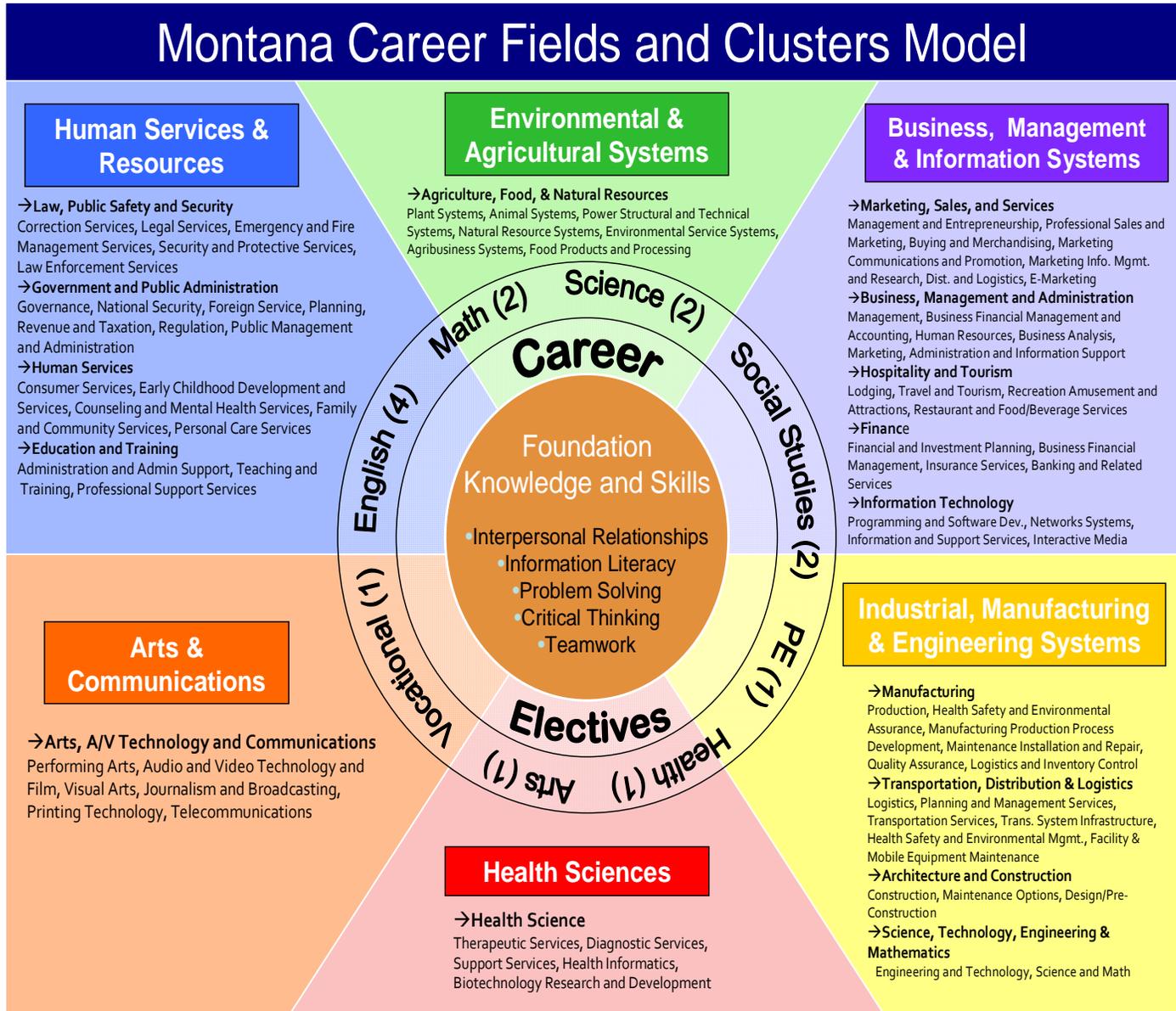
The occupation has at least 50 annual average job openings *in Montana*.

High Wage Criteria:

The occupation has an average annual wage which is greater than the wage at the 75th percentile (\$39,615 in 2006) for occupations in the state of Montana.

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7. Montana Career Fields and Clusters Model



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Appendix 8

8. Postsecondary Local Application Database Screen

The database is web accessible using a Citrix server. Because of student information contained in the database, web access is available to only those who have security clearance.

The screenshot shows a web application interface titled "Perkins IV Grant and Student Information Database". At the top, there is a navigation bar with four tabs: "Grant Forms", "Grant Reports", "Student Data Forms", and "Student Data Reports". Below the navigation bar, the main content area lists several steps for the grant application process:

- Grants: Step 1** | Enter all requests or suggestions for the Annual Perkins Priorities list.
- Under Construction** | Prioritize all advisory council and other suggestions for the Annual Perkins Priority Assessment
- Grants: Step 3** | Enter basic grant demographic information
- Grants: Step 4** | Enter Performance Indicators & planned Activities to meet the performance indicator goals
- Grants: Step 5** | Enter personnel to be funded by Perkins
- Grants: Step 6** | Enter budget line items by prioritized indicator for this grant

Montana Local Application Grant Main Menu

Montana grantees will be given secure access to the Perkins IV website. This website will be where their grant application is entered, and performance monitored. Student data files will also be imported to the website and the resulting data will be tied to the grant indicators, activities and budget.

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Annual Perkins Priority Suggestions or Requests

Source: Performance measure this suggestion best relates to:

Program: Date: Perkins Appropriate?

Suggestion Title:

Suggestion Explanation & Details:

Add New Suggestion
Next or New Suggestion
Previous Suggestion

Step 1: Annual Perkins Priority Assessment

Each year, grantees will gather suggestions or funding requests from a variety of sources shown below. These suggestions will be tied to either an indicator or an approved Perkins Program, or as in most cases both.

<p>Source: <input type="text"/></p> <p>Program: <input type="text"/></p> <p>Suggestion Title: <input type="text"/></p> <p>Suggestion Explanation: <input type="text"/></p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;"><input type="text"/></td> </tr> <tr> <td>Advisory Council</td> <td>BT</td> <td>BCC</td> <td>15100</td> <td>CERT</td> <td>Building Trades</td> </tr> <tr> <td>Department Chairs</td> <td>CT</td> <td>BCC</td> <td>15100</td> <td>AAS</td> <td>Construction Technology</td> </tr> <tr> <td>Faculty</td> <td>HE</td> <td>BCC</td> <td>47030</td> <td>CERT</td> <td>Heavy Equipment Operations</td> </tr> <tr> <td>Other</td> <td>HT</td> <td>BCC</td> <td>52099</td> <td>CERT</td> <td>Hospitality Operations Management</td> </tr> <tr> <td>Performance Indicator Results</td> <td>NR</td> <td>BCC</td> <td>03020</td> <td>AAS</td> <td>Natural Resource Management</td> </tr> <tr> <td>Satisfaction Survey Results</td> <td>NS</td> <td>BCC</td> <td>11040</td> <td>AAS</td> <td>Network Technician Support</td> </tr> <tr> <td>Staff</td> <td>OA</td> <td>BCC</td> <td>52040</td> <td>AAS</td> <td>Office Administration</td> </tr> <tr> <td></td> <td>SB</td> <td>BCC</td> <td>52020</td> <td>AAS</td> <td>Small Business Management</td> </tr> </table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Advisory Council	BT	BCC	15100	CERT	Building Trades	Department Chairs	CT	BCC	15100	AAS	Construction Technology	Faculty	HE	BCC	47030	CERT	Heavy Equipment Operations	Other	HT	BCC	52099	CERT	Hospitality Operations Management	Performance Indicator Results	NR	BCC	03020	AAS	Natural Resource Management	Satisfaction Survey Results	NS	BCC	11040	AAS	Network Technician Support	Staff	OA	BCC	52040	AAS	Office Administration		SB	BCC	52020	AAS	Small Business Management
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																																																		
Advisory Council	BT	BCC	15100	CERT	Building Trades																																																		
Department Chairs	CT	BCC	15100	AAS	Construction Technology																																																		
Faculty	HE	BCC	47030	CERT	Heavy Equipment Operations																																																		
Other	HT	BCC	52099	CERT	Hospitality Operations Management																																																		
Performance Indicator Results	NR	BCC	03020	AAS	Natural Resource Management																																																		
Satisfaction Survey Results	NS	BCC	11040	AAS	Network Technician Support																																																		
Staff	OA	BCC	52040	AAS	Office Administration																																																		
	SB	BCC	52020	AAS	Small Business Management																																																		

Step 2: Prioritizing Suggestions and Recommendations

The suggestions and recommendations entered into the form shown above will be pulled together for the institution to review and prioritize with designated development groups. These groups will be trained on the required and permissible uses of funds and will review the data for each program offered by their institution before reviewing the suggestions. These groups will also work closely with the institution strategic planning groups to assure alignment of strategies.

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Grant Indicator & Activities Entry Form - (click on this title bar)

ID	Type	College	Year	Allocation	1P1	2P1	3P1	4P1	5P1	5P2
5	LAP	DCC	08	\$200,000.00	60.00%	78.42%	46.25%	87.56%	14.56%	15.20%
					(Assessment)	(Completion)	(Retention)	(Placement)	(Nontrad)	(NT Completion)

ID	College Name	Physical Address	Mailing Address
DCC	Dawson Community College	300 College Drive	
City	ST	Zip	Phone
Glendive	MT	59330	
		800 Number	Website
			www.dawson.edu
			Tax_id
			81-600240

Grant Contacts

Perkins Positions	First Name	Last Name	Institution Job Title	Email	Work Phone	E
<div style="border: 1px solid black; padding: 2px;"> ▼ </div>						
function	responsible_for			require		
Project Manager	Managing the grant activities, budget and overseeing the data.			Yes		
Institution President	Required for federal reporting purposes.			Yes		
Fiscal Manager	Producing the numbers for the quarterly fiscal and annual reports. May be resp			Yes		
Project & Data Manager	Perform both duties.			No		
Programmer	Institution contact for issues regarding the Perkins IV term file.			No		
Data Manager	Working with core indicator data and the Perkins IV database. If a Data Mana			No		
Board Chair	Requested for federal reporting purposes. Optional.			No		
Assistant Projector Manager	Assist with managing grant activities, budget and/or data.			No		

Step 3: Grant Contact and Demographic Information

Grantees will enter basic grant information required to manage the grant and provide effective communication with the local institution.

MONTANA MULTI-YEAR STATE PLAN 2008-12

Grant Indicator & Activities Entry Form - (click on this title bar)

ID	Type	College	Allocation	1P1	2P1	3P1	4P1	5P1	5P2
5	LAP	DCC	\$200,000.00	60.00%	78.42%	46.25%	87.56%	14.56%	15.20%
				(Assessment)	(Completion)	(Retention)	(Placement)	(Nontrad)	(NT Completion)

Indicator	Priority	Numerator Definition	Denominator Definition	Indicator Notes
-----------	----------	----------------------	------------------------	-----------------

Indicator Needs & Issues

Activities

Title	
Activity Details	

Special Populations	Disability: <input type="checkbox"/>	PELL/BIA: <input type="checkbox"/>	Single Parent: <input type="checkbox"/>	Displaced Homemaker: <input type="checkbox"/>	Limited English: <input type="checkbox"/>	Nontraditional: <input type="checkbox"/>
---------------------	--------------------------------------	------------------------------------	---	---	---	--

Required & Permissible Uses of Perkins Funds	<input type="text"/>				
--	----------------------	----------------------	----------------------	----------------------	----------------------

<input type="button" value="Next Activity"/>	<input type="button" value="Previous Activity"/>
<input type="button" value="Next Indicator & Activities"/>	<input type="button" value="Previous Indicator & Activities"/>

Step 4: Developing Strategies to Meet Performance Indicator and Special Population Goals

Grant Managers will start with their number 1 indicator priority and develop activities designed to meet indicator goals. The activities will be specific utilizing suggestions from the sources identified in the prioritization process. Program data will also be used to pinpoint specific strategies to create solutions to performance deficits at the source. These strategies have been proven to have more impact on the overall indicator than dealing with an indicator at the institution level.

