

Montana Office of Public Instruction Adult Education

Adult Education and Family Literacy Act (AEFLA)
Workforce Innovation and Opportunity Act (WIOA)

Assessment Standards and Guidelines
2024 - 2025



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Part I – Introduction and Montana Context

Adult Education and Family Literacy Act (AEFLA) accountability is defined through the National Reporting System (NRS), which was established to meet the requirements of Title II of the Workforce Innovation and Opportunity Act (WIOA). The WIOA authorizes the state grant program to deliver adult education and family literacy instruction, with the purpose of providing educational or workforce advancement opportunities for all enrolled clients. The state sets performance standards to meet specific learner outcomes and uses data results to determine a portion of local program funding.

As a necessity for ensuring program compliance, statewide accountability and accuracy for federal and state reporting, funded AEFLA programs are required to follow the state Assessment Standards and Guidelines, contained herein. The Montana Office of Public Instruction (OPI) AEFLA staff will review the data periodically to determine needs for technical assistance in adhering to the state Assessment Standards and Guidelines.

For LACES (Literacy, Adult and Community Education System) data to be meaningful on a statewide and national basis, data collection procedures must be standardized among all programs in the state; that is, data must meet the definition of validity and reliability, and data must be defined and collected in the same way by all programs, for comparability across state AEFLA programs. The local programs are central to data collection efforts.

- Local program effectiveness is judged, in part, by whether these standards are met.
- Local programs are held accountable for helping clients determine appropriate educational and/or workforce advancement goals.
- Local programs are held accountable for helping clients attain their goals.

Note: Once yearly data is finalized, local programs may not make any changes. The OPI AEFLA staff will notify all local programs when data changes must cease.

Part II – Procedures

Section A – Purpose and Overview

The Montana Adult Education State Director will work closely with all programs to ensure WIOA standards and guidelines are followed by guaranteeing a quality system through procedure and program monitoring. Program leadership staff will assist in checks-and-balance compliance, provide ongoing professional development and training, and will establish a dependable data process for accurate collection and reporting outcomes.

Adult education programs will ensure all staff have a clear understanding of WIOA standards and procedures and that all state and federal guidelines are adhered to in all areas. Programs will use the following definitions from the WIOA law to determine client eligibility for providing AEFLA services.

The term adult education means academic instruction and education services, below the postsecondary level, that increase an individual's ability to –

- a. *read, write, and speak in English and perform mathematics or other activities necessary for the attainment of a secondary school diploma or its recognized equivalent;*
- b. *transition to postsecondary education and training; and*
- c. *obtain employment.*

The term eligible individual means an individual –

- a. *who has attained 16 years of age;*
- b. *who is not enrolled or required to be enrolled in secondary school under state law; and*
- c. *who –*
 - i. *is basic skills deficient;*
 - ii. *does not have a secondary school diploma or its recognized equivalent, and has not achieved an equivalent level of education; or*
 - iii. *is an English language learner.*

All AEFLA Programs will:

- Use the WIOA Adult Education Enrollment Intake Form provided by the OPI to collect the information necessary for enrollment. Client demographics, locator scores, pretest scores, and posttest scores shall be entered in the statewide AEFLA database (LACES). Programs may collect additional information as necessary or required. The purpose of the state approved WIOA Adult Education Enrollment Intake Form is to ensure the consistent collection of client information.
- Designate and train staff to administer the WIOA Adult Education Enrollment Intake Form and state approved Consent to Release Personal Information Form according to the standards stated in this document. (No other alterations are to be made to the state approved forms. If programs want to add to the standard state approved intake form, their version must be submitted to the state for approval.)
 - Staff will record a client's Social Security Number (SSN) upon intake and enrollment and enter it into LACES with all other demographic information. The purpose of collecting the SSN is to assist the OPI in obtaining and reporting information for grant funding concerning the outcome of clients as required by Section 212 of the Adult Education and Family Literacy Act. The SSN is used for data matching purposes only.
 - If a client is unable to provide a valid SSN, program staff will contact state staff, and a faux SSN will be provided for them.
 - Every program that has clients with faux SSNs will contact each person who was issued a faux SSN in order to collect a valid SSN before the end of the FY.
 - Co-enrollment in other WIOA Core Programs will be recorded in LACES, if applicable.
 - Title I Adult
 - Title I Dislocated Worker
 - Title I Youth
 - Title III Wagner-Peyser

- Title IV Vocational Rehabilitation
 - General referrals will be entered in the Student Tab – Services – Referrals Section.
- Ensure staff has an understanding of the state Assessment Standards and Guidelines and adhere to the policies contained herein.
- Follow protocol for serving high school age clients.
 - Notify appropriate staff in the school district(s) served by each program of the need for a documented procedure for AE programs serving high school aged clients.
 - Collect high school withdrawal letters for clients between the ages of 16-18 as part of the enrollment process.
 - If an in-state client, age 16-18, requests enrollment without verification of withdrawal, explain to the client that services cannot extend beyond five business days without written letter of verification of withdrawal from the school district. If the client last attended high school out-of-state, the services may extend for up to 30 calendar days.
 - If documentation is not received within five business days (30 for out-of-state), discontinue instructional services until withdrawal documentation is received.
 - Delivery of the letter/verification of withdrawal shall follow the agreed protocol of the school district and the local AE program: hand delivery by the client, email, fax, etc.
 - All verifications of withdrawal must be on school letterhead.
 - If a withdrawal letter cannot be obtained, request a letter from the county superintendent of schools or contact the state director for other options.
 - Upload the withdrawal letter/verification under the Student Tab – Documents in LACES.
 - The above steps are the minimum requirements. Individual programs may require written documentation prior to providing any instruction.
 - The adult education participant may sign the Consent to Share School Withdrawal Documentation so that only one withdrawal letter is needed for both the High School Equivalency (HSE) minimum age overrides, as well as obtaining WIOA adult education services. This document may also be used for transferring services between two WIOA adult education programs. The original letter should be photocopied and sent with the Consent to Share School Withdrawal Documentation to the HSE Test Center or to whichever WIOA adult education program the client is transferring.
- Administer assessment tests according to the standards stated herein and as recommended by the test developer.
- Administer one of the authorized assessment instruments to establish the Subject Area (formerly Primary Area of Instruction) and Educational Functioning Level (EFL).
- Pretest clients within 12 hours of instructional activity each program year unless criteria have been met for carryover. (See Section D – New Program Year for information on carry-over requirements).
- Assist clients in educational advancement and goal attainment specific to their needs and academic capabilities.

