

SPECIFIC PROPOSED REVISIONS
TO
MONTANA'S PERKINS IV STATE PLAN

Presented to Montana Board of Regents

July 2010

Specific Proposed Revisions to Montana’s Perkins IV State Plan

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In 2007, 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~~ focused 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 2010, the lead institutions, *FVCC* and *MSU-Billings COT*, notified the Office of the Commissioner of Higher Education (OCHE) that they are not interested in extending the grant beyond June 30, 2010. After considering our options, Montana has decided to pursue rolling up Tech Prep (Title II) and will begin the formal public hearing process required for State Plan revision in the fall of 2010. Therefore, we are entering an interim year for our approach to Tech Prep. In the interim, Montana has two options for allocation of Tech Prep funds: posting a competitive RFP for another consortium or allocating Tech Prep funds by formula to all Perkins recipients. We propose using a formula-based process for 2010-2011 to create up to twelve regional Big Sky Pathways consortia to continue the work of the one consortium. This interim plan was endorsed by our State Plan Advisory Committee on April 22, 2010.

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.

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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 State Institutions

In accordance with the Perkins guidelines for allocation of State Leadership Funds [Section 112(A)(2)(A)], Montana will obligate ~~no less up to than .51% (approximately \$27,500)~~ of its State Leadership funds to implement career and technical educational program(s) to serve individuals residing at state correctional institutions ~~and or at~~ 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.

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~~20 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.

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 to administer Tech Prep from fall of 2007 to June 30, 2010. 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.

The lead institutions for the consortium, FVCC and MSU-Billings COT, have notified the Office of the Commissioner of Higher Education (OCHE) that they are not interested in extending the grant beyond June 30, 2010. After considering our options, Montana has decided to pursue rolling up Tech Prep (Title II) and will begin the formal public hearing process required for State Plan revision in the fall of 2010. Therefore, we are entering an interim year for our approach to Tech Prep. In the interim, Montana has two options for allocation of Tech Prep funds: posting a competitive RFP for another consortium or allocating Tech Prep funds by formula to all Perkins recipients. We propose using a formula-based process for 2010-2011 to create up to twelve regional Big Sky Pathways consortia to continue the work of the one consortium.

For the purposes of Perkins IV implementation, all of Montana is rural. For this reason the regional consortia will identify grant applicant demonstrated its institution would deliver distance learning opportunities 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. The Tech Prep consortia (up to twelve) will be required to include the statewide articulation agreements in their Big Sky Pathways that are developing at the regional level. These statewide 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

Through state-level efforts involving secondary and postsecondary educators, administrators, counselors, and representatives of business and industry, Montana has developed model Programs of Study, known as Big Sky Pathways, for each of the 16 career clusters. Local Perkins recipients are required to develop and offer at least one Big Sky Pathway. Because OPI CTE 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 Perkins secondary 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. Perkins postsecondary institutions will be held to the same standard and will be accountable to the OCHE Perkins Grants Manager.

During the start-up year of the Big Sky Pathways Consortium, OCHE staff will coordinate its the regional consortia activities and provide technical assistance as necessary. Each of the statewide-local Big Sky Pathways will have a specific OPI/OCHE program specialist assigned to work with developing and approving 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—

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- “(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 schools belonging to each regional Consortium indicated how it will:

- Fashion *Big Sky Pathways* ~~and with~~ related statewide 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-Participate in~~ 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.

Providing professional development opportunities for consortia members is a priority in the proposed regional consortia model. Opportunities include state-level meetings of content-specific postsecondary faculty leaders and multiple regional level meetings of postsecondary faculty, high school teachers, and high school counselors.

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~~ Members of the regional consortia 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.*”

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~~ OPI and OCHE for incorporation into the State Database. Using these definitions of participating Tech Prep students, high school and colleges ~~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;

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- 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 OPI and OCHE~~ 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. ~~Up to 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-

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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 up to 0.5-1 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:

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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**— up to 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 or allocated by formula to all Perkins recipients.
- **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 than~~ up to .5%-1% 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.