Activities directed at specific or all population groups will be designated using the identifiers. These strategies can be extracted to share with others as best practices. All activities must assure they meet at least one of the approved required or permissible uses of Perkins funds.

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Grant Budget Entry Form - (click on this title bar)

Grant ID	Type	College	Allocation
1	LAP	MSUB	\$200,000.00

Step 1: Personnel
Step 2: Personnel

Personnel Cost Information for Grant ID#: 1

Position	Salary or Hourly	Annual Cost	Benefit %
Data Grants Specialist	H	\$28,000.00	34.67%
Advisor 2	S	\$45,000.00	34.00%
Data Grants Specialist	S	\$25,000.00	25.86%
funloving grants manager	S	\$22,000.00	29.00%
M Disability Services Coordinator		\$45,000.00	5.00%
M Fiscal Manager		\$0.00	0.00%
M Grant Data Manager		\$0.00	0.00%
M Nursing Coordinator		\$0.00	0.00%
Registrar		\$0.00	0.00%

[Click Here to Refresh the Position Field](#)

Step 5: Budgeting Perkins Funds

The first step in budgeting Perkins funds is to identify which positions will be partially funded using Perkins funds. These positions will be reviewed periodically to assure institutions are not supplanting funds.

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Grant Budget Entry Form - (click on this title bar)

Grant ID	Type	College	Allocation	Priority	Indicator	Indicator Goal	Next Indicator For This Grant	Previous Indicator For This Grant
2	LAP	BCC	\$200,000.00	1	5P2	14.23%		

Activity Review |
 Personnel |
 Operating Expenses |
 Equipment/No Indirects |
 Budget Summary

Indicator Issues: Participation in nontraditional programs has been decreasing as programs for low wage, high demand occupations keep increasing. The biggest issues will be to focus on the construction and healthcare programs to encourage students retention.

This is the test activity for placement

Req 5b - professional development - integration of academic & CTE
 Req 9 - High skill, wage or demand occupations for special populations

Second activity for retention

Req 5b - professional development - integration of academic & CTE
 Perm 1 - involve parents, businesses, & labor in the design, implementation, & evaluation of CTE programs

Lets see what the 3rd activity works like

Req 9 - High skill, wage or demand occupations for special populations
 Req 5a - professional development

Step 6: Final Budgeting Process

The first tab of the budgeting process is a review of the indicator issues and the activities developed to assure the indicator goals are met. Grantees will budget Perkins funds by priority and indicator, funding the highest priority indicator and activities first. Each expense category or line item may be budgeted over more than one indicator. The amount expended to each indicator will be reviewed for size, scope and quality to be effective to meet the goal. Budgeting by indicator will also help Montana to focus funds to the greatest areas of need or the greatest deficits.

The assurances and certifications required for the grantees are built into the system and will accept electronic signatures based on security codes and privileges assigned to each person based on their association with the grant.

Below are screen prints of the other tabbed budget sections, personnel, operating expenses and equipment from the budget form.

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Grant Budget Entry Form - (click on this title bar)

Grant ID	Type	College	Allocation	Priority	Indicator	Indicator Goal	Next Indicator For This Grant	Previous Indicator For This Grant
2	LAP	BCC	\$200,000.00	1	SP2	14.23%		

[Activity Review](#) |
 [Personnel](#) |
 [Operating Expenses](#) |
 [Equipment/No Indirects](#) |
 [Budget Summary](#)

Title or Personnel ID: % of Annual Cost Charged to this indicator:

Perkins Justification: explain the duties for this position specific to this indicator and the outlined activities

This position will perform all the nontrad placement services to a specifically targeted group of nontrad students. They will meet with each student 1/2 the way through the program.

Annual Cost for This Position: \$54,120.00
 Annual Cost for This Position & This Indicator: \$12,664.08
 [Refresh Totals](#)

[Next or New Personnel Expense](#) [Previous Personnel Expense](#)

[Activity Review](#) |
 [Personnel](#) |
 [Operating Expenses](#) |
 [Equipment/No Indirects](#) |
 [Budget Summary](#)

Operating Expense Category	Brief Description of This Operating Expense	Cost for this Indicator
<input type="text" value="Training or Registration Cost"/>	<input type="text" value="Test operating 1"/>	<input type="text" value="\$4,000.00"/>

- Audit Costs
- Consumable Supplies
- Contracted Services
- Dues, Subscriptions
- Minor Equipment (<\$5,000)
- Other
- Postage and Mailing
- Printing
- Rent
- Repair and Mainten
- Telephone
- Training or Registra**
- Travel
- Utilities

[Activity Review](#) |
 [Personnel](#) |
 [Operating Expenses](#) |
 [Equipment/No Indirects](#) |
 [Budget Summary](#)

Brief Description of This Expense	Cost for This Indicator
<input type="text" value="Server for Hospitality Program"/>	<input type="text" value="\$16,000.00"/>

Perkins Justification & Expense Details

The hospitality proram is new and existing servers are maxed. The 6 programs that make up this program are directed towards the nontrad indicator as 3 of the programs are nontraditional for females and 1 is nontrad for males.

[Next or New Equipment/No-Indirect Expense](#) [Previous Equipment/No-Indirect Expense](#)

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Appendix 9

9. Tech Prep Request for Proposal

MONTANA UNIVERSITY SYSTEM
OFFICE OF THE COMMISSIONER OF HIGHER EDUCATION
46 NORTH LAST CHANCE GULCH, POB 203201, HELENA, MT 59620-2101

REQUEST FOR PROPOSAL

THE CARL D. PERKINS CAREER AND TECHNICAL EDUCATION
ACT OF 2006 (Perkins IV)

TITLE II – TECH PREP

Fiscal Year 2008

Montana is launching an effort to move to a new organizational system for Career and Technical Education (CTE), using a tiered approach involving six career fields, 16 career clusters, and a number of career pathways – called *Big Sky Pathways*.

A transformed Tech Prep structure will be a key player in Montana’s updated CTE delivery system. To differentiate this new concept from its predecessor, it will be referenced in the remainder of this document as the *Consortium for Educational Advancement (CEA) – the New Tech Prep in Montana*. The newly awarded CEA grant will take a leadership role in developing and supporting Big Sky Pathways within each of the career clusters.

Members of the consortium will focus on developing model programs of study (known as Big Sky Pathways) that will be adopted by partners in the consortium and will also be available for use by other school districts and colleges within Montana.

Contents of CEA – the New Tech Prep in Montana:

The CEA will be organized around a system for Career Technical Education using Montana’s Career Fields and Clusters Model. The purpose of the CEA in this newly updated CTE delivery system is to take the leadership role in developing and supporting Big Sky Pathways in the selected Career Fields:

- Agriculture and Natural Resources,
- Arts and Communications,
- Business Management,
- Engineering and Industrial Technology,
- Health and Related Services,
- Social and Human Services.

To maximize the efficient use of limited resources from Tech Prep authority under Perkins IV, one statewide consortium grant will be awarded in Montana. Any two-year postsecondary institution in Montana may apply to be the lead entity for the CEA, covering **all** the Career Fields that have been specified above. If more than one postsecondary institution chooses to be part of a consortium that institution may apply jointly with the lead

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institution. Each participating postsecondary institution must have responsibility for developing at least one Big Sky Pathway, based on demonstrated competence and experience in the Career Field for which it is designated to take responsibility.

The grant awards will be based upon the potential of the applicant to address the elements of the consortium plan (listed below) in creating an effective consortium structure.

Eligible Applicants

According to Section 206 of the Perkins Act, the grant shall be awarded to consortia between or among:

- a local educational agency or an intermediate educational agency serving secondary school students; and
- a nonprofit institution of higher education that offers a 2-year associate degree program or a 2-year certificate program, and which is qualified as an institution of higher education pursuant to Section 102 of the Higher Education Act of 1965.
- in addition, a consortium may also include one or more institutions of higher education that award a baccalaureate degree.

Distribution of Funds

It is anticipated that approximately \$465,000 per year will be available to fund the Consortium for Educational Advancement – the New Tech Prep in Montana. **(This figure is dependant upon congressional authorization and is therefore subject to change).** The CEA grant will be competitively awarded. The grant will be awarded for a three year period, and may be extended based upon satisfactory performance during the first three years of the grant. During this period, the lead institution to which the grant has been awarded will be required to provide annual reports for review by state leadership to assure that the objectives of the grant are being met and funds spent appropriately. Renewal of the grant for the remaining three years of Perkins IV will be determined through a state review of overall programs.

THE APPLICATION

The Abstract

The grant application shall contain an *Abstract* that will describe how the consortium will carry out its goal, i.e., developing the Big Sky Pathways (programs of study). This description must indicate how the CEA will be statewide in scope. The *Abstract* must further indicate how the applicant intends to develop the secondary and postsecondary educational partnerships as well as the other partnerships necessary to develop a statewide consortium.

Points 10

The Objectives, Activities and Evaluations

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Developing the Big Sky Pathways based upon the Career Fields and Clusters Model is the goal of CEA – The New Tech prep in Montana. To carry out this goal the applicant **MUST** develop a 3-year plan that will contain the following elements:

1. A clear statement indicating the competence of each postsecondary institution to develop Big Sky Pathways within the designated Career Fields based on current and emerging workforce needs.
2. A clear statement indicating the objectives that will address the consortium's goal **in each year of the 3-year duration of the grant**. These objectives must be directly tied to the secondary and postsecondary core indicators of performance for Perkins IV legislation (Section 113(b) **and** the core indicators of performance and accountability for Tech Prep (Section 203(e)).
3. A list of activities designed to achieve each objective.
4. A statement of evaluation for each objective.

Points 40

Accountability and Performance

The consortium receiving a grant under Perkins IV must meet a minimum level of performance for each of the performance indicators described in sections 113(b) and 203(e) of the Act. The applicant must indicate how each of the performance measures will be met and what process of data collection will be used to validate these measures.

Please Note: A complete list of the Perkins core indicators of performance and accountability and the Tech Prep indicators of performance and accountability can be found in Section 113(b) and Section 203 (e) respectively in the *Carl D. Perkins Career and Technical Education Act of 2006*. This same list is found in Addendum I of this application.

