# Montana Flex2020 Task Force Report: Recommended New Flexibilities

JULY 1, 2020

**Montana Office of Public Instruction**

FLEXIBILITY FOR SUCCESS
2020
FLEX
Montana Office of Public Instruction

## Introduction

This report was designed to summarize the Flex2020 Task Force recommended flexibilities for reopening schools in the Fall of 2020.  It is intended to help the Montana Office of Public Instruction (OPI) communicate the flexibility considerations that a collaborative group of Montana education stakeholders discussed which may reduce policy burden or provide relief to schools.  The information in this report may be helpful for formulating or documenting waiver considerations or policy enhancement in the future.

*Disclaimer: This document is not a legal document or an exhaustive list of actions that the OPI will need to consider.  This document is for general informational purposes only and should not be construed as advice, requirements, or mandate.  The information provided in this document is intended solely as means to communicate with educational stakeholders and does not impose or imply any legal or regulatory requirements. This document does not substitute for any law or regulations.

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## In this Guide

## See Also

Montana High-Quality Reopening Guidance Document-Key Flexibility Section

## Flex2020 Task Force Purpose

The Flex2020 Task Force was initiated by Superintendent Elsie Arntzen to assist in identifying the internal and external flexibilities that schools will need to serve students in the new educational environment as a result of novel coronavirus (COVID-19) pandemic in 2020. The current state and federal policy landscape was built to service a more traditional school model, in which, the COVID-19 outbreak has highlighted the various forms of friction between what educators need to enable and empower continuity of learning and what policy encourages or allows. Flexibilities may provide relief from state and federal policies that can unintentionally prevent necessary instructional decisions and present educators with barriers that impede student learning. Flexibilities may allow students to keep on learning and educators to rethink and transform local education, drive meaningful change, build capacity, and support student health and well-being.

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**Why was the Flex2020 Task Force formed? What was the overall purpose?**
- To focus on flexibilities that promote opportunities for student success;
- To clarify and communicate existing policy flexibility; and
- To consider potential waivers in key policy areas to enhance learning experiences as our schools prepare for the Fall of the 2020–2021 school year.

**What were the critical documents or outputs from the Task Force?**
> At the end of the three sessions, each of the five subgroups provided a list of recommendations to Superintendent Elsie Arntzen for immediate consideration.

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## Flex2020 Task Force Process

How was the Task Force conducted? The OPI facilitated the following activities to maximum stakeholder engagement and recommendations to the OPI:

- Hosted three one-hour sessions: May 20, June 3, and June 10, 2020.

- The Task Force members worked within in five subgroups to prioritize and build consensus on recommendations. The subgroups were as follows:
  - Strengthening Existing Policy Flexibility
  - Evaluating Progress and Impact of State Graduation, Credit, Funding, Licensure, and Accreditation Policies
  - Maximizing Flexibilities in Assessment, Accountability and Reporting Systems
  - Fostering and Supporting Local Innovation
  - Leveraging Federal Flexibilities and Resources

- Between meetings, Task Force members researched, gathered input, and reflected on essential questions for identified subgroup focus areas.

- Task Force members collaborated on recommendations for the Superintendent Elsie Arntzen for immediate consideration and rapid response.

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## Flex2020 Task Force Members

The virtual sessions and intersession work was conducted with 33 representatives that included school district leadership, the Board of Public Education (BPE), Montana School Boards Association (MTSBA), School Administrators of Montana (SAM), Montana Quality Education Coalition (MQEC) , legislators, legislative services, former school board members and OPI staff.