INTERIM BIG SKY PATHWAYS CONSORTIA FOR 2010-2011

Approved by Montana's State Plan Advisory Team April 23, 2010

Background

Montana's current Tech Prep consortium grant ends June 30, 2010. The lead institutions for the consortium, FVCC and MSU-Billings COT, notified the Office of the Commissioner of Higher Education (OCHE) at the turn of the year that they are not interested in extending the grant beyond June. As OCHE and OPI have explored options for what happens with Tech Prep after June, communications from the Office of Vocational and Adult Education strongly indicate that separate Tech Prep funding will end by July 2011. Therefore, we are entering an interim year for our approach to Tech Prep. In the interim, Montana has two options for allocation of Tech Prep funds: posting a competitive RFP for another consortium or allocating Tech Prep funds by formula to all Perkins recipients. We propose using a formula-based process next year to create several consortia focused solely on developing or improving/expanding the programs of study that are a major emphasis of the Carl D. Perkins Career and Technical Education Act of 2006 (Perkins IV). This is work that Perkins-funded institutions must do anyway, and additional funding would support their efforts.

Perkins IV calls for states to offer "career and technical programs of study "to guide students and their parents when planning for and completing future coursework." These programs, at a minimum, must:

- Incorporate and align secondary and postsecondary education elements,
- Include academic and CTE content in a coordinated, non-duplicative progression of courses,
- Offer the opportunity, where appropriate, for secondary students to acquire postsecondary credits, and
- Lead to an industry-recognized credential or certificate at the postsecondary level, or an associate or baccalaureate degree.

To be eligible for Perkins IV funds, each local recipient of Perkins funds must offer at least one career and technical program of study.

Progress on Programs of Study

In the past three years, Montana's Tech Prep consortium has laid the foundation for the development of the programs of study. Templates have been created for Big Sky Pathways—a recommended sequence of courses based on a student's personal interests and career goals. These templates (one for each of the 16 career clusters) for Big Sky Pathways are based on the work of the States' Career Clusters initiative and were completed in February 2009. The templates for Big Sky Pathways may be viewed and downloaded at <http://mus.edu/wd/WhatAreBSP.asp>.

OPI and OCHE have partnered with the Department of Labor to include Big Sky Pathways and the capacity to develop individual Big Sky Pathway MAPs (Montana Achievement Plans) in Montana's Career Information System (MCIS). The completion of programs of study at each high school that can be formatted as MAPs in MCIS is essential to the ultimate effectiveness of that career and curriculum advising tool.

The next step, then, which many high schools and colleges have already undertaken, is for secondary and postsecondary partners to create specific programs of study articulating a non-duplicative progression of courses beginning in the high school and continuing through a two-year degree program

and entering the programs of study into MCIS. The programs of study should include the statewide articulations for CTE College Credit, as well as dual enrollment opportunities already developed through Tech Prep and other initiatives.

Making significant progress in that next step is the focus of this proposal for the use of Tech Prep funds in the interim year between the separate use of Tech Prep funds articulated in Montana's State Plan and the anticipated "roll-up" into Perkins. We anticipate conducting public hearings on the "roll-up" in late 2010 or early 2011.