Points 25

The Consortium Plan

The grant application must contain a plan that clearly indicates how the Consortium will be designed and implemented. The applicant **MUST**:

1. Name the lead postsecondary institution
2. Name any other educational institution/district, business, industry or other participants in the consortium if known at the time of the application, and attest specifically to the lead institutions' ability to directly cooperate with these participating agencies.
3. State clearly the Career Field(s) that each institution participating in the consortium will develop
4. Attest to the qualification and experience of the staff of the lead institution and other participating institutions.
5. Describe clearly the manner in which the appropriate data collection needs will be addressed. **(Before addressing this item please carefully read the Section # 5.5 of the Perkins Montana State Transitional Plan).**

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Further it will be necessary for the Consortium Plan in accordance with the Perkins Montana State Transitional Plan to meet the following requirements, based on Section 203 C of Perkins IV. The applicant must show how the plan will:

6. Develop credit transfer arrangements among participating postsecondary institutions in the consortium with one another and other institutions throughout the state,
7. Design transcription protocols for credits of secondary students upon successfully completing articulated courses.
8. Describe clearly and in detail how articulation agreements that are programmatic in scope will be developed in the consortium.
9. Develop a program of study that combines a minimum of 2 years of secondary education (as determined under State law); with a minimum of 2 years postsecondary education in a non-duplicative, sequential course of study; or an apprenticeship program of not less than 2 years following secondary education instruction.
10. Provide technical preparation in a career field, including high skill, high wage, or high demand occupations
11. Demonstrate how Big Sky Pathways will lead to employment.

Each applicant must also indicate how the CEA Program will also:

- Meet academic standards developed by the State: link secondary schools and 2-year postsecondary institutions, and if possible and practicable, 4-year institutions of higher education, through:
 - non-duplicative sequences of courses in career fields;
 - investigation of opportunities for tech prep secondary education students to enroll concurrently in secondary education and postsecondary education coursework;
 - use, if appropriate and available, work-based or worksite learning experiences in conjunction with business and all aspects of an industry;
 - use of articulation agreements.

In addition the applicant must specify how the CEA program will:

- Use educational technology and distance learning, as appropriate, to involve all participants in the consortium more fully in the development and operation of programs;
- Build student competence in technical skills and in core academic subjects (as defined in section 9101 of the Elementary and Secondary education Act of 1965), as appropriate, through applied, contextual, and integrated instruction, in a coherent sequence of courses;
- Lead to technical skill proficiency, an industry recognized credential, a certificate, or a degree in a specific career field;
- Provide a copy of signed assurances from the lead institution and any entities partnering or participating with the lead institution at the time of the application.
- Describe **in detail** the extent to which career clusters and pathways have been developed at the lead institution and other anticipated postsecondary institutions and secondary schools.
- Provide a clear design as to how business, industry, labor, institutions of higher education including four-year institutions, secondary schools and other pertinent parties will be included in the work of developing programs of study (BSP).
- Indicate how Perkins local program project directors whose institutions and schools are members of the consortium will be involved.
- Describe how the grant will address drop-out prevention;

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- Serve the explicit needs of special populations by providing equal access to the full range of technical preparation programs (including apprenticeship programs) and services appropriate to the needs of these special populations.
- Utilize national, state or regional employment trend data to identify significant workforce shortages.
- Help students achieve high academic and employability competencies such as those identified in industry standards and pertinent exit standards of student performance.

Points 35

Professional Development Requirements

In Perkins IV legislation including Title II (tech Prep) professional development must be high quality, sustained, intensive and classroom focused in order to have a positive and lasting impact on instruction and the teachers performance in the classroom, and not one-day, short-term workshops or conferences. With that in mind the applicant must submit a clear plan on how the grant will address professional development for secondary and postsecondary teachers and counselors.

The applicant must:

1. Include in-service professional development for teachers, faculty, and administrators that—
 - support effective implementation of tech prep programs, supports joint training in the tech prep consortia, supports the needs, expectations and methods of business and all aspects of an industry, supports the use of contextual and applied curricula, instruction, and assessment;
 - support the use and application of technology;
 - and assist in accessing and utilizing data, information available pursuant to occupational and employment information, and information on student achievement, including assessments.
2. Include professional development programs for counselors designed to enable counselors to more effectively:
 - provide information to students regarding tech prep programs;
 - support student progress in completing tech prep programs, which may include the use of graduation and career plans;
 - provide information on related employment opportunities; ensure that students are placed in appropriate employment or further postsecondary education;
 - stay current with the needs, expectations, and methods of business and all aspects of an industry; and
 - provide comprehensive career guidance and academic counseling to participating students including special populations.

Points 10

Fiscal Management of the Grant

The fiscal management of the grant must include a properly formatted budget page (see www.mus.edu/wochewd) and a budget narrative that clearly and explicitly explains each item of the budget line item by line item. **Because this is a three-year grant, it will be necessary to submit a budget page and budget narrative for each of the**

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three funded years of the grant. This budget information must **directly** tie in to the yearly goal and objectives of the grant and these connections must be explicitly noted in the application.

The grant application must contain an explicit statement indicating that the use of the federal funds in this grant will supplement and not supplant other funding sources.

Points 30

ADDENDUM I

Core Indicators

Section 113 (b) Title I

Secondary Level

- (i) Student attainment of challenging academic content standards and student academic achievement standards,
- (ii) Student attainment of career and technical skill proficiencies, including student achievement on technical assessments that are aligned with industry recognized standards, if available and appropriate,
- (iii) Student rates of attainment of each of the following:
 - (I) A secondary school diploma
 - (II) A General Education Development credential, or other state-recognized equivalent,
 - (III) A proficiency credential, certificate, or degree, in conjunction with a secondary school diploma if offered.
- (iv) Student graduation rates
- (v) Student placement in postsecondary education
- (vi) Student participation in and completion of career and technical education programs that lead to non-traditional fields.

Postsecondary Level

- (i) Student attainment of challenging career and technical skill proficiencies including student achievement on technical assessments that are aligned with industry-recognized standards, if available and appropriate.
- (ii) Student attainment of an industry-recognized credential, a certificate or a degree.
- (iii) Student retention in postsecondary education or transfer to a baccalaureate degree program.
- (iv) Student placement in military service or apprenticeship programs or placement or retention in employment, including placement in high skill, high wage, or high demand occupation or professions.
- (v) Student participation in, and completion of, career and technical education programs that lead to employment in on-traditional fields.

Section 203 (e) Title II

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- A) The number of secondary education CEA students and postsecondary education CEA students served.
- B) The number and percent of secondary education CEA students enrolled in the CEA program who
- (i) enroll in postsecondary education,
 - (ii) enroll in postsecondary education in the same field or major as the secondary education CEA students were enrolled at the secondary level,
 - (iii) complete a State or industry-recognized certification or licensure,
 - (iv) successfully complete a secondary school student, courses that award postsecondary credit at the secondary level, and enroll in remedial mathematics, writing, or reading courses upon entering postsecondary education
- C) The number and percent of postsecondary education CEA students who
- (i) are placed in a related field of employment not later than 12 months after graduation from the CEA program
 - (ii) complete a State or industry-recognized certificate or licensure
 - (iii) complete a State or industry-recognized certificate program within the normal time (3 years) for completion of such a program, and
 - (iv) complete a baccalaureate degree program within the normal time (6 years) for completion of such a program.

ADDENDUM II

DEFINITIONS

Articulation Agreements

Written commitment that is agreed upon at the State level or approved annually by the lead administrators of:

- A secondary institution and a postsecondary education institution; or
- A sub-baccalaureate degree granting postsecondary educational institution and a baccalaureate degree granting postsecondary education institution; and to a program that is:
- Designed to provide students with a non-duplicative sequence of progressive achievement leading to technical skill proficiency, a credential, a certificate, or a degree; and

Linked through credit transfer agreements between the two institutions described above

Big Sky Pathways

Montana's term for CTE programs of study.

Career Cluster

a grouping of occupations and broad industries based upon commonalities. Clusters provide an organizing tool for schools, small learning communities, academic, and magnet schools.

Career Field

a Montana grouping of usually two or more Career Clusters

Career Pathway

represents a grouping of occupations within a cluster based on commonalities

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CEA Student (Postsecondary)

One who has completed the secondary component of a CEA program and has enrolled in the postsecondary component of a CEA program.

CEA Student (Secondary)

One who has enrolled in 2 courses in the secondary education component of a CEA Program.

Plan of Study

A personalized guide to help the student choose the appropriate academic and CTE classes that are required for high school graduation and appropriate academic and CTE classes that are required for high school graduation and further advancement in their chosen BSP pathway.

Program of Study

combines a minimum of two years of secondary education with:

- a minimum of two-years of postsecondary education in a non-duplicative sequential course of study; or
- an apprenticeship program of not less than two years following secondary education.

PREPARATION AND FORMATTING REQUIREMENTS

The Consortium for Educational Advancement the New Tech Prep Grant Application will be transmitted to presidents and deans of Montana's 2-Year postsecondary institutions electronically but the application is to be returned in hard copy as indicated below **using the transmitted format only**.

The grant application is to be prepared and formatted according to the following specifications.

1. **Two copies** of the application are to be submitted to the Office of the Commissioner of Higher Education, POB 203201; Helena, MT 59620-3201 attention George Burns, Grants Manager.
2. The application is to be postmarked **no later than midnight on Friday, July 20, 2007**. The application is to be sent via US Postal Service **Registered Mail**.
3. **Applications will not be accepted via FAX or electronic mail and funding for applications will not be guaranteed if they are not received by the above time and date.**
4. Applications are to be submitted on white, 8 ½ by 11 inch paper using a 12-pt font.

MONTANA MULTI-YEAR STATE PLAN 2008-12

5. The pages of each copy of the application are to be attached using a simple clip. Do not place the completed application in a binder or folder.

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Appendix 10

10. Reserve Request for Proposal

**MONTANA UNIVERSITY SYSTEM
OFFICE OF THE COMMISSIONER OF HIGHER EDUCATION
46 NORTH LAST CHANCE GULCH, P.O. 203201, HELENA, MT 59620-2101**

**REQUEST FOR PROPOSAL
2007-2009, Perkins Act Reserve Fund Distribution
To Strengthen Services to Special Populations
Served Through Career and Technical Education Programs**

Timeline

August 16, 2007:	Funding Distribution Announcement finalized and sent to Perkins Eligible Recipients (postsecondary institutions and school districts)
October 1, 2007 5 p.m.	Deadline for accepting proposals for Reserve funds to strengthen services to special populations
October 15, 2007	OCHE announces recipients of Reserve Fund allocation.
July 15 2008	First-year progress report due to OCHE to qualify for continued funding.
July 20, 2008	Second year funding allocated
June 30, 2009	End of funding cycle.
August 20, 2009	Final Report due

Purpose

The Carl D. Perkins Career and Technical Education Act of 2006 places a strong emphasis on providing activities to prepare special populations who are enrolled in career and technical education programs, for high skills, high wage, or high demand occupations that will lead to self-sufficiency [Section 135, required uses (9)].

The purpose of this funding, administered through the authorized “reserve funding” under the Act, is to allow eligible recipients of funds – postsecondary institutions and school districts – to contract with community-based organizations for strengthening and improving CTE services to students from special populations that are enrolled in approved CTE programs. Community-based organizations are defined as Montana non-profit organizations.

Background

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Through a Memorandum of Understanding, in relation to the administration of the Carl D. Perkins Career and Technical Education Act of 2006, the Office of the Commissioner and Office of Public Instruction agreed to set aside a minimum of \$360,000 of Reserve funds for the biennium ending June 30, 2009. These funds are to be used to support partnerships between eligible recipients and community-based organizations, consistent with the Montana Carl D. Perkins Transition State Plan, as approved by the Montana Board of Regents, the eligible agency, and the United States Department of Education.

In fulfilling this Memorandum of Understanding, OCHE will designate funds that are identified for use under the "Reserve Fund" authority. These Reserve funds represent 10% of the 85% of the funds designated for local use i.e. secondary districts and postsecondary institutions.