**Task Force Facilitator**: Dr. Julie Murgel, ESSA Coordinator at the OPI
**Task Force Members:**
Bruce Grubbs, Representative of the Montana Legislative Education Interim Committee
Tammy Lacey, Vice-Chair of the Board of Public Education
Peter Donovan, Executive Director of the Board of Public Education
Lance Melton, The Montana School Boards Association
Kirk Miller, Executive Director of the School Administrators of Montana
Dianne Burke, Executive Director of the Montana Quality Education Coalition
Tracy Moseman, Chief Program Officer at the OPI
Kristine Thatcher, Director of Licensure at the OPI
Dustin Shipman, Superintendent at Big Sky Schools
Allison Evertz, Superintendent at Joliet Public Schools
Tom Korst, Superintendent at Hamilton Public Schools
Laurie Barron, Superintendent at Evergreen Schools
Corinna Guardipee-Hall, Superintendent at Browning Schools
Loverty Erickson, Superintendent at Wolf Point Schools
Kim Anthony, Executive Director at Billings Public Schools K-8
Jon Martin, Superintendent at Noxon Schools
Jon Konen, Principal at Great Falls Public Schools
Godfrey Saunders, Superintendent at Belgrade Public Schools
Wade Sundby, Superintendent at Glasgow Public Schools
Greg Dern, Superintendent at Roy Public Schools
Heather Hoyer, Assistant Superintendent at Great Falls Public Schools
Joe Steele, Superintendent at St. Regis Public Schools
Monte Silk, Superintendent at Sidney Public Schools

Dinny Bennett, Superintendent at Forsyth Public Schools
Les Meyer, Superintendent at Fairfield Public Schools
Tobin Novasio, Superintendent at Lockwood Public Schools
Sharyl Allen, Deputy Superintendent at the OPI
Anne Bauer, Project Manager at the OPI
Lona Running Wolf, Director of American Indian Student Achievement at the OPI
Jason Butcher, Outreach Director at Reach Higher Montana
Heather Jarrett, Superintendent at Reed Point Public Schools
Mike Perry, Superintendent at Hot Springs Public Schools
Pad McCracken, Research Analyst for the Montana Legislative Office of Research and Policy
Analysis and Education Interim Committee Lead Staff

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## Flex2020 Task Force Materials

Posted on the OPI Webpage under the **Flex Task Force Tab** are all the materials relevant to the Task Force:

- o Meeting Minutes and Recording Links
- o Agendas
- o Materials: Presentations and Resource Tools
- o Subgroup Recommendations

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## Existing Flexibilities and Current Federal Waivers

One particular Task Force subgroup focused on **existing flexibilities** and formed two recommendations that have been outlined and provided in the "Montana High Quality Reopening Guidance" document.  Specifically, the document provides guidance for where flexibilities exist within Montana Annotated Code (MCA) and statute that could be beneficial as  schools re-open and navigate potential complexities presented by the COVID-19 pandemic.

The two recommendations addressed in the guidance document are:
- Provide a holistic current flexibility cross walk.
- Produce a one-page summary of the flexibilities available in licensure.

**Link:  Montana High Quality Reopening Guidance Document**

Additionally, the OPI has applied, received, and is continuing to seek flexibility through waivers under the Elementary and Secondary Education Act (ESEA) of 1965 as amended as the Every Student Succeeds Act (ESSA) in 2015. The 2020 **current federal waivers** are important as they provide school districts with some relief and the ability to focus locally on the basic educational services and needs of students.

To date the OPI has received waivers for the following requirements (see the **USED Waiver Granted Letter**):
- **Assessment requirements** in section 1111(b)(2) for the school year 2019-2020.
- **Accountability and school identification requirements** in sections 1111(c)(4) and 1111(d)(2)(C)-(D) that are based on data from the 2019-2020 school year.
- **Report card provisions** related to assessments and accountability in section 1111(h) based on data from the 2019-2020 school year.

The OPI also received approval for the **Fiscal Flexibility** waiver which provides flexibility in the use of funds and other requirements covered under ESEA including the Title I, Parts A–D, Title II, Title III, Part A, Title IV, Parts A–B, and Title V programs.