- Designate staff to enter the collected information into the statewide AEFLA database (LACES) with a verified process for accuracy. The state director must be given all data entry staff contact information and notified of any staff changes.
- Securely file the WIOA Adult Education Enrollment Intake Form with assessment results in a hard copy permanent file. Beginning fiscal year 2022, programs shall keep files for five years beyond the current year.
- Posttest eligible clients in an effort to demonstrate improvement in educational functioning level (EFL).
- Program directors are required to verify that correct testing procedures are being followed. Client files will be reviewed during desktop, virtual, and/or onsite monitoring for quality assurance.
- All staff working in the WIOA Title II program should be entered into LACES, so the State has an accurate representation of NRS Table 7.
- Complete state professional development (PD) requirements.
 - All staff working in the WIOA Title II program and being paid out of federal, state, and/or local education funds (full time or part time staff-excluding volunteers) should have documentation of PD loaded into LACES.
 - Upload documentation under the Staff Tab – Documents – in LACES by June 30 each year.
 - Documentation should show that the staff member attended PD during the FY.
 - Documentation should indicate the number of hours of PD.
 - New PD is required each FY.
 - Hours Required
 - Full time staff: complete four hours of professional development of choice, in addition to the state-sponsored meetings/trainings.
 - Part time staff: complete two hours of professional development of choice, in addition to the state-sponsored meetings/trainings.
 - The activities must be:
 - a planned and structured experience,
 - of benefit to the staff member's professional development,
 - an exposure to a new idea or skill or an extension of an existing idea or skill, and
 - consistent with adult education goals and client outcomes.
- Programs are responsible for providing an annual review of the *Montana Adult Education and Family Literacy Program Assessment Standards and Guidelines* with all staff and documenting the training in the Staff Professional Development Tab in LACES. Note, this is in addition to the required professional development of choice and the state-sponsored meetings/trainings.
- Designate instruction at the 9th grade level as indicated below.
 - Outcomes on NRS Table 5 are important indicators of the state's performance. In order for clients to be placed on NRS Table 5 they must demonstrate skills at 9th grade level or above. With the administration of TABE 11/12, few clients attain placement in ABE levels 5 and 6 (9th-12th grade). However, many clients placed in lower ABE levels are successful on the HSE.

- In order to capture the clients who are demonstrating 9th grade level high school skills, all programs will create a class in LACES called HSE Final Prep, enabling the checkbox for 9th grade level and above each fiscal year. Clients will be enrolled in this class when they are prepared for and have taken at least one HSE subtest. Preparation shall be determined via classroom instruction and HSE practice tests.
- To obtain readiness, clients may also attend other classes designated 9th grade level and above. Those classes may be designated/titled differently by each AE program. Only clients who are highly likely to successfully complete the HSE by the end of the program year shall be enrolled in HSE Final Prep.

Section B – Attendance Records

AEFLA programs must record the hours of direct instruction or instructional activity received by each client. Instructional activity includes any program-sponsored activity designed to help adults improve their educational and employment outcomes, increase their self-sufficiency, and support the educational development of their children. Examples of WIOA approved activities include, but are not limited to, the following:

- Intake and follow-up
- Goal setting and advising
- Assessment (excluding HSE testing)
- Classroom instruction and tutoring
- Approved distance learning participation

All programs will enter client attendance records into the statewide AEFLA database (LACES) and abide by the following:

- Attendance will be entered and rounded using standard math guidelines (0-7 minutes = 0 minutes, 8-15 minutes = 15 minutes, etc.) to the nearest quarter hour.

Minutes Accrued	Equivalent Minutes Earned	LACES Hours Entered
0 to 7	0	0
8 to 22	15	.25
23 to 37	30	.5
38 to 52	45	.75
53 to 67	60	1
68 to 82	75	1.25
83 to 97	90	1.5
98 to 112	105	1.75

- Attendance will be entered for each client by class.
- Attendance entries will be for 10 or fewer hours per day.
- Attendance should be entered weekly, preferably daily.

- *If attendance is not entered daily, attendance dates entered into LACES shall match program attendance records.*
- Attendance should not be entered after 30 days.

Section C – Goal Setting

Goal setting is a process that occurs for each client during the span of enrollment in AEFLA programs. Quality goal setting is critical to client achievement. For each program year and period of participation (POP), program staff should use the following guidelines while setting/reviewing goals with all clients:

- Review/update information on the Client Intake Form.
- Discuss client reason(s) for enrolling in AEFLA program.
- Discuss potential barriers the client may have and identify other WIOA CORE or community program referrals and/or services that may be applicable.
- Review results of assessment tests and develop a learning plan to meet the needs of each client.
- Client goals may be recorded in the Outcomes Section of the Student Tab in LACES.

Short-term and long-term goals should be set based on the following Measurable Skill Gain (MSG) and performance measure outcomes:

- MSG 1 – Achievement of at least one education functioning level gain.
 - Pre/posttest.
 - Enrollment in postsecondary education (PSE) or other training program during the program year.
 - Pass a subtest on the HSE exam.
- MSG 2 – Achievement of a secondary school diploma or its recognized equivalency.
- MSG 3* – PSE transcript with sufficient credit hours.
 - 12 semester hours for full-time or 12 semesters across two consecutive semesters for part-time
- MSG 4* – Satisfactory or better progress report toward established milestones from employer or training provider.
 - On the job training, internship, increase pay/promotion, industry-specific certificate (ServSafe, OSHA, etc.), pre-apprenticeship, progress report from employer
- MSG 5* – Successful passage of an exam that is required for a particular occupation or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks, such as knowledge-based exams.
 - Attainment of an industry recognized credential, certification, or license, requiring passing of an exam for attainment
 - Successful completion of a class required for progression to taking a technical or occupational skills exam

*MSG Types 3, 4, and 5 are only applicable to clients participating in a state-approved Integrated Education and Training (IET) or Workplace Literacy (WPL) Programs. See Part VII – IET and WPL Program Policy for additional information.

Section D - Assessment Information

The OPI has authorized statewide use of the following assessment instruments:

- Test of Adult Basic Education (TABE) 11 & 12
- Test of Adult Basic Education (TABE) 13 & 14 – *anticipated Fall 2024*
- BEST English Speaking and Listening Skills (BEST Plus 2.0) for ELL – *allowable through June 30, 2025*
- BEST English Speaking and Listening Skills (BEST Plus 3.0) for ELL – *anticipated Fall 2024*
- BEST English Reading and Writing Skills (BEST Literacy) for ELL – *allowable through June 30, 2025*
- BEST English Reading and Writing Skills (BEST Literacy 2.0) for ELL
- CASAS GOALS 2 and STEPS – *limited/preapproved pilot programs usage through June 30, 2025*

The above assessments are approved by the U.S. Department of Education and NRS guidelines. To ensure accuracy and consistency, the Montana OPI requires all programs to use the selected standardized assessment instruments based upon measuring what is intended to be measured (validity) and yielding consistent results (reliability).

All AEFLA programs will administer these assessments according to both test developer recommendations and state standards set forth in this document.

To meet the diverse needs of all clients, particularly as we strive for college and career readiness outcomes, programs are encouraged to use various formative and summative assessments to assist in the development of their program instruction and activities. However, for reporting purposes and meeting NRS requirements, only approved test instruments are allowed. No other forms of assessment shall be used for the purpose of pre and posttesting to report NRS educational gains.

All programs will enter client attendance records into the statewide AEFLA database (LACES) and abide by the following:

Pretesting

- Pretests must be administered for all clients (100%) within the first 12 hours of participation using the most appropriate authorized assessment. If the TABE is used, clients must be assessed in reading and one other academic area (mathematics or language). All AEFLA programs will measure client gains from this baseline.
- In instances, where a client is receiving instruction in *only* one subject area for HSE preparation or *only* participating in an Integrated Education and Training/Workplace Literacy program, *the pretest given should reflect the most relevant academic area.*
- Record reason and explanation for pretest in only one subject area under the Comment Type “One Pretest Only.”
- Pretesting results shall be utilized during the goal setting process.
- All clients shall be entered into LACES upon completion of the intake form.
- A period of participation (POP) begins when a client has entered the program and completed 12 or more instructional hours. The POP ends when the client exits, as demonstrated by not having

completed additional instructional activity within 90 days. It is considered a new enrollment if the client returns in the current program year, after a gap of 90 days. At that time, a new POP begins. The most recent scores will be considered.