In Montana's Carl D. Perkins Transition State Plan, a number of possible strategies to address the needs of special populations are identified. These strategies may be assessed to determine their relative impact on student outcomes.

The Perkins Act of 2006 identifies the following students as "special populations:"

- individuals with disabilities;
- individuals from economically disadvantaged families, including foster children;
- individuals preparing for non-traditional fields,
- single parents, including single pregnant women; and
- Individuals with limited English proficiency.

These strategies identified for consideration in the Transition Plan include:

- How Big Sky Pathway plans of study can be customized to identify supportive services and additional opportunities that special populations students will benefit from;
- How Big Sky Pathways (BSPs) can be adapted and offered to adult learners, particularly those who are part of special populations;
- How information about BSPs and other CTE programs can be targeted in career counseling for special populations students;
- How academic assessments, career interest inventories, and information about local and regional employment outlook information can be integrated into career and admissions counseling for special populations students;
- How regular support group meetings for special populations students can assist with retention;
- How outreach resources can be targeted to special populations in advertisements catalogues and course listings;
- How community-based organizations and other groups that work with two-year postsecondary institutions and school districts can develop collaborative services to help special populations experience a higher degree of success in the Perkins Performance Indicators and other metrics;
- How professional development can be offered to teachers and faculty to help them effectively work with and teach special populations students;
- How voluntary self-disclosure processes at the postsecondary level can be made more consistent and effective in identifying special populations students to receive services;

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- How all school and college counselors can provide more effective counseling and guidance for special populations students;
- How financial aid and scholarship information can be made available to special populations students, including those who are economically disadvantaged, so they can understand opportunities for financing postsecondary education;
- How financial literacy/money management training can be provided for students, especially those receiving financial aid and who are economically disadvantaged or face other barriers;
- How information about additional scholarship funds can be made more readily available and/or targeted to special populations students;
- How information from national organizations (i.e. The National Alliance for Partnerships in Equity, Inc. (NAPE) and Women Work! The National Network for Women's Employment) can inform practices and policies in Montana;
- How outreach and recruiting activities for students in special populations can be better coordinated between secondary schools and two-year postsecondary institutions, particularly with respect to federal student record privacy concerns;
- How career planning orientation, assessment, life skills and job readiness workshops, small group meetings, counseling and tutoring services for special populations can be integrated into CTE programs that provide challenging academic content and relevant career and technical education content; and
- How materials about Big Sky Pathways, and other relevant resources and counseling, can be provided to students with limited English Proficiency, addressing language barriers.

Of the strategies that are implemented, they will be reviewed over time for their effectiveness. School districts and postsecondary institutions using Reserve Funds for these purposes will not be expected to fully implement every strategy listed.

Distributions of Funds

The state will award \$360,000 of the FY 2008 Reserve fund to provide services to special populations enrolled in secondary or postsecondary career and technical education programs. Successful applicants will be allocated a minimum of \$30,000 to a maximum of \$60,000 for the biennium with no more than \$15,000 to \$30,000 awarded each year of the biennium.

The first year of funding will be awarded in October 2007 (see *timeline*). Dependent upon federal allocation, the second year of funding will be approved if the recipient has met adequate progress in implementing its objectives during year one. The second year of funding will be available after July 20, 2008 (see *timeline*). Only an "eligible recipient" as defined in the Perkins Act (two-year postsecondary institutions and school districts) may apply for Perkins Reserve funds to serve special populations through this competitive process.

Application

Abstract

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The application shall contain an *Abstract that will* describe how the goal of the program to be implemented will be carried out i.e. strengthening the services to special populations. The *Abstract* must further indicate how the applicant will utilize the contracted services of a community-based organization (as defined) to meet the goal of the identified program.

Objectives, Activities and Evaluations

To carry out the goal (s) of the proposal, the applicant MUST develop a two-year plan that will contain the following elements:

1. Name of the specific community-based organization (defined as a Montana non-profit organization) that has agreed to enter into a contract with the eligible recipient to provide services to improve the performance of special populations enrolled in secondary or postsecondary CTE programs;
2. A clear statement indicating the objectives that will address the goal (s) **in each year of the two-year duration of the grant** that demonstrates How the services offered by the community-based organization will directly and primarily benefit individuals who are members of special populations who are currently enrolled in a CTE program of study offered by the eligible college or school district. These objectives must be directly tied to the secondary and postsecondary core indicators of performance for Perkins IV legislation (Section 113(b));
3. How the services offered by the community-based organization address required and permissive uses as detailed in Section 135 of the Perkins legislation as well as relate to and support priorities identified by Montana in its Carl D. Perkins Transition Plan;
4. A list of activities designed to achieve each objective; and,
5. A statement of evaluation for each objective.

Plan of Operation

This is the section where the many components of the program designed to strengthen services to special populations enrolled in career and technical education programs will be described. This is the opportunity to demonstrate the overall consistency of the plan in relation to its conceptual framework, objectives, activities and evaluation.

Accountability

Indicate how the community-based organization in coordination with the eligible postsecondary institution or school district (specifically, the contact person responsible for managing Perkins funds at the secondary and postsecondary level) will collect data on program quality and program impact, and will include data on the accountability indicators required by the Perkins Act

Eligibility and Submission

Any Perkins eligible postsecondary institution or secondary school may present a proposal for Perkins Reserve Funds. Proposals must contain the following forms, all available on the website of the Workforce Development Unit of the Office of the Commissioner of Higher Education

(www.mt.edu/wochewd):

- Data Contact
- Certificate and Assurances
- Debarment

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- Lobbying
- Detailed Budget

Proposals must be submitted by 5:00 PM, October 1, 2007 to the Office of the Commissioner of Higher Education, P. O. B. 203201, Helena, MT 59620-3201, Attn: George Burns. The proposals will be reviewed to determine if they meet the requirements of this announcement. Proposals meeting the requirements will be forwarded to a review panel for scoring and ranking based upon the scoring criteria included in this announcement.

Applicants for these funds may view Montana's proposed Perkins Transition plan on the following website: <http://mus.edu/wd/default.asp>

Note: Any funds not allocated through this process will revert to the 10% Reserve category.

Budget Request

An eligible recipient must request between a minimum of \$15,000 and a maximum of \$30,000 for each year of the two-year biennium. A budget for FY 2008 and FY 2009 must be submitted with the proposal.

Matching Funds

- No matching funds are required to receive this funding distribution.
- The application must **explicitly** state that the federal funds used in this project will supplement, not supplant other funding sources.

Reporting (see *timeline*)

The recipients of funds will be announced on or before October 15, 2007. On July 15, 2008, the first year report will be due to OCHE. This report will be reviewed to determine progress in meeting the program's objectives for year one. Second year funding will be available July 20, 2008 for programs that demonstrate progress. The end of the funding cycle will be June 30, 2009. A final report to the OCHE will be due August 20, 2009.

SCORING CRITERIA

Total Points: 100

Abstract (10 Points)

- What is the Community-Based Organization that will provide services?
- What services will be provided?
- What is the overall goal of the project?
- What evaluation method will be utilized to measure progress toward meeting the objectives of the project?

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Objectives, Activities and Evaluation (40 points)

- Are the goals and objectives clearly stated for the two-year duration of the project?
- How well does the applicant tie the objectives to the Core Indicators of Performance? [Title I, Section 113].
- How clearly does the applicant list the activities designed to carry out the program objectives for each of the two years?
- Are the evaluations clearly listed for each of the program years and do they directly evaluate the appropriate objective?

Accountability and Performance (25 points)

- Are the data collected related to program quality and program impact as well as the data on the accountability indicators required by the Perkins Act specifically mentioned in the application?
- How will substantiating data be collected?

Plan of Operation (20 points)

- Does the overall plan address the specific needs of special populations enrolled in career and technical education at either a secondary school or postsecondary institution?
- Are the strategies to be implemented tied to the Required and Permissive Uses of funds in Section 135 of the Carl D. Perkins legislation of 2006?
- Is there consistency within the plan when this section is read in its entirety?

Fiscal Management (5 points)

- Does the fiscal management reflect budgets and budget narratives for two separate years?
- Do the budgets calculate correctly?
- Is a copy of the contract with the Community-Based Organization included?
- Do the figures in the budget line items correspond accurately to the appropriate line items on the budget pages?

Addenda

Points should not be awarded for addendas to the application or for their content. However, it is important for the reader to check the addenda for pertinence, substantiation of the application content and other clarity.

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Appendix 11

11. Nontraditional Fields Request for Proposal

Program Title: Non-Traditional Fields, Carl D. Perkins Career and Technical Education Act of 2006, Title I, Part A, Section 112 (a)(2)(B)

The Office of the Commissioner of Higher Education is requesting applications for development and implementation of a statewide Institute for secondary students, to introduce them to non-traditional field opportunities in Montana.

NOTE: Please read this application carefully, as the Perkins Law has changed and new requirements are in place for Perkins Funds. Direct all inquiries to Alyssa Townsend-Hudders at (406) 444-0318, ath@montana.edu. Technical assistance is available and applicants are encouraged to use these services.

To apply for a grant for the Non-Traditional Fields funds, please submit 2 hard copies of the following:

1. Format for Proposals Form
2. Project proposal narrative (four pages maximum)
3. Detailed Budget Form with a Budget Narrative

Preparation and Formatting Requirements

The Perkins Nontraditional Fields Request for Proposal is to be prepared and formatted according to the following specifications:

- **The proposal is to be postmarked** no later than midnight September 15, 2007. **The application is to be sent via registered mail or hand delivered.**
- Proposals will not be accepted if they are received after the above date, nor will they be accepted if incomplete or without the correct signatures.
- Proposals are to be submitted on white 8 1/2 by 11-inch paper using a 10 or 12-pt font.
- The pages of each copy of the proposal are to be attached using a simple clip. Do not place the completed proposal in a binder or folder.
- The cover page of the proposal is the Format for Proposals form provided in this application packet.

Submit the two hard copies of the Application Package to:

Alyssa Townsend-Hudders, Workforce Development Unit
Office of the Commissioner of Higher Education
PO Box 203201
Helena, MT 59620-3201

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**FORMAT FOR PROPOSALS
REQUEST FOR PROPOSALS FOR FUNDS FROM THE
CARL D. PERKINS CAREER AND TECHNICAL EDUCATION ACT OF 2006**

A. NON-TRADITIONAL FIELDS FUNDS

IMPORTANT: Please type or print in ink. You may submit this report through regular mail only. PLEASE NOTE THAT LATE, INCOMPLETE OR UNSIGNED REPORTS COULD RESULT IN FORFEITURE OF GRANT MONEY FROM NON-FEDERAL FUNDS.

Eligible Recipient-Secondary or Postsecondary Institution	Date of Application	Applicant or Project ID Number
---	---------------------	--------------------------------

Title of Proposed Project in 14 words or less (if applicable):

Project Director

Director's Address	City	State	Zip
---------------------------	-------------	--------------	------------

Telephone Number (s)	Email Address
-----------------------------	----------------------

Fax Number (s)

Fiscal Staff	Phone Number	Email
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CERTIFICATION

I certify to the best of my knowledge and belief that this report, is correct and complete and that all outlays and unliquidated obligations are for the purposes set forth in the award documents.