Brief Description of Proposal

- Colleges and high schools will be funded for the development or expansion/improvement of programs of study above and beyond the funding provided in their basic Perkins grants. By formula, approximately \$400,000 of "Tech Prep" funds will be allocated proportionally to fund 12 regional consortia headed up by Perkins-eligible colleges. The 12 consortia colleges are: Blackfeet, Dawson, Fort Peck, FVCC, Miles, MSU-Billings COT, MSU-Great Falls, MSU-Northern, MT Tech COT, Salish-Kootenai, UM-Helena and UM-Missoula COT.
- Each consortium will include Perkins-eligible high schools and a Perkins-eligible college, with the college overseeing the process. Colleges wishing to partner as a consortium on a particular program of study are encouraged to do so.
- Each high school will collaborate with a college partner in reasonable proximity to craft one Big Sky Pathway specific to the high school. Each Big Sky Pathway team will consist of at least one secondary pathway-specific teacher, one secondary counselor, one pathway-specific college faculty member, and a college advisor. The college may designate either the advisor or the faculty member as the articulation coordinator. To raise counselors' awareness and understanding of programs of study, school districts are encouraged to engage more than one counselor in consortium efforts.
- When complete, each Big Sky Pathway will be approved by the high school principal, college academic officer or department head, an OPI CTE specialist, and appropriate members of the both the high school and college advisory committees.
- Each Big Sky Pathway will be entered into the MCIS system to create a statewide database; however, high schools and colleges using other systems will no doubt wish to enter the Pathway into their own system as well
- Funds will be available to develop up to six more Big Sky Pathways if a high school so chooses.

Outcomes

- Create partnerships between secondary and post-secondary faculty at the regional level.
- Involve secondary counselors in the development and implementation of Big Sky Pathways.
- Develop MCIS as a statewide database of programs of study and a web-based guidance tool that provides assessment resources, postsecondary and career information, Big Sky Pathways for each high school, and an individual electronic planning portfolio (Big Sky Pathway MAP).
- Align curriculum from grades 9-12 and from secondary to postsecondary education (vertical curriculum alignment).
- Support the development of integrated academic and career and technical curriculum and instruction (horizontal curriculum alignment).
- Engage program advisory committees in the development and promotion of Big Sky Pathways and programs of study.

- Inform counselors, teachers, students, and parents of all opportunities for student to earn postsecondary credit for coursework taken during high school.
- Increase participation in statewide CTE College Credit course articulations as well as other dual enrollment and other facilitated pathways from high school to college.
- Establish a framework to sustain the development and implementation of Big Sky Pathways beyond the required one program of study.

How It Will Happen

- A. All high schools and colleges that are recipients of Perkins funds will be required to submit evidence of ONE local Big Sky Pathway by June 2011. All BSP 2010-11 consortium participants will be required to submit completed BSPs for all funded programs of study.
- B. By May 12, 2010, all Perkins-eligible colleges will be asked to:
 1. Identify the Big Sky Pathways they will seek to develop or improve/expand with regional high schools. (There is no limit on the number of programs.)
 2. Identify the faculty member and advisor who will represent the college in the development of each BSP.
Alternatively, indicate that the college is opting out of the interim BSP process and will not receive additional funding for BSP development. If a college chooses this option, the college is still responsible for submitting the one required BSP by June 2011.
- C. By June 15, 2010, high schools will be asked to:
 1. Use the potential BSPs identified by the colleges to identify the Big Sky Pathway (BSP) they want to develop or improve/expand first and which college they will partner with to achieve this purpose. High schools will be asked to choose a college in reasonable proximity to the high school.
 2. Identify and prioritize up to six (6) more BSPs they are interested in developing with a college reasonably nearby. Because not every college offers a program in every BSP, it is possible that high schools will partner with multiple colleges in developing BSPs.
 3. Alternatively, indicate that they are opting out of the interim BSP process and related funding. If a school chooses this option, the school is still responsible for submitting the one required BSP by June 2011.
- D. In June 2010, OPI and OCHE will consult with participating colleges to identify each consortium based on the information submitted by the high schools and develop a schedule for the development of BSPs. By August 1, the schedule will be communicated to all participating high schools and colleges.
- E. Faculty Training
 1. Each college will identify a faculty member to be a lead for a specific pathway. Lead faculty members will meet in Helena for one to two days for collaboration and training (the first training session will be no later than September).
 2. It is anticipated that there will be 7-16 state-level faculty training sessions. Each training session will be specific to a Big Sky Pathway.
 3. Each participant will be given a manual developed by OCHE and OPI to facilitate the local efforts.