> **This Public Comment site is intended to provide information to the public on what the waivers mean today, and in the future, and how the public can engage in the discussion through the Public Comment Process.**

### Flex2020 Task Force Final Recommendations
The final recommendations from the Task Force subgroups are outlined within the five subgroup focus areas:
- Strengthening Existing Policy Flexibility
- Evaluating Progress and Impact of State Graduation, Credit, Funding, Licensure, and Accreditation Policies
- Maximizing Flexibilities in Assessment, Accountability and Reporting Systems
- Fostering and Supporting Local Innovation
- Leveraging Federal Flexibilities and Resources

**A. Strengthening Existing Policy Flexibility:**
1. Provide a holistic current flexibility cross walk guidance document, including a one-page summary of the flexibilities available in licensure.
2. Lead efforts to eliminate aggregate hours.

**B.  Evaluating Progress and Impact of State Graduation, Credit, Funding, Licensure, and Accreditation Policies:**

1. Request the development of flexibility within the accreditation variances of standards and review board process.

   **1.1.** Flexibility within accreditation standards for districts to request an Accommodation to temporarily reassign an FTE for COVID-19 response.

   **1.2.** Give emergency authorization to allow a currently licensed educator to teach a course in another subject area in which they are not endorsed but have significant experience or some level of academic qualifications.

2. Develop guidance to accommodate teachers in a high-risk health category with regards to in-person, blended, and remote learning models.

3. Leverage policy and funding to get technology to students.

**C.  Maximizing Flexibilities in Assessment, Accountability and Reporting Systems**

1. Develop and seek federal waivers for:

   **1.1** Standardized assessment requirements for 2020-2021 school year; and

   **1.2** Report card provisions

2. Develop and pursue an addendum to the Montana Consolidated State Plan under ESSA to use local assessments to measure and report student academic growth rather than federal mandated/state mandated testing, which is needed to evaluate Comprehensive Support and Improvement (CSI), Targeted Support and Improvement (TSI), and Additional Targeted Support and Improvement (ATSI) exit criteria.

3. Draft and seek an amendment to the Montana Consolidated State Plan under ESSA for the accountability system that is used to meaningful determine improvement status.

**D.  Fostering and Supporting Local Innovation**

1. Pursue an enhanced partnership with Montana Digital Academy (MDA) to support remote learning.

2. Expand the Transformational Learning Bill for remote and blended learning models.

3. Support legislative considerations or a waiver process that empowers school districts to design their own innovative paradigm/model that fits their community needs; bundles local, state, and federal flexibilities; and provides time for school communities to plan, implement and evaluate the new paradigm.

**E.  Leveraging Federal Flexibilities and Resources**

1. Funding flexibility for Title I, Part A to address eligibility and carry-over; and

2. Funding flexibility for Nutrition.

## Action Plans for Recommended New Flexibilities

After the new flexibilities were identified, Task Force members prioritized them using the following matrix:

|  | DO NOW | DO LATER |
|---|---|---|
| **CRUCIAL** | crucial & do now [like right now] | crucial but do later [do soon] |
| **NOT CRUCIAL** | not crucial but do now [delegate] | uncategorized [delete or move] |

*Source: Appfluence.com*

Then, Task Force members and the OPI staff outlined draft action plans to consider why, what, when, how, and who could implement the new flexibilities that were identified as "crucial-do now".  The action plans included the following questions and are provided in table format within this summary report.

- What do we need to do?
- Who needs to be involved to enact the flexibilities?
- How long will it take to implement the flexibility?
- What are the stakeholder requirements?
- What resources would be needed?
- What are the risks involved in enacting the flexibility?
- What are the implications on student success?