Project Director's Signature:

Date Signed:

CERTIFICATION AND ASSURANCES

CARL D. PERKINS CAREER AND TECHNICAL EDUCATION ACT OF 2006

The applicant will comply with the requirements of P.L.105-332 (the Perkins Act) and all applicable federal and state rules and regulations, including timely reporting of fiscal and programmatic data. **In particular, P.L. 105-332 funds will be used to supplement, and in no case to supplant, state or local funds.**

The applicant assures the Montana Board of Regents that services provided under the approved project will be provided in accordance with P.L.105-332, will not discriminate or violate provisions of Title IX of the Education Amendments of 1972, Title VI of the Civil Rights Act of 1964, or Section 504 of the Rehabilitation Act of 1973.

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B. REQUEST FOR PROPOSALS Program Year 07-08

NON-TRADITIONAL FIELDS Carl D. Perkins Career and Technical Education Act of 2006 Title I, Part A, Section 112(a)(2)(B) State Leadership Funds

A. The Purpose

In part, the Carl D. Perkins Career and Technical Education Act of 2006, Section 112(a) states:

- (a) In General. – From the amount allotted to each State under Section 111 for a fiscal year, the State board (hereinafter referred to as the “eligible agency”) shall make available –
 - (2) Not more than 10 percent to carry out State leadership activities described in section 124, of which –
 - (B) Not less than \$60,000 and not more than \$150,000 shall be available for services that prepare individuals for nontraditional fields.

The Montana Perkins Transitional Plan allocates \$60,000 for Nontraditional Fields to be competitively let by the Office of the Commissioner of Higher Education.

Nontraditional fields means occupations or fields of work, including careers in engineering technology, mechanics and other emerging high skill occupations, for which individuals from one gender comprise less than 25 percent of the individuals employed in each such occupation or field of work. Students with little or no previous experience in Career and Technical Education programs must be the target audience for the Institute. From the table attached, OCHE is looking for proposals that will affect the greatest number of students in the areas of greatest discrepancy. The successful applicant must choose from the attached table the areas to be targeted for the Institute.

B. Distribution of Funds

Up to \$60,000 is allocated for one awarded proposal over a two year time span (ending June 30, 2009) through a week-long, statewide Institute and follow up activities that familiarizes secondary students with the opportunities available for a non-traditional career. The grant awardee will also be responsible for allocating a minimum of 25% of the awarded monies to students, to encourage secondary students to attend the Institute via scholarships, travel expenses paid, etc. Proposals selected will not necessarily receive the grant amount requested if a lesser amount is determined to be appropriate.

C. Applicant Eligibility

Eligible applicants are secondary schools and postsecondary institutions. The awardee will work closely with OCHE and OPI staff to meet the statewide goal of the Institute.

D. Components of the Proposal

Each proposal must contain the following information, which will be weighted as shown:

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Points

Component

30 I. Rationale for the Project (two page limit)

Describe:

- The entity responsible for administering the project.
- A brief summary of the project director's qualifications, including education and/or work experience for directing the activities of the proposed project.
- The partnerships developed for this proposal. They may include but are not limited to partnerships among secondary schools (particularly with Career Counselors), postsecondary institutions, community-based organizations, business and industry representatives. Any letters of support in the application must directly relate to the application narrative. If no other relevant service agencies exist in the applicant's service area, this must be stated as a substitute for evidence of coordination.
- The need this program is addressing needs that other programs do not address.
- The methods used to determine the relevance of this project in providing nontraditional training and employment.

II. 60 II. Nontraditional Fields Project Plan (two page limit)

Objectives and Activities:

- Describe how an institute for students will be carried out to show novice students the opportunities of nontraditional training and employment. **State what will be done, by whom within a timeline.**
- The applicant must choose the career areas to be targeted for the institute from the attached table.
- Describe how this proposal provides statewide dissemination.
- Describe how counselors will be informed and encouraged to make this opportunity available to students, and what outreach efforts will be made for participants, particularly in rural areas.
- Describe any follow-up activities with the student subsequent to the Institute.

Evaluation plan. Describe the method of evaluation for **each** activity associated with the Institute. This includes describing the tools of assessment that will be used to evaluate the activities.

10 III. Budget Narrative and Budget Form

- Describe how the federal funds requested will be expended to conduct the planning and implementation of the proposal, using the provided detailed budget form and accompanying budget narrative form.
- When indirect costs are requested, the percentage must be negotiated IDC rate or 8%, whichever is the lesser amount.
- Although no match is required, describe what other funds, if any, will be used to achieve project objectives. **Specific statement must be made on non-supplanting of local or state funds.**

100 TOTAL MAXIMUM POINTS*

*Proposals that do not achieve at least 50 points will be disqualified. A proposal will be considered a "Qualified Plan" for rating ONLY if the Format for Proposal/Certificate & Assurances form is properly signed and included.

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Instructions for filling out a Budget Narrative

The Budget narrative is to follow the categories on the budget spreadsheet. This is a SAMPLE BUDGET NARRATIVE for you to refer to as you develop your own.

- For salaries, include a list of who is being paid, at what FTE and the total amount.
- Hourly wages – same as salaries
- Employee benefits – include a list of who is receiving benefits, what type of benefits, and how much is paid per benefit
- Consumable supplies – include a list of the types of supplies and the costs estimated with each. Please note that this category refers to items such as office supplies and while food may be considered consumable, it does not fit in this category.
- Minor equipment – the total cost for minor equipment must be under \$5,000.
- Travel – include a list of who is traveling, the mileage, lodging, meals, airfare, etc. Use the state approved reimbursement schedule. Mileage for use of a personal car is paid at 44.5 cents per mile if no state car is available and other conditions are met. Otherwise reimbursement is 23.5 cents per mile. In-state per diem is \$23 a day (\$5 breakfast, \$6 lunch, and \$12 dinner). Out of state per diem is \$36 per day (\$7 breakfast, \$11 lunch, and \$18 dinner). Lodging is \$60 in Montana. Out of state travel follows federal rates. If there is no receipt for lodging, the reimbursement rate is \$12 per night.
- Indirect costs – negotiated IDC rate or 8% whichever the lesser
- Major equipment – the total cost for major equipment must be over \$5,000.

If some line items are not applicable to your specific grant, then just enter \$0 or leave them off entirely. Additional questions contact Alyssa Townsend-Hudders at 406-444-0318.

Sample Budget Narrative-alter as needed

School Name
Program Name and Year

Personal Services

1. Salaries

Program Coordinator
.50 (Grade __) FTE \$ _____

Substitute Teachers
(needed when teachers are sent to meetings, trainings, conferences, etc.)
Approximately __ days at \$80 per school day \$ _____

Total Salaries \$ _____

2. Hourly Wages

Fiscal Manager (hourly rate multiplied by total hours)..... \$ _____

3. Employee Benefits

Program Coordinator
Health insurance \$ _____
PERS (rate __) \$ _____
FCIA (rate __) \$ _____
UCC (rate __) \$ _____

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IAB (rate ___) \$ _____

Fiscal Manager

 Social Security (rate___) \$ _____

 Retirement (rate ___) \$ _____

 Worker's Comp (rate ___) \$ _____

 Unemployment (rate ___) \$ _____

Total Employee Benefits \$ _____

4. Total Personal Services \$ _____

Operating Expenses

5. Contracted Services \$ _____

 Website development and maintenance

6. Audit Costs \$ _____

 Brief description

7. Consumable supplies

 Office supplies \$ _____

 Software/computer supplies \$ _____

 Total Consumable supplies \$ _____

8. Minor Equipment (<\$,5000)

 Laptop computer \$ _____

 Software update \$ _____

 Total Minor Equipment \$ _____

9. Printing

 In house Xerox costs \$ _____

 Newsletters and flyers \$ _____

 Promotional materials \$ _____

 Total Printing \$ _____

10. Postage and mailing \$ _____

11. Telephone

 Monthly charge \$ _____

 Long distance \$ _____

 Cell phone \$ _____

 Total Telephone \$ _____

12. Travel

 State conference

 Mileage (___ at an average of ___ miles x \$0.235 per mile) \$ _____

 Lodging (___ rooms at \$60 per room) \$ _____

 (Airfare ____, Lodging ____, Meals ____) \$ _____

13. Rent \$ _____

 e.g. conference room

14. Utilities..... \$ _____

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- 15. Repair and maintenance \$ _____
- 16. Other \$ _____
- 17. Total Operating Expenses \$ _____
- 18. Indirect Costs (= <8%) \$ _____
 Indirect = negotiated IDC rate or 8% whichever the lesser

- 19. Major Equipment (=>\$5,000) \$ _____

Brief description

20. **Total Budget** \$ _____

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Appendix 12

12. Institutions Request for Proposal

Program Title: Institutions Grant, Carl D. Perkins Career and Technical Education Act of 2006
Title I, Part B, Section 124

The Office of the Commissioner of Higher Education is requesting applications for development and implementation of educational program(s) to serve individuals at state correctional institutions and institutions that serve individuals with disabilities.

NOTE: Please read this application carefully, as the Perkins Law has changed and new requirements are in place for Perkins Funds. Direct all inquiries to Alyssa Townsend-Hudders at (406) 444-0318, ath@montana.edu. Technical assistance is available and applicants are encouraged to use these services.

To apply for a grant for Institutions funds, please submit 2 hardcopies of the following:

4. Format for Proposals Form
5. Project Proposal Narrative (four pages maximum)
6. Objectives, Activities and Evaluation Form
7. Detailed Budget Form with a Budget Narrative

Preparation and Formatting Requirements

The Perkins Institutions Request for Proposal is to be prepared and formatted according to the following specifications:

- **The proposal is to be postmarked no later than midnight August 31, 2007. The application is to be sent via registered mail or hand delivered.**
- Proposals will not be accepted if they are received after the above date, nor will they be accepted if incomplete or without the correct signatures.
- Proposals are to be submitted on white 8 1/2 by 11-inch paper using a 10 or 12-pt font.
- The pages of each copy of the proposal are to be attached using a simple clip. Do not place the completed proposal in a binder or folder.
- The cover page of the proposal is the Format for Proposals form provided in this application packet.

Submit the two hard copies of the Application Package to:

Alyssa Townsend-Hudders, Workforce Development Unit
Office of the Commissioner of Higher Education
PO Box 203201
Helena, MT 59620-3201

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**FORMAT FOR PROPOSALS
REQUEST FOR PROPOSALS FOR FUNDS FROM THE
CARL D. PERKINS CAREER AND TECHNICAL EDUCATION ACT OF 2006**

C. INSTITUTION FUNDS

IMPORTANT: Please type or print in ink. You may submit this report through regular mail only. PLEASE NOTE THAT LATE, INCOMPLETE OR UNSIGNED REPORTS COULD RESULT IN FORFEITURE OF GRANT MONEY FROM NON-FEDERAL FUNDS.

Eligible Recipient	Date of Application	Applicant or Project ID Number
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Title of Proposed Project in 14 words or less (if applicable):

Project Director

Director's Address	City	State	Zip
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Telephone Number (s)	Email Address
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Fax Number (s)

Fiscal Staff	Phone Number	Email
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CERTIFICATION

I certify to the best of my knowledge and belief that this report, is correct and complete and that all outlays and unliquidated obligations are for the purposes set forth in the award documents.

Project Director's Signature:

Date Signed:

CERTIFICATION AND ASSURANCES

CARL D. PERKINS CAREER AND TECHNICAL EDUCATION ACT OF 2006

The applicant will comply with the requirements of P.L.105-332 (the Perkins Act) and all applicable federal and state rules and regulations, including timely reporting of fiscal and programmatic data. **In particular, P.L. 105-332 funds will be used to supplement, and in no case to supplant, state or local funds.**

The applicant assures the Montana Board of Regents that services provided under the approved project will be provided in accordance with P.L.105-332, will not discriminate or violate provisions of Title IX of the Education Amendments of 1972, Title VI of the Civil Rights Act of 1964, or Section 504 of the Rehabilitation Act of 1973.