- To accommodate various intake/orientation and testing scenarios, and for reporting consistency across all programs, the allotted hour designations to be used are as follows:
 - [TABE Assessment](#):
 - 2.25 hours for Reading
 - 1.25 hours for Language
 - 1.50 hours for Math
 - [CASAS GOALS for ABE](#):
 - 1.25 hours for Reading
 - 2.0 hours for Math
 - [CASAS STEPS for ELL](#):
 - 1.75 hours for Reading
 - 1.50 hours for Listening
 - [BEST Plus/BEST Literacy](#): 1 hour
 - Intake/Orientation: 2 hours
 - Advisement: 1 hour

Note: For PY 2024-2025, the Billings, Missoula, Great Falls, and Kalispell Adult Education Programs will pilot the use of CASAS GOALS and STEPS assessments along with BEST assessments. Since BEST Plus 2.0 expires June 30, 2025, the state will determine if all programs must transition to BEST Plus 3.0 or CASAS STEPS for the following year.

Transfer and Co-Enrolled Clients

If a client transfers to a different program or enrolls in more than one program, the Cross Agency Tracking feature in LACES will duplicate client data at intake from the originating program.

- For more information on Cross Agency Tracking visit the [LACES Website](#).
- TABE and BEST assessments are copied to the new student account only if the tests were administered in the same FY.
 - Contact the state office to manually import TABE/BEST assessments from the previous FY. *Note – only valid assessments taken at other WIOA Education Programs will be considered.*
- HSE records are copied to the new student account regardless of the assessment date.
- Each program will add Comment Type “Transfer Student/Co-Enrolled” with details of where/how the client is being served.

Programs will communicate attendance for purposes of determining posttest hours and assessment information monthly.

- Programs will not manually enter any attendance hours in LACES earned at other programs but may use the attendance hours provided to determine posttest eligibility.
- Programs will request that the state upload the subsequent TABE assessments to the respective site as they are not automatically imported after the initial data transfer.
- Programs will share the score report/score sheet for BEST assessments, upload them in the Student Document Section under “Transfer Student/Co-Enrolled Documentation”, and manually enter them in the Assessment Tab.
- Programs will select the Comment Type “Posttest Exception” in LACES and provide details if another program’s attendance hours have been used to determine posttest eligibility.

Pre-Assessments and Intake/Orientation Hours

- Assessment dates must always reflect the actual date the assessment was administered.
- Intake/Orientation hours should be entered into LACES. *Hours given prior to pre-assessment will populate in LACES, however, they will not count toward posttest hours.*

Posttesting

The length of time between pre and posttests must be long enough to allow the client to make progress and shall align with the test publisher’s guidelines. (See Part III TABE Assessment and Part IV ELL Assessment for specific time requirements for pre and posttesting.)

Measurable skills gains (MSG) can be made in any subject area when an EFL gain is achieved through pre and posttesting. Scaled scores from a posttest will be compared to the scaled scores of the pretest in the same subject area to determine if an MSG was achieved through an EFL gain.

AEFLA programs must strive to achieve or exceed the state’s posttest standard of 60%.

Posttest Hours

- Assessment dates must always reflect the actual date the assessment was administered.
- Posttest eligibility hours are determined "between" assessments. If a client takes a posttest on the same day that the client’s eligible hours are reached, that client’s posttest *will not count* because LACES will not see the hours as "between" assessments.

Pre/Posttesting and Periods of Participation (POPs)

Clients are automatically exited when 90 days have lapsed with no participation. If a client returns during the same program year after being exited, a new POP begins. Pre and posttesting as related to POPs is as follows:

- When POP2 is established, the most recent test taken in each subject area in the prior POP will

be designated as the pretests in the new POP. Programs will also select the subject area using the criteria established in General Assessment Information.

- If the client has an MSG in POP1, that client will be eligible to posttest to determine an MSG in POP2 after accumulating 12 or more hours of instruction in POP2.
- If the client did not have an MSG in POP1, that client will be eligible to posttest after accumulating the minimum number of hours required for an initial posttest.
- If the client has an EFL gain because of the posttest in POP2, the MSG will count for POP1 if the client did not have an MSG in POP1. This test in POP2 serves as the pretest for POP2 and as a posttest for POP1.
- An EFL gain in POP2 will require another test after the client receives sufficient instructional hours for a posttest following TABE assessment guidelines.
- ELL clients who posttest in the BEST Plus assessment, place at the ELL exit (level 6), and establish a subsequent POP, will be administered the BEST Literacy assessment if BEST Literacy was not previously administered. The BEST Literacy assessment will be used to determine an MSG in POP2.
- ELL clients who posttest in the BEST Literacy assessment, place at the ELL exit (level 6), and establish a subsequent POP, will take the TABE as the pretest in the subsequent POP.

New Program Year

All clients, except carry-over clients, must take a new locator and pretest to establish an EFL and subject area for the new program year.

Clients who were served in the previous program year may have their assessments pushed forward to the new program year. TABE, BEST Plus, or BEST Literacy assessments from the previous program year may be pushed forward and used in the new program year.

- ELL clients who achieve ELL exit (level 6) on the BEST Plus assessment in the previous program year need to be tested using the BEST Literacy assessment if BEST Literacy was not previously administered.
- ELL clients who achieve ELL exit (level 6) on both the BEST Plus 2.0 and BEST Literacy assessment in the previous program year need to be tested using the TABE assessment.
- Only one assessment per subject area may be pushed forward.
- If a client has two assessments in the same subject area within the move forward window, only the one generating the highest assessed level should be moved forward.
- Assessments that are pushed forward may not be older than the last program year.
- Assessments may be pushed forward any time after the start of the new program year (July 1).
- The client intake form needs to be updated at the beginning of the program year if there is a lapse in service of greater than 90 days.

If there is no exit across program years, the POP will continue into the next program year (a continuous

POP) provided the client receives an EFL in LACES in the new program year. In this case, the most recent assessment with the highest assessed level (scale score) in each subject area may be moved forward.

Part III – TABE Assessment

Section A – TABE Purpose and Overview

The TABE assessment will be administered consistently throughout Montana AEFLA programs to manage and monitor client educational gains and to identify areas needing program improvement.

The TABE measures skill levels in reading, mathematics, and language. There are five overlapping levels for TABE 11 and 12 as indicated in the chart.

TEST LEVEL	GRADE RANGE
L-Literacy	0-1.9
E-Easy	2.0-3.9
M-Medium	4.0-5.9
D-Difficult	6.0-8.9
A-Advanced	9.0-12.9

TABE 11 and 12 Instruments:

- The TABE Locator Test: is administered to determine the appropriate level of the TABE to administer to the client.
- TABE Level L (Literacy): is used when a client has difficulty reading while taking the TABE Locator Test. It assesses clients in reading, mathematics, and language and is administered 1:1 with the client using instructions found in the TABE Form 11 and TABE Form 12 test directions.
- TABE 11/12 is a comprehensive set of questions used to assess reading, mathematics, and language skills.

Section B – TABE Administration and Training

All TABE Administration guidelines must be followed to obtain valid and reliable results. Programs can administer assessments in computer or paper/pencil format. TABE assessments may be administered virtually with a proctor following TABE Assessment guidelines.