# FLEX 2020 Task Force Action Plans

## GROUP A: Strengthening Existing Policy Flexibility

| GROUP A<br><br>FLEX 1 | Provide a Holistic CURRENT FLEXIBILITIES Cross Walk Guidance Document | |
|---|---|---|
| WHEN | Complete by July, 2020 | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Create the flex document that includes current flexibilities, including a one-page summary of the flexibilities available in licensure.<br><br>Publish the flex document within the "Reopening Guidance Document".<br><br>Implement with webinars, workshops, etc.<br><br>Measure effects of "Guidance Document" on student learning. | OPI Senior Leadership; Designated OPI staff; MTSBA; and ED Northwest | Enhance administrators' planning efforts to address school-specific needs by communicating where flexibilities exist within code and statute, while clarifying how current flexibilities could be beneficial to open schools and navigate potential complexities presented by COVID-19. |

| GROUP A<br><br>FLEX 2 | Eliminate Aggregate Hours Requirement | |
|---|---|---|
| WHEN | July 1, 2023 for 2023-2024 School Year | |
| WHAT | RESOURCES | WHY |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Develop guidance on existing flexibilities regarding aggregate hours (waivers).<br><br>Develop key questions about eliminating aggregate hours.<br><br>Develop a Task Force to dig deeper into the implications of eliminating aggregate hours.<br><br>Develop a legislative bill for 2023 session for eliminating aggregate hours. Find a Legislator to carry the bill. | OPI Senior Leadership, Designated OPI staff, MTSBA, Montana Public Education Center (MT-PEC), and ED Northwest | In order to promote deeper learning and a more flexible education models that responds to varying-diverse student needs, a shift away from time dependent models is needed.<br><br>The reliance on the Carnegie Unit as a measure of student progress toward a diploma, stressing the amount of time students spend in the classroom, or standardization of student-teacher contact time, does not determine the quality of student learning nor encourage more development of attributes within a graduate profile.<br><br>Roughly half of Montana students are not demonstrating proficiency, yet most all of them move on to the next grade level. |

## Group B: Progress and Impact of State Graduation, Credit, Funding, Licensure, and Accreditation Policies

| GROUP B FLEX 1.1 | Flexibility within accreditation standards for districts to request an accommodation to temporarily reassign an FTE for COVID-19 response. | |
|---|---|---|
| WHEN | July for policy development; applications accepted August | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Develop a review process.  Communicate the process with school districts.  Invite and process accommodation requests. | BPE, Certification Standards and Practices Advisory Council (CSPAC), OPI Accreditation, OPI Licensure, Montana Small School Alliance (MSSA), Montana Rural Education Association (MREA), Montana Federation of Public Employees (MFPE), MTSBA, SAM, MQEC, and Montana Association of School Superintendents (MASS) representation. | A school district needs to respond to social, emotional, and behavioral impacts on students by hiring a social worker/school counselor and does not have the money to hire an additional staff member. The school district has an opening for a library media specialist and believes mental health is more urgent than information literacy when bringing students back to school. The school district wants to hire a social worker instead of a librarian and not receive an Accreditation deviation. |

| GROUP B<br><br>FLEX 1.2 | Give emergency authorization to allow a currently licensed educator to teach a course in another subject area in which they are not endorsed but have significant experience or some level of academic qualifications. | |
|---|---|---|
| WHEN | Draft by July 2021 BPE meeting | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Allow a COVID-19 accommodation to the existing Emergency Authorization rule found under ARM 10.57.107. | OPI Licensure and BPE | A school district has exhausted all possibilities of filling a vacant position with an appropriately licensed and endorsed educator.  They have an existing licensed educator endorsed in a different subject area, but that has knowledge and or experience/expertise in the subject area of the vacancy.  This educator is willing and wants to fill the vacancy need. |

| GROUP B<br><br>FLEX 2 | Accommodating remote instruction delivery by teachers in the high-risk health category who can't come in the classroom and by master teachers to model and share innovative practices. | |
| --- | --- | --- |
| **WHEN** | August for guidance and policy development<br>Fall for dissemination | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Create policy using ARM 10.55.907 as a reference that addresses a classroom monitor, dedicated instruction hours, best practices, and possible funding avenues to pay for the additional staff needed.<br><br>Develop guidance documents, webinars, and links to other professional development related to classroom delivery, best practices, monitoring student learning, etc.<br><br>Provide technical support for schools as they implement. | OPI Accreditation, OPI Senior Leadership , OPI Legal staff, MSSA, Prickly Pear Curriculum Consortium, the Regional Education Service Areas, Curriculum Consortium Network, MFPE, SAM, and MQEC | A teacher can't be physically located in a classroom because they, or a family member they care for, is in the high-risk health category; and an innovative mentor teacher instructs a large class remotely and mentee teachers facilitate in person, thereby getting hands-on PD in successful online learning tools and practices |