MONTANA MULTI-YEAR STATE PLAN 2008-12

D. REQUEST FOR PROPOSALS

Program Year 07-08

INSTITUTIONS

Carl D. Perkins Career and Technical Education Act of 2006

Title I, Part B, Section 124

State Leadership Funds

A. The Purpose

As part of the responsibility in administering the Perkins Act of 2006 the Office of the Commissioner of Higher Education shall conduct State Leadership activities. A required use of State Leadership funds is **to serve individuals in State institutions**, such as state correctional institutions and institutions that serve individuals with disabilities.

Career and Technical Education programs include organized educational programs whose purpose is to prepare individuals in employment in current or emerging occupations requiring other than a baccalaureate or advanced degree. To serve individuals in state institutions, these programs may include competency-based applied learning, higher-order reasoning and problem solving skills, work attitudes, general employability skills, and occupational-specific skills. It is the aim of these programs to prepare individuals for economic independence while they are still in State institutions. This economic independence will help enable them to be productive and contributing members of society.

B. Distribution of Funds

In part, the Carl D. Perkins Career and Technical Education Act of 2006, Section 112(a) states:

- (a) In General. – From the amount allotted to each State under Section 111 for a fiscal year, the State board (hereinafter referred to as the “eligible agency”) shall make available –
 - (2) Not more than 10 percent to carry out State leadership activities described in section 124, of which –
 - (A) An amount equal to not more than 1 percent of the amount allotted to the state under Section 111 for the fiscal year shall be made available to serve individuals in State institutions, such as State correctional institutions and institutions that serve individuals with disabilities.

In the Montana Transitional Plan (07-08) the amount allotted to serve individuals in State institutions shall not exceed one-half of 1 percent of the amount allotted to the state, or **approximately \$28,000 to be awarded in a single grant.**

C. Components of the Proposal

Each Proposal for the use of Title I, Section 124(b)(7) funds must contain the following information, which will be weighted as shown:

Points

20

Component

Rationale for Project (two page limit)

Describe:

- The institution(s) responsible for administering the program.

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- A brief summary of the project director's qualifications by education and/or work experience for directing the activities of the proposed project(s). Briefly describe the education/experience background of the staff persons responsible for actually conducting the program.
- The effectiveness of career and technical programs at that institution in providing employment skills for program participants in which job openings are projected or available based on labor market analysis.
- What need the proposed program is addressing that other institutions' programs do not address.
- What ways the program will involve cooperation and coordination with other State/Local agencies and regional business/industry. Any letters of support in the application must directly relate to the application narrative. If no other relevant business/industries exist in the applicant service area, this must be stated as a substitute for evidence of coordination.
- How the proposed program can be adjusted/made available for replication throughout the relevant state institutional system in Montana.

30 Objectives of the Program(s)

In the proposal narrative describe the objectives that will be achieved as a result of the programs included in the proposal. Then, using the Objectives/Activities/Evaluation form provided, please list these objectives briefly in the order shown on the narrative.

The objectives must:

- Include the approximate number of individuals to be served during the program year and the estimated percentage of student completion;
- Be stated in measurable terms.

20 Activities to Achieve Objectives

In the proposal narrative describe the activities that will be carried out to achieve *each* stated objective. Then, using the Objectives/Activities/Evaluation form provided, **State what will be done, by whom and within what time frame.**

20 Evaluation

In the proposal narrative, specify the criteria by which each stated objective will be achieved. Then, using the Objectives/Activities/Evaluation form provided, **Indicate when evaluations will occur during this project period, who will collect the data and how it will be collected. From the number of individuals to be served, estimate student outcomes in the program.**

Note: The Objectives, Activities and Evaluation narrative has a two page limit.

10 Budget Narrative and Budget Form

- Describe how the federal funds requested will be expended to conduct the planning and implementation of the proposal, using the provided detailed budget form and accompanying budget narrative form.
- When indirect costs are requested, the percentage must be negotiated IDC rate or 8%, whichever is the lesser amount.
- Although no match is required, describe what other funds, if any, will be used to achieve project objectives. **Specific statement must be made on non-supplanting of local or state funds.**

100 TOTAL MAXIMUM POINTS

Proposals that do not achieve at least 50 points will be disqualified. A proposal will be considered a "Qualified Plan" for rating ONLY if the Format for Proposals/Certificate and Assurances form is properly signed and included.

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**PERKINS CAREER AND TECHNICAL EDUCATION ACT OF 2006
OBJECTIVES, ACTIVITIES AND EVALUATION**

STATE INSTITUTIONS PROGRAM

OBJECTIVES	ACTIVITIES	EVALUATION

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Instructions for filling out a Budget Narrative

The Budget narrative is to follow the categories on the budget spreadsheet. This is a SAMPLE BUDGET NARRATIVE for you to refer to as you develop your own.

- For salaries, include a list of who is being paid, at what FTE and the total amount.
- Hourly wages – same as salaries
- Employee benefits – include a list of who is receiving benefits, what type of benefits, and how much is paid per benefit
- Consumable supplies – include a list of the types of supplies and the costs estimated with each. Please note that this category refers to items such as office supplies and while food may be considered consumable, it does not fit in this category.
- Minor equipment – the total cost for minor equipment must be under \$5,000.
- Travel – include a list of who is traveling, the mileage, lodging, meals, airfare, etc. Use the state approved reimbursement schedule. Mileage for use of a personal car is paid at 44.5 cents per mile if no state car is available and other conditions are met. Otherwise reimbursement is 23.5 cents per mile. In-state per diem is \$23 a day (\$5 breakfast, \$6 lunch, and \$12 dinner). Out of state per diem is \$36 per day (\$7 breakfast, \$11 lunch, and \$18 dinner). Lodging is \$60 in Montana. Out of state travel follows federal rates. If there is no receipt for lodging, the reimbursement rate is \$12 per night.
- Indirect costs – negotiated IDC rate or 8% whichever the lesser
- Major equipment – the total cost for major equipment must be over \$5,000.

If some line items are not applicable to your specific grant, then just enter \$0 or leave them off entirely. Additional questions contact Alyssa Townsend-Hudders at 406-444-0318.

Sample Budget Narrative-alter as needed

School Name
Program Name and Year

Personal Services

1. Salaries

Program Coordinator
.50 (Grade __) FTE \$ _____

Substitute Teachers
(needed when teachers are sent to meetings, trainings, conferences, etc.)
Approximately __ days at \$80 per school day \$ _____

Total Salaries \$ _____

2. Hourly Wages

Fiscal Manager (hourly rate multiplied by total hours)..... \$ _____

3. Employee Benefits

Program Coordinator
Health insurance \$ _____
PERS (rate __) \$ _____
FCIA (rate __) \$ _____
UCC (rate __) \$ _____

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IAB (rate ___) \$ _____

Fiscal Manager

Social Security (rate___) \$ _____

Retirement (rate ___) \$ _____

Worker's Comp (rate ___) \$ _____

Unemployment (rate ___) \$ _____

Total Employee Benefits \$ _____

4. Total Personal Services \$ _____

Operating Expenses

5. Contracted Services \$ _____

Website development and maintenance

6. Audit Costs \$ _____

Brief description

7. Consumable supplies

Office supplies \$ _____

Software/computer supplies \$ _____

Total Consumable supplies \$ _____

8. Minor Equipment (<\$,5000)

Laptop computer \$ _____

Software update \$ _____

Total Minor Equipment \$ _____

9. Printing

In house Xerox costs \$ _____

Newsletters and flyers \$ _____

Promotional materials \$ _____

Total Printing \$ _____

10. Postage and mailing \$ _____

11. Telephone

Monthly charge \$ _____

Long distance \$ _____

Cell phone \$ _____

Total Telephone \$ _____

12. Travel

State conference

Mileage (___ at an average of ___ miles x \$0.235 per mile) \$ _____

Lodging (___ rooms at \$60 per room) \$ _____

(Airfare ____, Lodging ____, Meals _____) \$ _____

13. Rent \$ _____

e.g. conference room

14. Utilities..... \$ _____

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15. Repair and maintenance \$ _____

16. Other \$ _____

17. Total Operating Expenses \$ _____

18. Indirect Costs (= < 8%) \$ _____

Indirect = negotiated IDC rate or 8% whichever the lesser

19. Major Equipment (=>\$5,000) \$ _____

Brief description

20. **Total Budget** \$ _____

IX. ADDENDUM

1. Response to Public Hearings

Response to Public Hearing comment referencing AA and AS Degree programs within the funding formula for postsecondary eligible recipients:

Perkins Act of 2006: Section 132 Distribution of funds for Postsecondary Education Programs

The state employs the following required formula for distributing funds to postsecondary eligible institutions:

- (a) (2) Formula.—Each eligible institution or consortium of eligible institutions shall be allocated an amount that bears the same relationship to the portion of funds made available under section 112 (a) (1) to carry out this section of any fiscal year as the sum of the number of individuals who are Federal Pell Grant recipients and recipients of assistance from the Bureau of Indian Affairs enrolled in programs meeting the requirements of section 135 offered by such institution or consortium in the preceding fiscal year bears to the sum of the number of such recipients enrolled in programs within the State for such year.

The State requires that postsecondary education programs that meet the requirements of Section 135—Local Uses of Funds will be those career and technical education programs that align with Board of Regent Policy 301.12 as per the taxonomy of the Associate of Applied Science degree and the Certificate of Applied Science degree as follows:

Degree and Certificate Designed for Employment.

1. The Associate of Applied Science degree combines applied and academic course work in a program of study designed to prepare students for career entry into a specific occupational area, as indicated by the degree title. The program design may combine a Certificate of Applied Science program with additional required courses or may be a distinct curriculum unrelated to any co-existing certificate program. With the exceptions noted in paragraph C.5, below, the Associate of Applied Science degree will have the following characteristics:
 - (a) a program of study (60-72 credits) requiring at least four semesters to complete, but no more than two academic years, including a summer session between the academic years if necessary;
 - (b) an occupational emphasis, achieved through a minimum of 2/3 of the total credits in the degree devoted to technical course work in the discipline specific to the occupational goal;
 - (c) general education or related education courses that meet accreditation requirements and that align with the amount and level of general education required in similar Associate of Applied Science degree programs in Montana.
2. The Certificate of Applied Science is a program of applied study primarily designed to prepare students for immediate employment in a job indicated by the

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certificate title. The certificate must ordinarily be approved by the Board of Regents under Board [Policy 303.1](#). With the exceptions noted in paragraph C.3 below, the Certificate of Applied Science is normally distinguished by the following characteristics:

- (a) a short program of study (30-45 total credits) with the expectation that the certificate can be completed in, at most, one calendar year;
- (b) general education coursework that meets accreditation requirements and comprises no more than 1/3rd of the total credits in the certificate program.

Note: Only named AA or AS programs will be considered CTE programs per section 2 of the section below.