[http://tabetest.com/PDFs/TABE AND TABE CLASE REMOTE PROCTORING.pdf](http://tabetest.com/PDFs/TABE_AND_TABE_CLASE_REMOTE_PROCTORING.pdf)

To correctly use TABE Assessments, they must be timed. The timing for each part of the assessment is programmed into TABE online and can also be found in the TABE test directions for Forms 11 and 12.

TABE Locator: The locator will be used during the client intake process. It assesses reading, mathematics, and language to determine which level of the TABE clients will take at pretest. Varying TABE levels can be administered in each area.

TABE Forms and Levels: Programs are to use the TABE Test Levels L, E, M, D, or A to assess client skill levels upon entry as well as to measure the progress of clients in reading, math, and language throughout enrollment.

Clients must be assessed in reading and one other discipline area (mathematics or language). If a client receives a scaled score of 0 in any subject area, the test must be re-administered in the test level below the client's initial test.

TABE Out of Range Scores and Plus/Minus Indicators: Generally, when TABE 11/12 pre and posttests in LACES show as "0," they are "out of range." The client has performed more than one level below the targeted level. That client should be tested with a lower TABE assessment. This assessment does *not* need to be invalidated with DRC or deleted in LACES.

If a client has received a score of "0" in LACES because that client started a test but did not answer any questions or did not finish the test, or if there were technical issues, cheating, etc., that score should be invalidated. The [TABE Best Practice Guidance](#) document (page 11) covers invalidating a TABE test.

When a test score shows a "+" or "-" adjacent to the scaled score in LACES, this means the *program may want to reassess* the client. Please reference the [TABE 11 and 12 Scoring Levels: Best Practice Guidance](#) for more information.

When a student is reassessed due to "+" or "-" indicator on the DRC score report, it will appear in LACES that the student was posttested early. To ensure an assessment does not appear as an early posttest due to a "+" or "-" indicator, programs will:

- Upload the DRC score report to LACES in the Student Data Tab – Documents Section.
- Contact DRC to invalidate the assessment and notify the state that the assessment has been successfully invalidated.
- The program may reassess the client at an appropriate level.

The state office will delete the assessment with the +/- indicator in LACES and make note in the Student Data Tab – Comments Section.

Establishing Subject Area for Educational Functioning Level (EFL) Gains: Upon completion of pretesting and goal setting, the primary subject area will be selected and is determined based on lowest EFL. **LACES automatically chooses the lowest EFL/SPL from the first day of pretesting. In instances where programs test over two or more days or a client completes a test with a result of 0, it is the program's responsibility to change the subject area to the lowest EFL. This provides consistent practices for EFL/SPL designation and opportunities to achieve EFL/SPL gains at posttest.*

Test Manufacturer's Recommended Guidelines for Posttesting:

Levels 1-4 (ABE)

- The recommended number of instructional hours between a pre and posttest for Levels 1-4 (ABE) is **50-60** hours of instruction, with a **minimum of 40 hours**.

Levels 5 (ASE Low)

- The recommended number of instructional hours between a pre and posttest for Level 5 is **30-59** hours of instruction, with a **minimum of 30 hours**.

State Allowable Exceptions to the Test Manufacturer’s Recommended Guidelines for Posttesting:

There are valid reasons for occasional posttesting earlier than the guidelines recommend. These instances should be **rare and well-documented**. For example, a client leaving the program earlier than expected **AND** instructor evaluation determines the client is ready for a posttest. Therefore, while the test manufacturer guidelines recommend a minimum of 40 instructional hours between tests for TABE Levels 1-4, and a minimum of 30 instructional hours for TABE Level 5, programs may submit an [Early Posttest Application Form](#) for state review/consideration if:

- The learner is leaving the program for personal reasons **AND** evidence indicates likelihood of a gain with early post testing.
 - The learner must have a minimum of 30 instructional hours.
 - The program will upload the Early Posttest Application Form to the Student Data Tab – Documents Section in LACES and notify the OPI AEFLA staff by email.
 - The OPI AEFLA staff will enter a Comment Type “Posttest Exception” in LACES with details of approval/denial and respond by email.

Measuring client progress: Clients who need to be posttested more than once in a program year to demonstrate a gain may not use the same TABE Form and Level within any six-month period. Programs will use the alternate form of the TABE that was administered at the time of the pretest. (e.g., Form 11, Level M at pretest; Form 12, Level M at posttest).

Based on instructor input and/or a pretest scale score near the top of a Level, AEFLA programs may administer a posttest in a level higher than the pretest (e.g., client tests near the end of range at Level M and has good progress in classroom, posttest with Level D). A client should be scoring at the top of the scale score range on the lower level, if a higher-level test will be administered.

https://tabetest.com/PDFs/TABE_11_12_Scoring_Best_Practice_Guidelines.pdf

Following TABE administration guidelines, programs may posttest in any subject area to achieve an EFL gain, to assess interim progress, or utilize for teacher evaluation. If a client does not achieve an EFL gain when posttested in one subject, programs are encouraged to prepare and posttest the client in another subject area to show an EFL gain.

TABE Retesting: Retesting refers to the administration of a subject area more than once in a program year to measure an EFL gain. The Guide to Administering the TABE recommends a minimum of six months between administering the same level and form of the test to avoid the "practice effect" in which a client scores artificially high because of familiarity with the test items. To avoid the “practice effect” AEFLA programs may administer the same Form of the TABE more than once every six (6) months if they move to a more difficult Level of the test.

TABE Results: TABE results will automatically upload into the statewide database (LACES) within 30 days of administration. The level, form and scaled score for each subtest administered must be reflected.

Deleting Client Records: Deletion of records is allowed, but the state will be monitoring this. Programs will select the Comment Type “Deleted Client Record” under the Student Data Tab in LACES to describe what data was deleted and why the deletion was made.

Manually Entering Assessment Scores: Do not manually enter assessment scores. TABE and HSE scores should automatically import to LACES.

Check to make sure that the following areas match completely:

- First Name
- Last Name
- Date of Birth: required format is MM/DD/YY
- Gender: must be “M” or “F” only. TABE Supports “O”, but this value is not recognized in LACES. Make sure the gender of “M” or “F” is used in TABE.

Contact the OPI AE Program Specialist if all areas match, and the score does not populate by the next business day. Supply date tested/submitted, and client ID #.

TABE® Form 11 & 12 – Normed Scale Scores for NRS – Educational Functioning Levels

Educational Functioning Level	Grade Equivalent	Reading Scale Scores	Total Math Scale Scores	Language Scale Scores
ABE Level 1	0-1.9	300-441	300-448	300-457
ABE Level 2	2.0-3.9	442-500	449-495	458-510
ABE Level 3	4.0-5.9	501-535	496-536	511-546
ABE Level 4	6.0-8.9	536-575	537-595	547-583
ABE Level 5	9.0-10.9	576-616	596-656	584-630
ABE Level 6	11-12.9	617-800	657-800	631-800

Prior to administering the TABE, staff must attend an in-person training which is periodically offered by the state or utilize the online training to become certified to administer the TABE. Certification must be loaded into the Staff Data Tab – Documents Section under “Staff TABE Certification.” Training must be completed before administering the TABE, and programs may have staff complete refresher training as needed. Those who attend in-person training may be designated as a program assessment trainer and may provide training assistance for new staff.

Part IV – ELL Assessment

Section A – BEST Plus 2.0 Purpose and Overview

The Basic English Skills Test (BEST Plus 2.0) measures the progress of adult learners enrolled in AEFLA programs as learners of English as a second language.