F. Funding

1. Each college will receive funding based on the number of participating high schools. The funding will pay for (a) faculty coordination and meeting facilitation and (b) reimbursement to high schools for substitute costs and mileage for high school faculty.
2. High schools will receive reimbursement from the college for substitute costs and mileage for the participation of one content-specific teacher and a guidance counselor for two all-day meetings for each BSP. When participation of additional counselors does not add to budgeted costs, high schools are encouraged to send more than one counselor. Also, administrators are welcome.

G. Meetings will be scheduled to allow enough time for the high school to complete the work required between meeting one and meeting two.

1. Meeting One :

Clarification of expectations

Overview of Big Sky Pathways (how to use the state-level template to design a customized high school BSP)

Content Standards, Knowledge and Skill Statements, and Industry Standards

Role of Advisory Committee

MCIS as a guidance delivery tool

Postsecondary credit opportunities

Dialogue between secondary teachers and post-secondary faculty

High school teacher/counselor homework:

Work with appropriate faculty and local program advisory committee for input and bring a draft of BSP to next meeting.

2. Meeting Two:

Dialogue about the homework

Peer review of proposed Big Sky Pathways

Secondary/postsecondary faculty preliminary approval of the BSP

Enter Big Sky Pathway into MCIS

Complete paperwork for substitute pay and mileage reimbursement from college

Follow-up:

Approval of BSPs by high school principal, college chief academic officer, an OPI CTE specialist, and appropriate representatives of secondary/postsecondary program advisory councils.

Reserve fund allocation:

After a high school has completed the required one Big Sky Pathway, there is additional funding to develop up to six more.

Using the same funding formula as described for the first Big Sky Pathway, high schools will be reimbursed for the participation of one counselor and one content-specific teacher. Because of funding capacity, there is funding to develop only six Big Sky Pathways beyond the one required (7 total).

Funding formula:

The formula is based on 12 colleges and 200 possible high schools. Funding may be adjusted to pay for more BSPs based on the number of high schools and colleges choosing to opt out. Fewer participating schools and colleges means more funds will be available for participating institutions. Although the formula uses calculations for high school expenses and college responsibilities, the allocation will be provided to the college coordinating each consortium for disbursement.

Funding based on 200 high schools and 12 colleges. Capacity for one required and six optional.		RESERVE Funds	TECH PREP Funds	POSTSECONDARY LOCAL AP CARRYOVER	TOTAL
FUNDING for HIGH SCHOOL EXPENSES (7 possible programs of study)	FIRST BSP 200 high schools @ \$325 each		\$65,000		\$65,000
	UP TO 6 MORE BSP 200 high schools @ \$325 each	\$335,000	\$55,000		\$390,000
FUNDING for COLLEGE RESPONSIBILITIES (7 possible programs of study)	Colleges will receive \$260 per high school per BSP (up to 6)		\$280,610	\$84,390	\$365,000
TOTAL		\$335,000	\$400,610	\$84,390	\$820,000

Example: FVCC works with 13 high schools to develop a BSP in Finance. FVCC will receive up to \$7,605 to oversee the development of the Finance BSP. Of that amount, \$3,380 (\$260 x 13) will fund the college’s expenses for fiscal management of high school reimbursements and compensation of the college faculty member planning, coordinating and facilitating two meetings with the teachers. The remainder, a total of \$4,225 (13 high schools at approximately \$325 each), will be used to reimburse each of the 13 high schools for subs and mileage to cover two meetings.

State Plan Advisory Team

- Mark Branger, Huntley Project School District
- Kevin Brockbank, UM-Helena
- Jasyn Harrington, CTI, Helena
- Vicki Judd, Missoula Community Relations Manager, NorthWestern Energy
- Tom Kotynski, Great Falls Public Schools
- Cleo Sutton, NCCER Trainer

- The following pages are from the first revision submission

MONTANA MULTI-YEAR STATE PLAN 2008-12

- 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 up to 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.

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. Up to 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 up to 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.

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**— up to 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 than up to .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.

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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 up to 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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- 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 up to 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?