Degrees Designed for Transfer—Taxonomy for AA and AS Degrees

1. The Associate of Arts or the Associate of Science degree is designed for transfer to a four-year institution. Except as provided in paragraph B.2 below, the degree title carries no designation of field of study and is normally limited to 60 credits, which includes an approved general education program that satisfies the requirements of Board [Policy 301.10](#).
2. In rare cases, a compelling, externally imposed requirement may justify more than 60 semester credit hours and/or a designated field of study in the degree title in an Associate of Arts or Associate of Science degree. The unit requesting such a modification of degree requirements should address its request to the Deputy Commissioner for Academic and Student Affairs. Upon receipt of such a request, the Deputy Commissioner shall refer it to the Two-Year Education Council for review and recommendation to the Academic and Student Affairs Committee of the Board of Regents. These designated degree programs may not satisfy Board [Policy 301.10](#) on general education because of the number of specialized courses that make up the degree.

PUBLIC HEARING

DRAFT MONTANA SIX-YEAR STATE PLAN FOR CAREER AND TECHNICAL EDUCATION ACT OF 2006 FOR PROGRAM YEARS 2008-2012

SUMMARY OF COMMENTS AND RECOMMENDATIONS

SUMMARY OF RESPONSES OF THE

OFFICE OF COMMISSIONER OF HIGHER EDUCATION

OFFICE OF PUBLIC INSTRUCTION

January 16, 2008, 9:00 p.m. – 12:00 and 1:00 p.m. – 4:00 p.m.

Helena College of Technology – MetNet Center

Helena, MT

PROCEDURE

The Public Hearing was conducted via two-way interactive video linking eight sites which were geographically distributed throughout the state. These sites included: Billings, Butte, Great Falls, Havre, Helena (originating site), Kalispell, Miles City and Missoula. This public hearing

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was attended by 37 individuals with the following distribution by site: Miles City (2), Missoula (5), Great Falls (6), Butte (11), Billings (2), Havre (2), and Helena (9).

All individuals wishing to speak had the opportunity to do so in the time allotted. Written comment was also submitted to the Office of Commissioner of Higher Education (OCHE) by Fax or email up to the deadline of January 28, 2008 at 5:00 p.m. Both the written and oral comments were representative of state legislators, state agencies, governor's office, community based organizations, tribal colleges, secondary schools and postsecondary institutions. The Presiding Officer for this hearing was Hans Meeder, consultant for Montana in development of the State Plan; also, it was transcribed verbatim by a professional court reporter (Attachment: Public Hearing Transcript).

Office of Public Instruction staff present at the sessions included: Robert Runkel, Assistant Superintendent and TJ Eyer, Division Administrator for Career and Technical Education. Office of Commissioner of Higher Education staff present at the sessions included: Dr. Arlene H. Parisot, State Director for Career and Technical Education; George Burns, Program Specialist; and, Alyssa Townsend-Hudders, Program Specialist.

SUMMARY OF COMMENTS, RECOMMENDATIONS AND RESPONSES

The written and oral comments and recommendations were reviewed and categorized by Section to facilitate the process of addressing the public input. The Hearing Officer (Hans Meeder) began by reading directly from the Purpose Section of the Perkins Act stating the core purposes of this legislation. The comments at the public hearing were taken by Section. This summary will address the comments in that order. *The comments provided in this report were either summarized when representative of a group of targeted concerns or were written as stated. The written comments are included as attachments.*

Section I: Planning, Coordination and Collaboration Prior to Plan

Submission

Oral and Written Comments

State Plan Advisory Committee Member and Community-Based Organization representative

Recommendation: include timeframe for review of the public hearing comments

Response:

The state plan will reflect this recommendation.

Montana Department of Labor and Industry—WIRED

Recommendation: coordinate with the WIRED initiative and Jobs for Montana's Graduates

Response:

The state plan will incorporate both WIRED and JMG in Section II (2.10).

Additionally, the State CTE Advisory Committee that will be established by Spring 08 will consist of six business and industry representatives for each of the six Cluster fields identified in the State Plan. The committee will include representatives from the various agencies described in the written comments. This advisory committee will assist the State CTE Executive Leadership Team responsible for the administration of Perkins funds to be responsive to the changing dynamics of the workplace.

Section II: Program Administration

Oral and Written Comments:

Tribal College Representative

Recommendation: That in the final state plan: (1) include Salish Kootenai College's (SKC) associate of arts and associate of science degrees associated with its six 2+2 programs as Perkins

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eligible programs: and (2) under the draft state plan, section 2.5 (“transition to Baccalaureate Programs,” pages 25-26) recognize that such two-year degree programs meet the spirit and intent of Goal III of the Board of Regents (BOR) Strategic Plan and are appropriate for transfer to SKC’s respective baccalaureate degree programs.

Response:

As the definition of eligible programs is not specifically addressed in the state plan, this recommendation will require guidance from the U.S. Department of Education and further discussion with the respective college.

Community-Based Organization Representative

I want to point out that throughout Section II, referencing special populations and the promising practices, that it is required to provide specific services and implementation of those services to the special populations.

Response:

The Promising Practices Initiative although mentioned in Section II, will be addressed in the State’s response to Section III.

Montana Department of Labor and Industry—Research and Analysis

Recommendation: Include reference to Section 118 Occupational and Employment Information.

Response:

This Recommendation will be included in Section II, 2.2.6.

Section III: Provision of Services for Special Populations

Oral and Written Comments:

Community-Based Organization Representatives (5)

Recommendations:

- Maintain the memorandum of understanding between the eligible state agencies and community-based organizations to provide services under Carl Perkins Rural Reserve continue throughout the six years of the Montana Perkins State Plan.
- Provide specific implementation plans for the Promising Practices Initiative
- Maintain funding for CBOs through an MOU or whatever written agreement we can have
- Include benchmarks, timelines, and number of strategies to be implemented and what secondary and postsecondary schools will be accountable to do for special populations in Montana. Also, dedicate specific dollars for services to pregnant teens.
- Include in State Plan how many representatives from each sub-group will constitute the CTE State Advisory Committee

State Legislators (8)

Recommendations: Maintain the MOU between the Eligible State Agencies and Community-Based Organizations throughout the entire six years of the Carl D. Perkins State Plan.

Office of Governor’s Deputy Chief of Staff

Recommendation: Please include CBOs for the life of the Carl D. Perkins Career and Technical Education State Plan. The office has been proud to be a site for the volunteer work experience for a member of the special populations targeted by the Carl D. Perkins Career and Technical Education State Plan. This is an individual who received office and computer skills gained from training funded through the Carl D. Perkins Rural Reserve.

Tribal College Representative

Recommendation: A significant portion of special populations will be denied services if we are not going to be able to count our students in the associate of science and associate of arts degree in the two-plus-two programs

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Response

This issue is addressed in Section II: State Administration

Montana Department of Labor and Industry—Billings Job Service (1)

Recommendation: Continue the MOU with the Community-Based Organizations throughout the 6 years of the State Plan.

Student

Recommendation: Do not eliminate funding support for programs that help clients in my situation (35 year old female, married with low income).

Secondary Teacher (3)

Recommendations:

- Do not continue the opportunity to fund these groups (CBOs) past the current Memorandum of Understanding that is in place.
- Use the reserve fund for the highest priorities
- Referring to the MOU between OCHE, OPI and Community-based organizations, this MOU was for a two-year period and should NOT be continued beyond this time period.
- Delete the last sentence in the fourth paragraph of page 58, Sec 6.1 – Reserve (Sec 112).

Response for Section III: Special Populations is consolidated to address the targeted concern of the above oral and written comments:

At the public hearings on the Perkins Act conducted on January 16, 2008, numerous representatives of community-based organizations (CBOs), as well as some elected state representatives and senators expressed support for the continued role of CBOs in providing services through Perkins Act funding. Recommendations in support of CBOs came forward in two forms: to extend the current Memorandum of Understanding (MOU) described below, or more generally, to allow CBOs to serve youths and adults with the support of Perkins Act funds. Recommendations from secondary representatives not in support of CBOs focused on the larger number of students served at the K12 level and that Reserve funds are dedicated to serving enrolled CTE students at the secondary and postsecondary level.

As background, Community-Based Organizations have a long history of receiving funds to serve special populations under Carl Perkins. Prior to 1998, under the Carl D. Perkins Act (Perkins II), CBOs were included under a provision calling for Gender Equity set-aside funds. Under Perkins II, CBOs were able to access funds directly.

When Perkins II was reauthorized in 1998 to become the Carl D. Perkins Vocational and Technical Education Act (Perkins III), the Gender Equity set-aside was eliminated and CBOs were no longer eligible recipients. Eligible recipients for reserve funds were now limited to secondary school districts and postsecondary institutions. At that time, the Reserve RFP specified that eligible recipients could partner with other educational entities to provide services through a competitive grant, but the eligible recipients must retain programmatic and fiscal responsibility.

During Perkins III, except for \$62,000 used to “hold harmless” secondary schools impacted by a change in formula, the remaining reserve funds were allocated through an RFP. Each grant included a CBO and an eligible recipient and it was competitive each year. The net effect of the partnerships between CBOs and eligible recipients was to allow the continuation of payments to CBOs to serve special populations although the payments needed to be channeled through eligible recipients to comply with Perkins III.

In 2006, Perkins was reauthorized to become the Carl D. Perkins Career and Technical Education Act, 2006 (Perkins IV). Under Perkins IV, as with Perkins III, the State had the

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option to take up to 10% Reserve fund or just allocate the full 85% to the eligible recipients—secondary schools and postsecondary institutions. Under Perkins III and IV, the state has taken the option to retain a Reserve fund. CBOs are not eligible recipients of Reserve funds and again there continues the concern for the possible elimination of earmarked funds for CBOs to serve special populations. This concern led to the Memorandum of Understanding that reserves \$180,000 per year in FY 08 and FY09 for CBOs to only serve special populations that are enrolled in CTE programs at the secondary and postsecondary level.

There are a number of conflicting demands for reserve funds under Perkins IV. These demands include increased focus on transition of students from secondary to postsecondary (programs of study), technical skill assessments for Career and technical Education (CTE) students, establishing a stringent accountability including the imposition of sanctions for low performance, increased academic rigor of CTE education, and improved academic performance of enrolled CTE special population students.

The above demands are creating additional pressure for OCHE and OPI to meet the new requirements of the law. Significant funds are needed to develop pathways to smooth the transition of students from high school into careers and for many students, transition to postsecondary education. In addition to the work that is required under Perkins IV to align coursework, there is a requirement for technical skill assessments. Meeting the requirements for these assessments alone is daunting.

Also, the State Plan list of Promising Practices for serving special populations is derived from a national assessment of what other states, particularly rural ones similar to Montana, were doing that improved the retention and completion rate of special population students enrolled in CTE programs at the secondary and postsecondary level. The *Promising Practices Initiative* is the result of this assessment and serves as suggestions to consider as activities are developed that may be designed specific to the needs of a particular community. Its purpose is to broaden rather than limit the options for meeting the needs of special populations in each of our Montana communities. The guidelines for implementation of a Promising Practices Initiative would be outlined in a Request for Proposal.

In recognizing the support of the Community-Based Organizations during the public hearing regarding the services provided to special populations; and, recognizing the constraints of the Carl D. Perkins Act of 2006, the State has determined that the following option would address the issues of all concerned while meeting the intent of the law:

The State is strongly committed to improving services for special populations and supporting the involvement of Montana-based non-profit organizations with established ties at the community level, where appropriate. Given the variety of priorities under the Perkins Act, the State CTE Executive Leadership Team believes a more flexible approach to annual decisions about the Reserve Funds is more appropriate than the current MOU would allow. Therefore, beginning with program year 2009-2010 through 2012-2013 (after the current MOU has expired), Montana will set aside \$180,000 on an annual basis (dependent upon the allocation of the federal funds) to support projects, on a competitive basis, that develop and refine strategies to successfully serve special populations. In each application submitted by a school district, a postsecondary institution, or jointly between two or more such entities, the applicant must demonstrate that one or more Montana-based non-profit organizations were given the opportunity to play a significant role in the project.