BEST Plus 2.0 is a performance-based, individually administered, face-to-face scripted oral interview.

BEST Plus 2.0 has both print-based and computer-adapted versions. BEST Plus 2.0 measures the speaking and listening skills of adult English language learners communicating about life skills in content areas such as health, work, family, and recreation.

BEST Plus 2.0 provides standardized assessment for placement decisions and instructional planning. A client's proficiency levels will be based upon the National Reporting System (NRS) Student Learner Performance Levels (SPLs). While the BEST Plus 2.0 is aligned with the NRS and SPL levels, their scores are not aligned with any other set of proficiency level descriptors or other assessments. BEST Plus 2.0 provides supporting evidence, through pretesting and posttesting, which measures both progress of the English language learner (ELL) and the effectiveness of the instructional program.

BEST Plus 2.0 testing materials may be purchased with AEFLA funds after a program has trained test administrators. The print-based version requires the use of BEST Plus 2.0 software for scoring and client reporting purposes.

Section B – BEST Plus 2.0 Administration & Training

BEST Plus 2.0 should be administered in the following ways:

- With adult non-native speakers of English in the United States.
- In educational settings and individually administered by trained staff only.
 - Remote test administration of BEST Plus 2.0 may be utilized if programs are providing virtual adult education services. Programs and clients must use video technology in order to most closely reflect face-to-face conditions.
 - Follow the [Best Plus 2.0 Virtual Test Administration Guidance](#).
- Test administrators should allow at least 20 minutes for each oral interview – testing can take longer depending upon response time.
- Posttesting may occur after the client has completed a minimum of 60 hours. While the test manufacturer guidelines recommend a minimum of 60 instructional hours between tests, programs may submit an [Early Posttest Application Form](#) for state review/consideration if:
 - The learner is leaving the program for personal reasons **AND** evidence indicates likelihood of a gain with early post testing.
 - The learner must have a minimum of 30 instructional hours.
 - The program will upload the Early Posttest Application Form to the Student Data Tab – Documents Section in LACES and notify the OPI AEFLA staff by email.
 - The OPI AEFLA staff will enter a Comment Type “Posttest Exception” in LACES with details of approval/denial and respond by email.
- For information on pre and posttesting and POPs, see Part II - Section D.
- Training to become a BEST Plus 2.0 test administrator will be provided by the state and only individuals who have been certified by the Center for Applied Linguistics (CAL) are authorized to train individuals to become BEST Plus 2.0 test administrators. This training will also include an overview of NRS policies, accountability policies, data collection procedures, and guidelines for

test administration. All potential test administrators will be required to attend a six-hour workshop conducted by a certified BEST Plus 2.0 trainer and will be approved by that trainer to begin administering the BEST Plus 2.0. At the end of the training workshop, each newly approved test administrator will sign an agreement to follow all BEST Plus 2.0 administration and scoring procedures exactly as explained in the BEST Plus 2.0 Test Administrator Guide.

- Prior to administering the BEST Plus Assessment, staff must have attended an in-person training which is periodically offered by the state. Certification must be loaded into the Staff Data Tab – Documents Section under “Staff BEST Plus Certification”. Training must be completed before administering the BEST Plus, and programs may have staff complete refresher training as needed.
- Test administrators are encouraged to demonstrate their scoring accuracy by attending a refresher workshop, engaging in self-study, and completing a scoring activity from the BEST Plus 2.0 Scoring Refresher Toolkit.
- Instructors should not administer or score their own client’s tests but should be allowed to observe the administration of the test of their own clients for the purpose of instructional feedback and improvement. Only trained instructors with experience in the ELL field should administer the BEST Literacy.
- Assessments will be recorded in the statewide database (LACES) and scores have been aligned to the NRS and EFL levels.

BEST Plus 2.0 – Normed Scale Scores for NRS – Educational Functioning Levels

Educational Functioning Level	NRS Score Range
Beginning ELL Literacy	88 to 361
Low Beginning ELL	362 to 427
High Beginning ELL	428 to 452
Low Intermediate ELL	453 to 484
High Intermediate ELL	485 to 524
Advanced ELL	525 to 564
Exit Criteria	565 and higher

Note: If a non-native speaking client is assessed at or above the exit criteria using a BEST instrument, the client may be assessed with *BEST Literacy* as an option, however, not as requirement.

Section C – BEST Literacy Purpose and Overview

The BEST Literacy assessment will measure adult English language learners’ functional reading and writing skills in English.

BEST Literacy is a paper-and-pencil test that can be administered either individually or in groups. Test administration takes one hour or less, and while training is not required by CAL, when state training for the BEST Plus 2.0 occurs, the BEST Literacy assessment overview will be included. To ensure the

accurate use and scoring of the BEST Literacy as a standardized assessment, all test administrators should read and follow the instructions in the BEST Literacy Test Manual.

In most instances, the BEST Plus 2.0 will be the initial placement assessment for ELL unless the ELL instructor determines from the intake interview that it would be beneficial to utilize BEST Literacy as well. Programs may administer the BEST Literacy along with BEST Plus 2.0 or to assess clients who have scored in NRS exit range (level 6) on the BEST Plus 2.0.

The BEST Literacy provides standardized assessment for placement decisions and instructional planning. Clients' proficiency levels will be based upon the National Reporting System (NRS) Educational Functioning Levels or the Client Learner Performance Levels (SPLs). While the BEST Literacy is aligned with the NRS and SPL levels, their scores are not aligned with any other set of proficiency level descriptors or other assessments. The BEST Literacy will provide supporting evidence, through pretesting and posttesting, which will measure both progress of the English language learner and the effectiveness of the instructional program.

Section D – BEST Literacy Administration & Training

BEST Literacy should be administered in the following ways:

- With adult non-native speakers of English in the United States.
- In educational settings and administered either individually or as a group by trained staff only.
- Test administrators should allow up to one hour.
- While the test manufacturer guidelines recommend a minimum of 60 instructional hours between tests, programs may submit an [Early Posttest Application Form](#) for state review/consideration if:
 - The learner is leaving the program for personal reasons **AND** evidence indicates likelihood of a gain with early post testing.
 - The learner must have a minimum of 30 instructional hours.
 - The program will upload the Early Posttest Application Form to the Student Data Tab – Documents Section in LACES and notify the OPI AEFLA staff by email.
 - The OPI AEFLA staff will enter a Comment Type “Posttest Exception” in LACES with details of approval/denial and respond by email.
- ELL clients who achieve ELL exit (level 6) on both the BEST Plus 2.0 and BEST Literacy assessment in the previous program year need to be tested using the TABE assessment.
- See pages 6-7 for testing requirements, validity, and carryover related to POPs.
- The BEST Literacy assessment will be administered and scored following CAL guidelines from the BEST Literacy Test Manual.
- Assessments will be recorded in the statewide database (LACES) within 30 days of administration. Scores are aligned to the NRS and EFL levels.

BEST Literacy – Normed Scale Scores for NRS – Educational Functioning Levels

Educational Functioning Level	NRS Score Range	Client Learner Performance level
Beginning ELL Literacy	0 to 20	0-1
Low Beginning ELL	21 to 52	2
High Beginning ELL	53 to 63	3
Low Intermediate ELL	64 to 67	4
High Intermediate ELL	68 to 75	5
Advanced ELL	76 to 78	6

Note: For PY 2024-2025, the Billings, Missoula, Great Falls, and Kalispell Adult Education Programs will pilot the use of CASAS GOALS and STEPS assessments along with BEST assessments. Since BEST Plus 2.0 expires June 30, 2025, the state will determine if all programs must transition to BEST Plus 3.0 or CASAS STEPS for the following year.