| GROUP B<br>FLEX 3 | Getting technology, internet, and remote education access to students | |
|---|---|---|
| **WHEN** | By July 2021 for start of 21-22 school year | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Leverage federal telecom funding and assistance programs, like E-Rate.<br><br>Get legislation to move tech levy from voted to permissive - Extend sunset on the tech levy.<br><br>Provide guidance to districts to use existing funding flexibilities to put money into tech.<br><br>Design a common platform for online delivery with security protocols.<br><br>Create a new VisionNet to facilitate teacher sharing among districts.<br><br>Enable Accreditation to accommodate teacher sharing among districts, specifically, the FTE in the Terms of Employment, Accreditation, and Master Schedule (TEAMS) report.<br><br>Develop guidance for negotiating teacher sharing. | A committed legislator to carry the bill; OPI Content Standards, OPI Data and Technology, OPI Legal, OPI Senior Leadership, OPI School Finance; SAM, MSBA, MFPE and BPE | Inequality of access leads to inequality of outcomes in education.<br><br>Students need devices and internet access to join in remote learning |

## Group C: Maximizing Flexibilities in Assessment, Accountability and Reporting Systems

| GROUP C FLEX 1.1 | Develop and seek federal waivers for standardized assessment requirements for 2020-2021 school year | |
|---|---|---|
| WHEN | October 2020 | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Gather input from the summary report from the Public Comment Process that concluded on July 17th.<br><br>Learn together and see what next 2 months of school look like.<br><br>Allow our schools to catch-up and focus on ensuring that our most vulnerable students are getting access to instruction and services.<br><br>Determine and establish a way to resume the priorities and requirements of ESSA.<br><br>By October 2020, establish if a targeted waiver is necessary to waive standardized assessment for the 2020-2021 school year. | OPI Senior Leadership; OPI ESSA Coordinator; and OPI Assessment Director | The U.S. Education Department (USED) has indicated that is too early and they are not reviewing waivers at this time for the 2021 school year.<br><br>Regardless of the future waivers, based on this last Spring, we will be starting over again to have reliable, standardized data.<br><br>Both achievement and growth are necessary for equity and fairness. Growth and achievement measure are different things and support different students. We need both or the information is biased. |

| GROUP C FLEX 1.2 | Develop and seek a federal waiver to not issue a 2019-2020 Report Card. | |
|---|---|---|
| WHEN | October 2020 | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Draft and submit a waiver to USED for ESSA statutory and regulatory requirements for all report card provisions. | OPI Senior Leadership, Waiver survey, ESSA Coordinator, and Data Project Manager | Since the academic proficiency and progress data will not be available, many components of the Report Card will be excluded.  Leaving the report card to be less relevant and absent of the most critical data to share with families and communities regarding the quality of schools.<br><br>This leaves only some data to report: Graduation rates, post-secondary enrollment, attendance rates, educator qualification, civil rights information, per-pupil expenditures, National Assessment of Educational Progress (NAEP) results and 1003-school improvement funding.<br><br>Since we don't know the effect that the COVID-19 pandemic had upon students especially regarding graduation and attendance, the report card data may be unreliable.<br><br>There is not a required deadline to post the report card and states may adjust the format of the report card as necessary given COVID-19.<br><br>Since the department will not be collecting many ED*Fact* files for the 2019-2020, the state should also consider collecting and reporting less data. |

| GROUP C, FLEX 2 | Support the use of local assessments to provide urgent information about student learning.  Then, develop and pursue an addendum to the Montana Consolidated State Plan under ESSA to use local assessments to measure and report student academic growth, which is needed to evaluate CSI, TSI, and ATSI exit criteria. | |
|---|---|---|
| **WHEN** | In Progress – Interim Assessments finish in February 2021 Addendum-Anticipated due date in late 2020 | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Provide a "Quick Start Series' for Local Education Agencies (LEAs) to guide them in implementing the interim assessment.