[Note: as the term community-based organization (CBO) is not formally defined, the term *Montana-based non-profit organization* will be utilized in the Montana Perkins Career and

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Technical Education Act of 2006. The new paragraph also uses the descriptive phrase “with established ties at the community level” to indicate the value of including organizations that demonstrate an ongoing commitment to meeting needs of the local community.

Section IV: Accountability and Evaluation

Oral and Written Comments:

Tribal College Representative

Recommendation: As the legislative language does not specify whether a degree has to be an associate of applied science degree, it is our opinion that associate degrees are entirely proper to offer as part of the CTE matriculation process based upon the language of the statute.

Response:

This recommendation is addressed in Section II: State Administration

Community-Based Organization Representative

Recommendation: Expand the language under Performance levels for Postsecondary/Adults under 4P1 for Student Placement to: “*Number of CTE concentrators who were placed or retained in employment, or placed in military service or apprenticeship programs in the 2nd quarter following the program year in which they left postsecondary education,*” to “*Number of participants*” to allow more individuals from special population groups to take part in a particular Perkins’ grant/project?

Response

The State Plan defines the CTE participant as a postsecondary/adult student who has earned one (1) or more credits in any CTE program. A CTE Concentrator must complete at least 12 academic or CTE credits within a single program area sequence that is comprised of 12 or more academic and technical credits and terminates in the award of an industry-recognized credential, a certificate or a degree; or completes a short-term CTE program sequence of less than 12 credit units that terminates in an industry-recognized credential, certificate or degree. The intent is that the student would have sufficient instruction to earn a recognized credential to be placed in employment, military or apprenticeship program.

Section V: Tech Prep

Oral and Written Comments:

FVCC Tech Prep Consortium

Recommendation: Include a single point of contact at each of those two organizations (OCHE/OPI) for the entire grant period and not just the start-up year.

Response:

Under the State Plan, the State CTE Executive Leadership Team will have direct line of communication with the Tech Prep staff at Flathead Valley Community College and MSU Billings College of Technology. To assign a single point of contact at both agencies would be duplicative responsibility. State staff will have direct contact with the Peaks to Plains Consortium at the local and state level. The intent is to provide a structure by which there is monthly communication between all staff, including the Consortium and the Leadership Team rather than inserting another layer of oversight.

Section VI: Financial Requirements

Oral and Written Comments:

Tribal College Representative

Recommendation: Pell and BIA students in the two-plus-two career and technical education programs continue to be counted in determining allocations for the local postsecondary programs and that this recommendation be adopted and expressed in the final plan and/or adopted and

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carried out in the administration of Perkins IV.

Response:

Addressed in Section II: State Administration

Community-Based Representative

Recommendation: Treat special populations programs equal to local recipient programs by allowing a six-year plan rather than yearly

Response:

The State Plan follows the guidelines set forth in the Perkins legislation.

“Each eligible agency shall evaluate annually, using the local adjusted levels of performance described in section 113 (b) (4), the career and technical education activities of each eligible recipient receiving funds under this title. If after reviewing the evaluation, the eligible agency determines that an eligible recipient failed to meet at least 90% of an agreed upon local adjusted level of performance for any of the core indicators of performance described in section 113 (b) (4), the eligible recipient shall develop and implement a program improvement plan...” Subsequent Action—the eligible agency may, after notice and opportunity for a hearing, withhold from the eligible recipient all, or a portion, of the eligible recipient’s allotment under this title if the eligible recipient—

(i) fails to implement an improvement plan

(ii) fails to make any improvement in meeting any of the local adjusted level of performance within the first year of implementation of its improvement plan

(iii) (iii) fails to meet at least 90% of an agreed upon local adjusted level of performance for the same core indicator of performance for 3 consecutive years.”

Additionally, the eligible recipients are responsible for providing the documentation of the services to special populations and the purpose of reviewing the data provided by the eligible recipient is to ensure funds are used for promising practices that have been found to be effective.

Secondary Teachers

Recommendation: Remove the language on Page 59, Section 6.1. in reference to the review of the administrative split between the Office of the Commissioner of Higher Education and the Office of Public Education.

Response:

The State Plan will reflect this recommendation.

Section VII. Certifications and Assurances

Oral and Written Comments:

Community-Based Organization Representative

Recommendation: Questions who was consulted in developing the Promising Practices Initiative and who will be working with them throughout the course of the plan to evaluate those promising practices.

Response:

Referenced in Section III: Special Populations

General

Oral and Written Comments:

Community-Based Organization Representatives

Recommendation:

- Support a committee to identify what the promising practices are and who is involved and what groups does it take to actually serve the special populations.
- Use another phrase for high skill, high wage, high demand occupations.

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- Questions the awarding of \$60,000 for a program to serve nontraditional students (16) that had previously been done with \$25,000 to serve (80).

Response:

The Promising Practices Initiative is addressed in Section III.

Response

The phrase “high-skill, high-wage or high-demand” is referenced throughout the Perkins IV legislation. Appendix 6 of the State Plan provides an explanation of the proposed criteria for determining Montana’s “high-skill, high-wage or high-demand” occupational programs.

Response:

The non-traditional fields grant allocation has remained the same for Perkins III and Perkins IV in many ways: a grant (or multiple), available in a specified amount to be competitively let through the Commissioner’s Office to support activities that encourage students to enter fields where individuals from one gender comprise less than 25 percent of the individuals employed in each occupation or field of work.

With the implementation of Perkins IV law, it was necessary to include a structured, statewide framework for these grants; namely, the in-depth, ongoing introduction of nontraditional fields (as determined using a state data table that gave the areas of greatest need for nontraditional concentrators) to this target population, with the inclusion of follow-up activities and specific assessment opportunities.

The current non-traditional fields grant was scored and awarded by a group of readers from throughout the state with no affinity to any particular proposal, as determined by the normal methodology used at OCHE for awarding grants competitively. By awarding the current grant the highest score, the readers indicate that the awarded grant most appropriately met the criteria required by the new Perkins law and as noted in the Non-traditional Fields Request for Proposal.

Tribal College Representative

I’d just like to emphasize that I believe that the apprenticeship programs, both federal and state, should be recognized within (Perkins) as possible agencies that are considered for funding and be recognized as a renowned training avenue that Montana students could undertake.

Response:

Section 113, Accountability, of the State Plan demonstrates the value of apprenticeship programs as follows: placement in military service or apprenticeship programs—is a core indicator of performance at the postsecondary level. Section 203 indicates that Tech Prep grants can be awarded to consortia between or among...a nonprofit institution of higher education that “offers a 2-year apprenticeship program that follows secondary education instruction...”

Community College President

The provision of services for this plan appears to be quite centralized in the Office of the Commissioner of Higher Education. In rural eastern Montana, we find that programs in the past that we have done through Perkins have been very effective when they are administered locally. Much of the plan includes high population areas; however, more of the economic need is in lower population areas, and those areas are receiving less under this plan. For clarification, the funding piece hasn’t necessarily diminished, but our ability to provide services under the formula isn’t as strong.

Response:

Section 121, State Administration of the Perkins law states: The responsibilities of an eligible agency (Montana Board of Regents)...includes the provision to coordinate the development,

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submission and implementation of the State plan, and the evaluation of the program, services, and activities assisted under this title (Title I). The legislation provides 5% of the Perkins funds for administration of which 68% is allocated to OPI and 32% to OCHE. The remaining funds are allocated as follows: 85% for local funds and 10% for State Leadership activities.

In regard to the allocation of funds for Postsecondary at the local level it is based on two factors: the number of Perkins Eligible Programs, and the number of students with a PELL or BIA award participating in the Perkins Eligible programs during the academic year. The formula was designed to distribute funds to give priority to institutions serving the most economically disadvantaged populations.

Governor's Office

Response:

As this letter addresses several areas of the State Plan, this response will follow the outline of the specific recommendations

Coordination with other federal education and training programs:

As written, the State Plan specifies that a State Career and Technical Education Advisory Committee is to be established by Spring 08 to consist of six business and industry representatives for each of the six Cluster fields identified in the State Plan. Six additional members will include representatives from state agencies. This advisory committee will assist the State CTE Executive Leadership Team responsible for the administration of Perkins funds to be responsive to the changing dynamics of the workplace and to coordinate with other federal education and training programs.

Competency-Based Applied Learning and Short-Term Training

As indicated below in the definition of CTE, competency-based applied learning is an important component of the legislation as is the development of contextual real world problem-solving that integrates academic and technical education.

Perkins IV does recognize that the adult student may not need a full degree program to reach his or her goal, but as the legislation measures completion as success, the individual defined as a CTE student would need to be enrolled in a program that leads toward a credential, certificate or degree. The Lineman Program in Butte does qualify as it leads to a certificate and its instruction is condensed into one semester rather than two.

Integration of Community-Based Organizations

This issue is fully addressed in Section III: Special Populations.

Definition of a CTE student

The definition of a CTE student is inherent in the federal definition of career and technical education in the Perkins Act which states:

“The term Career and Technical Education means organized educational activities that:

A) offer a sequence of courses that—

i) provides individuals with coherent and rigorous content aligned with challenging academic standards and relevant technical knowledge and skills needed to prepare for further education and careers in current and emerging professions;

ii) provides skill proficiency, and industry-recognized credential, a certificate, or an associate degree; and

iii) may include prerequisite courses (other than a remedial course) that meet the requirements of this subparagraph, and

B) include competency-based applied learning that contributes to the academic knowledge,

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higher-order reasoning and problem-solving skills, work attitudes, general employability skills, technical skills, and occupation-specific skills, and knowledge of all aspects of an industry, including entrepreneurship, of an individual.

Performance Indicators—WIA/Perkins

The Performance Indicators are set by the Perkins federal legislation. Although there have been several attempts at the congressional level to establish common measurements for federal programs under the U.S. Department of Education and the U.S. Department of Labor, this has not yet been accomplished.

Accountability

Perkins accountability staff members have worked tirelessly to minimize the burden on the local recipients in terms of data collection. A statewide fully electronic application and reporting database is now available. This system has been acknowledged at the national level as a best practice. Perkins has had an agreement with Montana DOLI Research and Analysis to share data and in coordination with Tech Prep will be able to link the secondary Tech Prep student by their unique identifier as they move to a postsecondary institution and into employment.

WIRED and Jobs for Montana's Graduates

The Perkins legislation does emphasize the importance of coordination with other federal education and training programs. Through the State Leadership structure that includes representation of the Department of Labor and Industry, both WIRED and Jobs for Montana's Graduates will be represented as part of the DOLI oversight of WIA and the JMG programs.

Use of BEAR/DOLI annual employer surveys

At the local level, these resources are utilized to assist in program development, knowledge and skill validation and employer satisfaction. As Perkins IV focuses on preparing students for high skill, high wage or high demand occupations, Perkins OCHE staff worked with DOLI to identify the criteria for these terms in regard to Montana's economic sectors. These criteria are listed in Appendix 6.

Local Uses

In the local applications, Montana requires eligible institutions to indicate the specific strategies of how they will provide equal access to special populations, including what specific services are available in their institution.