Part V – Use of Accommodations

AEFLA funded programs will provide reasonable accommodations, as required by ADA and other federal and state laws, for adults with disabilities. Program and test administrators may provide and allow an accommodation in test administration procedures or in the testing environment for individuals with disabilities, provided that the accommodation does not compromise the validity of the assessment instrument.

Clients requesting accommodations other than category 1 accommodations must provide verification of disability from an appropriate professional. When clients self-report the need for category 1 accommodations, programs must document and maintain a record of the accommodations provided.

[https://tabetest.com/PDFs/TABE Guidelines to Inclusive Testing 2017.pdf](https://tabetest.com/PDFs/TABE_Guidelines_to_Inclusive_Testing_2017.pdf)

An adult learner with a documented disability must provide the AEFLA program with disability-related documentation if that client requires accommodation(s). If a counselor or other program staff person determines through a screening that there is a strong possibility that the client has learning, or other disabilities, a formal assessment may be undertaken. A formal assessment of a learning disability must be administered by a licensed professional (e.g., psychologist, school psychologist, or psychiatrist) and is valid for five years from the date of the formal assessment. In some cases, a “licensed professional” may be a speech, vocational, physical, or occupational therapist with verification by a licensed medical doctor, psychiatrist, or psychologist.

Programs are responsible for maintaining accommodation records for each client in LACES under the Student Services Tab - Accommodations Section. Supporting documents can be uploaded under the Student Data Tab – Documents Section. This information will be used for desktop monitoring.

The state will monitor accommodation documentation through desk monitoring/and or onsite monitoring visits.

TABE: Accommodations for testing must adhere to the recommendations described by the test publisher for each test used in the state. Refer to Guide to Administering TABE.

BEST Plus 2.0: Test administrators cannot show the prompts on a screen or in the test booklet to a person with a hearing impairment nor can a sign language interpreter be used. A permissible accommodation for BEST Plus 2.0 would be the use of hearing aids. Likewise, test administrators cannot explain the content of a picture cue prompt to a person with a visual impairment. An appropriate accommodation would be the use of a magnifying glass to enlarge the image. BEST Plus 2.0 is not appropriate for use with individuals whose visual impairment prevents them from seeing the picture cue prompts even when enlarged or otherwise enhanced. Skipping picture questions is not a reasonable accommodation for individuals with visual impairments.

BEST Literacy Assessment: Test administrators cannot read the question to the examinee as BEST Literacy is a test of reading and writing, not listening. Permissible accommodations related to test administration procedures include the use of eyeglasses or magnifying glasses, earplugs, colored overlays, or rulers. Testing environment accommodations might include frequent breaks or individual administration.

Part VI – Client Follow-Up

Section A – Data Matching

Annually, the state will conduct a data match to track outcomes for the following:

- Employment second quarter after exit.
- Employment fourth quarter after exit.
- Median earnings second quarter after exit.
- Attained a secondary school diploma/recognized equivalent and enrolled in postsecondary education or training within one year of exit.
- Attained a secondary school diploma/recognized equivalent and employed within one year of exit.
- Attained a postsecondary credential while enrolled or within one year of exit.
- Clients who exit a program below the postsecondary level and enroll in postsecondary education and training during the program year. <https://nrsweb.org/policy-data/Resources-for-Reporting>.

At least once a program year, the state database (LACES) will be queried for lists of Social Security numbers and signed release forms to be used for data matching purposes.

All AEFLA clients who are data matched must have a signed release form on file that indicates they

agree to the use of their Social Security number for data matching purposes. The employment information from the Montana Department of Labor and Industry (DLI) is reported a year later than AEFLA data. The OPI will match employment and earnings annually.

For the goals of obtaining a high school equivalency (HSE) and postsecondary education, Social Security numbers will be matched with both the Montana HSE database and the Montana University System (MUS) database.

Data matching for HSE and postsecondary outcomes for the previous program year will be reflected on NRS Table 5. Data matching will occur for all clients who have signed waivers, have a separation date, and have met appropriate demographic indicators that are data matched. Only those clients with 12 hours or more will be included on the federal reports.

Section B – Survey

Surveys will be used for postsecondary education (PSE) or occupational skills training outcomes for clients who are outside of the above data matching qualifiers. Each program is responsible for contacting its clients who could not be matched with the Montana University System (MUS) enrollment data. This includes clients who are enrolled in a program below the postsecondary level and who enroll in postsecondary education or training during the program year.

Note – Training programs must lead to an industry-recognized credential and be needed to gain employment or advancement within an occupation.

Examples of activities that would not qualify:

- Work Readiness Training.
- Training that is not tied to a specific career pathway.
- Training or education that does not lead to entry or advancement in a specific field.
- Training or education that does not result in an industry-recognized credential.

Table 4 (current FY clients)

- [PSE/PSC Service Surveys](#) may be completed anytime during the fiscal year if clients enroll in PSE or training.
 - *Do NOT survey clients enrolled at a [MUS institution](#) – those will be captured via data match.*
- Upload surveys to the Documents Section in the Student Data Tab and complete the PSE or Training Section in the Education Tab.

Table 5 (previous clients – cohort to survey predetermined in LACES)

- Surveys are to be completed between January 1 – May 1 each fiscal year.
- Surveys are accessed in LACES via the All POPs Summary Area, Table 5.
- Programs must survey all participants who exited in the “Attained any credential” row.
- If adding a postsecondary or training record, programs must record:

- Postsecondary institution type.
- Name of postsecondary school or training program.
- Enrollment date.
- Exit date if applicable.
- Credential attained if applicable.
- Date earned of credential if applicable.

Part VII – Integrated Education and Training (IET) and Workplace Literacy (WPL) Policy

Section A – Introduction

This policy is intended to define Integrated Education and Training (IET) and Workplace Literacy (WPL) for all Montana AEFLA programs. The goal of this document is to provide guidelines by which programs can report client participation and/or performance outcomes in IET or WPL to the National Reporting System (NRS) using the state approved data management system (LACES).

Programs that wish to implement IET or WPL programs must adhere to federal and state guidelines. All IET and WPL programs must be planned in advance, with objectives and milestones identified, and approved by the Montana OPI AEFLA staff prior to implementing or claiming outcomes for WIOA Title II participants.

Information and technical assistance for local program IET and WPL implementation is available by contacting the state AEFLA office:

- Adult Education State Director/High School Equivalency State Administrator – (406) 465-1341
- Adult Education Program Specialist – (406) 594-3750

Office of Public Instruction
 PO Box 202501
 Helena, MT 50620-2501
 Fax: (406) 444-1373

Section B – Definitions and Requirements

Integrated Education and Training Defined

Integrated Education and Training (IET) is a service approach that provides adult education and literacy activities concurrently and contextually with workforce preparation activities and workforce training for a specific occupation or occupational cluster for the purpose of educational and career advancement.