Administer Interim Comprehensive Assessments (ICAs) to all students to determine individual learning plans.

Use Interim Assessment Blocks (IBAs) to identify personalized learning needs and link to lesson plans. | OPI Assessment Division, OPI Senior Leadership; OPI ESSA Coordinator; OPI Assessment Director; GEMS- Montana's Statewide Longitudinal Education Data System; Assessment statistician, and Project Manager | Use local or Smarter Balanced battery of assessments, to design a re-entry plan for assessment for the schools.  This would provide them with the urgent information they need regarding student learning and is also aligned to best practices for assessment in this unusual school year.

Allows educators to monitor student growth to create a holistic approach to each student's education.

Pursuing creative solutions to think about measuring growth, is more effective at the local level.  Currently, measuring student learning is  dependent on students taking tests. These measures will be impacted regardless of testing as the learning was impacted and we are not measuring the same thing.
Due to the suspension of Spring 2020 testing, schools will not receive |

| | |
|---|---|
| Establish a method for evaluating the entrance and exit criteria for CSI/TSI/ATSI schools based on data obtained through the local or ICAs assessment or proxy data.

Apply for an addendum that includes one-year updates related to long-term goals, indicators, school identification methodologies and timelines. | accountability ratings for the 2019–20 school year, which was year three of data collection by which CSI schools would need to meet exit criteria.

The growth indicator will be missing because data from the prior year is needed to measure growth.

We anticipate a streamlined addendum process for updates to ESSA consolidated state plans to be released by the USED in summer 2020.  As a result of the current federal waivers for assessment and accountability, USED is considering how to address requirements for indicators that rely on lagging or use multiple year of data and if a school is permitted to exit in the 2021 school year.

**NOTE:** OPI has explored the option of pursuing the USED's Innovation Assessment Demonstration Authority (IADA) through consultation with its Technical Advisory Committee (TAC) on May 28th and has been dissuaded from pursuing IADA under this grant round since applications close on June 30, 2020. The TAC has encouraged the OPI to stay the course to focus on maintaining the existing services for schools and in the future, may considering innovative options under IADA after time to develop a more comprehensive plan of measuring competency under a new system. |

| GROUP C, FLEX 3 | Draft and seek an amendment to the Montana Consolidated State Plan under ESSA for the accountability system that is used to meaningful determine improvement status. | |
|---|---|---|
| WHEN | Submit in late 2020 or early 2021 | |
| WHAT | RESOURCES | WHY |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Revise the accountability system fifth State Flex Indicator to eliminate attendance factors and address how school engagement will be measured. | OPI Senior Leadership; OPI ESSA Coordinator; OPI Assessment Director; GEMs; Assessment statistician, and Project Manager. | A one year pause to the accountability system would enable the system to be restarted—and provide a planning year to revamp and enhance the whole system, including the flexible fifth indicator which is heavily based on attendance.

The potential of remote learning combined with in-persona learning schedules at schools, could significantly impact chronic absenteeism rates and significantly reduce comparability. |

## Group D:  Fostering and Supporting Local Innovation

| GROUP D, FLEX 1 | Pursue an enhanced partnership with Montana Digital Academy to support remote learning. | |
|---|---|---|
| WHEN | Immediate start, ongoing partnership | |
| WHAT | RESOURCES | WHY |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Request that Montana Digital Academy extend periods of enrollment and remove deadlines. Request that Montana Digital Academy stretch down to 4th and 5th grade. Request that Montana Digital Academy consider providing a class by grade level for those schools that have a handful of students who need remote learning. Partner with Teacher Retirement System (TRS) to waive certain requirements so recently retired teachers could teach in MDA to help with the teacher shortage. Ensure schools suffer no funding shortage due to remote learning. | OPI Senior Leadership; SAM; BPE; and MDA Staff | Students will have more and broader opportunities to take classes that will help them close the expected COVID-19related learning gap, attain credits for graduation, or receive remote instruction. |

| GROUP D, FLEX 2 | Expand the Transformational Learning Bill for remote and blended learning models | |
|---|---|---|
| WHEN | July 1, 2021 for 2021-2022 School Year | |
| WHAT | RESOURCES | WHY |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| The grant process needs to be funded in a way to have more applicants. Self-directed philosophy is needed. | OPI Senior Leadership; SAM; BPE; and MDA staff | Students will have more and broader opportunities to take classes that will help them close the expected COVID-19related learning gap, attain credits for graduation, or receive remote instruction. |

| GROUP D, FLEX 3 | Support legislative considerations or a waiver process that empowers school districts to design their own Innovative paradigm/model that fits their community needs; bundles local, state, and federal flexibilities; and provides time for school communities to plan, implement and evaluate the new paradigm. | |
|---|---|---|
| WHEN | July 1, 2021 for 2021-2022 School Year | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Develop a Task Force to dig deeper into the Innovative paradigm/learning models.

Develop a legislative bill for 2023 session that empowers and incentivizes school districts to bundle local, state, and federal flexibilities; and provides time for school communities to plan, implement and evaluate a new model. Find a Legislator to carry the bill.

Develop Proficiency Model and Off-Site Learning Model Waivers. | OPI Senior Leadership, Designated OPI staff, MTSBA, and MT-PEC. | More school districts can efficiently and effectively move to transformational learning with a student focus/proficiency model.

School districts need to be encouraged and incentivized to question and rethink fundamental assumptions about education models. In particular, at the high school level, so that, graduating students are fully prepared to succeed after high school.

This supports the constitutional goal of developing the full educational potential of each individual. |

## Group E - Leveraging Federal Flexibilities and Resources

| GROUP E, FLEX 1 | Federal Funding Flexibility Waiver for Title I, Part A to address eligibility and carry-over. | |
|---|---|---|
| WHEN | September 1, 2020 – May, 2021 | |
| **WHAT** | **RESOURCES** | **WHY** |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Investigate the limits of the current waiver, and potentially request to waive any carry over limitations for 2019-2020 and 2020-2021.<br><br>Allow Title I schools in Targeted Assistance to function under the Title I Schoolwide requirements for 2020-2021.<br><br>Assess the feasibility and effects of lowering the free/reduced rate to qualify for Targeted Assistance for 20-21 school year and of obtaining increased Title I funding.<br><br>Review the Education Flexibility Program, which grants States authority to grant local waivers without USED approval. | OPI Senior Leadership, BPE, USED, OPI Federal Programs Manager, OPI ESSA Coordinator, and SAM | All schools get to determine where the dollars are most needed to ensure quality education. |

| GROUP E,  FLEX 2 | Federal Funding Flexibility Waiver for Nutrition | |
|---|---|---|
| WHEN | September 1, 2020 – May, 2021 | |
| WHAT | RESOURCES | WHY |
| Major tasks to be performed | Resources needed to accomplish the task | Use Case or Rationale |
| Moving into school year 2020-2021, School Nutrition Programs will pursue the following flexibilities:  1.      Apply for an extension of existing nation-wide U.S. Department of Agriculture (USDA) off-site monitoring waiver for school year 2020-2021 to align with agency travel restrictions.  2.      Use existing nation-wide USDA waivers for non-congregate feeding and mealtimes for the National School Lunch Program (NSLP) to allow for grab and go meals for remote students for school year 2020-2021.  3.      Use existing flexibilities regarding deadlines are already in place for the Community Eligibility Provision (CEP) through the nation-wide USDA waiver to determine eligibility for school year 2020-2021. School Nutrition will continue to communicate CEP eligibility requirements to LEAs, assist LEAs in maximizing Identified Student Percentages (ISP), and provide technical assistance to LEAs reaching the end of their 4-year eligibility cycle. | OPI School Nutrition; USDA; OPI Data Governance; Title IV-B, Perkins, Data and Technology, EGrants, OPI Student Support Services, Report Card, TEAMS, et al. | Provide meal program options for schools to ensure students have access to nutritious meals, whether they are attending classes onsite or virtually.  USDA extended nation-wide waivers for the National School Lunch Program for School Nutrition Programs until June 30, 2021. |