All clients must accrue at least 12 hours of contact with an AEFLA program before they may be counted

for federal reporting purposes. If a client is participating in an IET program, concurrently and contextually, the IET Single Set of Learning Objectives (SSLO) template should be completed and approved by the state before the client is enrolled in an IET class. The IET SSLO will be reviewed each program year. Programs will upload the authorized IETP application form pre-approved by the state AEFLA office to the Student Data Tab – Documents Section under “IETP Approved Application Form.” Renewal of previously approved IET programs is not automatic.

The documentation demonstrating an IET MSG should be uploaded into LACES in the Student Data Tab – Documents Section and saved as “IET Documentation.” Some examples of IET documentation are College Transcripts (12 credit hours), Progress Report from Employer, Pay Increase, Apprenticeship, CNA/CDL License, etc. *Note: any documentation that will be used as supporting evidence of an MSG must be identified in the IET program proposal and approved by the state AEFLA office.*

If the IET MSG documentation is not uploaded into LACES by the end of the program year, the state will email the program director to complete this task. If documentation is not uploaded within two weeks, the state will edit the client record and change the enrollment status from “IET” to “No Value Entered.”

If the IET MSG documentation is insufficient, the state will request the program director complete this task. If the IET Documentation is not uploaded within two weeks after notification, the state will edit the client record and remove the IET MSG.

MSG Documentation for those enrolled in IET classes will be checked by the state at the end of the program year.

Workplace Literacy (WPL) Defined

Workplace Literacy (WPL) includes adult education and literacy activities offered by an eligible provider in collaboration with an employer or employee organization at a workplace or an off-site location designed to improve the productivity of the workforce (for participants currently employed with the employer/organization).

All clients must accrue at least 12 hours of contact with an AEFLA program before they may be counted for federal reporting purposes. If a client is participating in an WPL program, the WPL Planning Form should be completed and approved by the state before the client’s program type is changed to “Workplace Literacy” in LACES on the Student Data Tab and enrolled in a WPL class. Programs will upload the authorized WPL Planning Form pre-approved by the state AEFLA office to the Student Data Tab – Documents Section under “WPL Approved Planning Form.”

The documentation demonstrating an WPL MSG should be uploaded into LACES in the Student Data Tab – Documents Section and saved as “WPL Documentation.” Some examples of WPL Progress Report from Employer or Pay Increase. *Note: any documentation that will be used as supporting evidence of an MSG must be identified in the WPL planning form and approved by the state AEFLA office.*

If the WPL MSG Documentation is insufficient, the state will request the program director complete this task. If WPL Documentation is not uploaded within two weeks after notification, the state will edit the client record and remove the WPL MSG.

MSG Documentation for those enrolled in WPL classes will be checked by the state at the end of the program year.

Section C – Assessment and Reporting

AEFLA programs will assess IET and WPL participants utilizing the approved assessments and will follow all program and administrative guidelines contained herein.

Programs will count and record both direct adult education instruction hours and training hours into LACES. Instruction hours and training hours are recorded separately.

Under NRS reporting requirements, clients in IET programs will be reported in Table 11 (**Appendix A**). These tables demonstrate the program’s performance each fiscal year specific to IET participants and outcomes.

- **TABLE 11** reports educational gains and performance outcomes for IET participants. This table is similar to Table 5 – Primary Indicators of Performance.

Section D – Funding for IET and WPL

State Contribution

No additional funding will be provided. The reallocation of existing resources may be necessary. Programs that implement IET and WPL have the potential to increase their total clients served and MSGs to receive additional funding via the state-imposed performance-based funding formula.

Program Contribution

Programs that wish to implement IET and WPL must adhere to the Montana IET and WPL Assessment Policy and Protocol Guidelines. Programs may need to fund additional time and resources to implement IET and WPL offerings. Adjusting budgets accordingly during the first year of implementation is advised.

Part VIII- Distance Learning Policy

Section A – Introduction

This policy is intended to define distance learning delivery for all Montana AEFLA programs and provide standardization for programs that offer distance learning. The goal of this document is to provide guidelines by which programs can report adult clients' distance education hours to the National Reporting System (NRS) using the state approved data management system (LACES).

Montana began using distance learning in the 2007-2008 Program Year. In our increasingly technological world, distance learning has provided our state with another means to assist clients' successful achievement gains and increase our program outcomes. The vastness of Montana often prevents those most in need of literacy services from accessing AEFLA programs. Distance education provides a viable option for instruction and a way to recruit a large population of clients who previously may not have had access to AEFLA services. Distance education is a reality within all educational platforms, from K-12 systems to higher education institutes, and adult education programs.

By developing information and communication technology (ICT) within the classroom and through the various modes of distance learning, AEFLA programs are increasing educational access and providing options for adult learners. These options allow flexibility and offer a multitude of instructional strategies that will enhance educational gains, engage 21st century learning skills, promote workforce development, and improve the state's adult basic literacy outcomes.

All AEFLA Programs within the state of Montana can offer distance learning as a means of instruction. Distance learning provides clients the opportunity to engage in instruction at times when in-person instruction may not be the best option, and further provides clients in communities without local AEFLA programs, access to instruction.

Programs that wish to offer distance learning will have the opportunity to contact the state director, participate in all statewide required trainings, use state approved curricula, and manage distance learning according to state policy and NRS guidelines. Distance learning will be a supplemental delivery option, and AEFLA programs must be willing to incur increased costs as well as maintain in-person classroom instruction.

Information and technical assistance for local program distance learning implementation is available by contacting the state AEFLA office:

- Adult Education State Director/High School Equivalency State Administrator – (406) 465-1341
- Adult Education Program Specialist – (406) 594-3750

Office of Public Instruction
PO Box 202501
Helena, MT 50620-2501
Fax: (406) 444-1373

Section B – Definitions and Requirements

Distance Education Defined

The federal office of Career Technical and Adult Education (OCTAE) defines distance education for adult basic education programs as follows:

*Distance education is a formal learning activity where clients and instructors are separated by geography, time, or both, for the majority of the instructional period. *Distance learning materials are delivered through a variety of media including, but not limited to, print, audio, recording, videotape, television broadcasts, computer software, web-based interaction, and other online technologies. Teachers support distance learners through communication via mail, telephone, e-mail, or other web-based technologies or software.*

*Completion of instructional activities in a computer lab for in-person classes does not qualify as distance education.

Adult Education and Family Literacy Learners Defined

AEFLA learners are identified in three ways:

- **In-Person Learners** are clients who receive the majority of their instruction via in-person instruction.
- **Distance Learners** are clients who receive the majority of their instruction (51% or greater) through state approved distance education services including virtual classrooms/platforms (e.g., Zoom, Google Meet, Microsoft Teams, etc.).
- **Blended Learners** are clients who receive a majority of their instruction through in-person instruction and also participate in distance education activities. For NRS reporting purposes, blended learners are usually classified and reported as in-person learners. However, at the end of a program year, if a client's attendance hours are logged as 51% or higher in distance education, then the client will be classified as a distance learner.

Approved Distance Education Hours

All clients must accrue at least 12 hours of contact with an AEFLA program before they may be counted for federal reporting purposes. There are two types of client hours that may be counted: *contact hours* and *proxy hours*.

Contact Hours: are defined as time spent interacting with the client. Contact hours for distance education learners can be a combination of direct contact and distance activities such as contact by telephone, video, teleconference, or other online communication where identity of the learner can be verified.