| | | |
|---|---|---|
| Intra-agency collaboration to determine programs or services that are impacted by a school's free/reduced rate.<br><br>Create informational document for schools to share with households to encourage completing free/reduced applications. School Nutrition Programs will continue to promote currently available resources.<br><br>Encourage LEAs and offer resources on how to leverage Elementary and Secondary School Emergency Relief (ESSER) funding to build staff capacity, nutritional program development and training on reimbursement systems | | |

## Summary

This "Montana Flex2020 Task Force Report" summarizes the Montana Flex2020 Task Force recommendations to Superintendent Elsie Arntzen and this work documents all activities of the meetings, member conversations, ideas, and the proposed next steps for the OPI in order to support Montana's public-school districts.

Presentation to the Montana Board of Public Education (Board) on July 15-17 meeting will summarize Superintendent Elsie Arntzen's recommendation to the members of the Board to proceed with the necessary actions in order to implement (or realize) some or any of the Task Force's recommendations contained within this report. As previously disclaimed, this document is not an exhaustive list of actions that the OPI will consider on behalf of Montana's public schools and any flexibilities within the laws or regulations are subject to the processes required under federal amendment, legislative, and rulemaking before any legal or regulatory actions may be taken at which point all standard public notice and comment requirements would be observed.

## Glossary

**A**

- Additional Targeted Support and Improvement (ATSI)
- Administrative Rules of Montana (ARM)

**B**

- Board of Public Education (BPE)

**C**

- Certification Standards and Practices Advisory Council (CSPAC)
- Community Eligibility Provision (CEP)
- Comprehensive Support and Improvement (CSI)
- COVID-19-Novel Coronavirus

**D**

**E**

- Elementary and Secondary Education Act (ESEA) of 1965
- Elementary and Secondary School Emergency Relief (ESSER)
- Every Student Succeeds Act (ESSA)

**F**

**G**

- GEMS- Montana's Statewide Longitudinal Education Data System

**H**

**I**

- Identified Student Percentages (ISP)
- Innovation Assessment Demonstration Authority (IADA)
- Interim Assessment Blocks (IBAs)
- Interim Comprehensive Assessments (ICAs)

**J**

**K**

**L**

- Local Education Agencies (LEAs)

**M**

- Montana Annotated Code (MCA)
- Montana Association of School Superintendents (MASS)
- Montana Digital Academy (MDA)
- Montana Federation of Public Employees (MFPE)
- Montana Public Education Center (MT-PEC)
- Montana School Boards Association (MTSBA)
- Montana Small School Alliance (MSSA)
- Montana Quality Education Coalition (MQEC)
- Montana Rural Education Association (MREA)

**N**

- National Assessment of Educational Progress (NAEP)

- National School Lunch Program (NSLP)

**O**
- Office of Public Instruction (OPI)

**P**

**Q**

**R**

**S**
- School Administrators of Montana (SAM)

**T**
- Targeted Support and Improvement (TSI)
- Teacher Retirement System (TRS)
- Technical Advisory Committee (TAC)
- Terms of Employment, Accreditation, and Master Schedule (TEAMS) report

**U**
- U.S. Department of Agriculture (USDA)
- U.S. Department of Education (USED)

**V**

**W**

**X**

**Y**

**Z**