Proxy Hours: are defined as the time distance education learners spend engaged in state approved

distance education activities. The hours are calculated using one of three approved distance learning models of instruction - the model used in Montana AEFLA programs will vary depending upon the approved curricula:

- *Clock Time Model*: assigns contact hours based on time that a client is engaged in a software program that tracks time.
- *Teacher Verification Model*: assigns a fixed number of hours based upon teacher determination of the extent to which a client engaged in, or completed, the assignment.
- *Learner Mastery Model*: assigns a fixed number of hours based on the client passing a test on the content of the lesson.

While using proxy hours, it is important to understand that the identity of the client and the exact time spent on a learning activity cannot always be verified directly. Proxy hours are an approximation of what the “average” client needs in order to reach a mastery level.

Approved Distance Education Curricula

Montana recognizes a variety of sources as distance learning curricula.

See **Appendix B** for a complete list of current state approved distance education curricula and their respective, approved proxy-hour models. The state will approve additional curricula based on investigation and data analysis and as new distance education materials become available. If additional curriculum is approved, Appendix A will be updated.

Programs wishing to use or develop curricula and/or materials not identified in Appendix A must submit a request to the state and the request must be approved before proxy hours can be reported for clients using the proposed new distance education curricula.

Section C – Assessment and Reporting

Assessing Distance Education Learners

AEFLA programs will assess distance education learners utilizing the approved assessments and will follow all program and administrative guidelines contained herein.

Reporting Distance Education Learners

Programs will count and record both direct contact hours and proxy hours into LACES. Contact hours and proxy hours are recorded separately. At the end of each program year, LACES will classify clients as either distance learners or an in-person learners, depending on where the majority of their time (51% or more) was spent.

Under NRS reporting requirements, clients in distance education will be reported in Table 4C (**Appendix C**) and Table 5A (**Appendix D**). These tables demonstrate the program’s performance each fiscal year specific to distance education activities.

- **TABLE 4C** reports educational gains and attendance for distance learners. This table is identical to Table 4 with the exception that only clients identified as distance education learners will be reported. No in-person clients will be reported on this table.
- **TABLE 5A** reports follow-up outcomes on distance learners. This table is identical to Table 5 with the exception that only clients identified as distance education learners will be reported. No in-person clients will be reported on this table.

Section D – Funding for Distance Learning

State Contribution

No additional funding will be provided. The reallocation of existing resources may be necessary. Programs that implement distance learning have the potential to increase their total clients served and receive additional funding via the state-imposed performance-based funding formula.

Program Contribution

Programs that wish to implement distance learning must adhere to the Montana Distance Learning Assessment Policy and Protocol Guidelines. Programs may need to fund additional time and resources to implement distance education. Adjusting budgets accordingly during the first year of implementation is advised.

APPENDIX A

TABLE 11

Outcome Achievement for Participants in Integrated Education and Training Programs

Enter the number of all participants in Integrated Education and Training programs for each of the categories listed.

Table 11
Outcome Achievement for Participants in Integrated Education and Training Programs
 Enter the number of all participants in Integrated Education and Training programs for each of the categories listed.

Primary Indicators of Performance	First Period of Participation			All Periods of Participation		
	Number of Participants Included in the Indicator	Number of Participants Achieving Outcome or Median Earnings Value	Percentage of Participants Achieving Outcome	Total Periods of Participation	Total Number of Periods of Participation in which Participants Achieved Outcome or Median Earnings Value for All Periods of Participation	Percentage of Participants in All Periods of Participation Achieving Outcome
(A)	(B)	(C)	(D)	(E)	(F)	(G)
MSG via Achievement of at Least One Educational Functioning Level Gain						
MSG via Attainment of Secondary School Diploma/ Recognized Equivalent						
MSG via Secondary or Postsecondary Transcript						
MSG via Progress Toward Milestones						
MSG via Passing Technical/ Occupational Skills Exam						
Employment Second Quarter after exit						
Employment Fourth Quarter after exit						
Median Earnings Second Quarter after exit			N/A			

(NRS Technical Assistance Guide)

APPENDIX B

The state of Montana has approved the following curricula for distance learning.

Class Name	Model	Awarding PCH	Credit	Information
Khan Academy	Clock Time Model	Web-based program offered through the internet with teacher guiding clients to lesson/serve assessments.	Clients log in with their assigned passwords, and the teacher tracks their time, which is recorded into LACES.	Khan Academy Website: www.khanacademy.org
IXL Learning	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity. Also demonstrates mastery of topics and levels based on questions and quizzes per individual client.	Clients log in with their assigned passwords, the software program tracks their time and progress. Requires a yearly Subscription.	IXL Learning, Inc. California Headquarters 777 Mariners Island Blvd., Suite 600 San Mateo, CA 94404 Phone: 855-255-8800 Website: https://www.ixl.com
Burlington English	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Burlington English Inc. 4800 N. Federal Hwy. Suite E207 Boca Raton, Florida 33431 Phone: 561-672-7826 Fax: 561-672-7827 Website: https://www.burlingtonenglish.com

Class Name	Model	Awarding PCH	Credit	Information
ACT Work Keys Curriculum	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	ACT Work Keys Curriculum 500 ACT Drive PO Box 168 Iowa City, IA 52243 Phone: 319-337-1270 Website: https://www.act.org/content/act/en/products-and-services/workkeys-for-educators/curriculum.html
Study Island	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Edmentum 5600 W 83rd St Bloomington, MN 55437 Phone: 800-447-5286 Email: info@edmentum.com Website: http://www.edmentum.com https://app.studyisland.com/cfw/login/
EdReady	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	EdReady Montana at the Montana Digital Academy 32 Campus Drive, Room 315 Missoula, MT 59812 Phone: 406-203-1812 Website: http://edreadymontana.org/
Desire2Learn	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Bright Space 151 Charles Street West Suite 400 Kitchener, ON, Canada N2G 1H6 Website: https://www.d2l.com/

Class Name	Model	Awarding PCH	Credit	Information
Touch-Type Read & Spell	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Touch-Type Read and Spell (TTRS) Ltd, Chislehurst Business Centre, 1 Bromley Lane, Chislehurst, Kent BR76LH United Kingdom Website: https://www.readandspell.com/us/
Actively Learn	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Actively Learn 220 2nd Ave S. Fourth Floor Seattle, WA 98104 Phone: 855-862-5505 Website: https://www.activelylearn.com
New Readers Press	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	New Readers Press 101 Wyoming St. Syracuse, NY 13204 Phone: 800-448-8878 Website: https://www.newreaderspress.com/
Essential Education	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Essential Education 895 NW Grant Ave. Corvallis, OR 97330 Phone: 800-460-8150 Website: https://essentialed.com
NYSED/CUNY Fast Track GRASP Math Learning Modules	Teacher Verification	Modules – Teacher determines percentage of work completed.	24 hours per module (Part 1 and 2) with greater than 75% accuracy, 50 – 75% accuracy = 12 hours	City University of New York Adult Literacy/HSE Program City University of New York University Offices 205 East 42nd Street New York, NY 10017 Website: http://www.collectedny.org

Class Name	Model	Awarding PCH	Credit	Information
No Red Ink	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with assigned passwords, access assignments uploaded by teacher, and complete assignments after accessing lesson materials provided by the program. The software tracks client completion and gives estimates for individual assignments.	No Red Ink 118 2nd Street, 3rd Floor San Francisco, CA 94105 Website: www.noredink.com
Kentucky Educational Television Workplace Essential Skills and Soft Skills	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Kentucky Educational Television 600 Cooper Drive Lexington, KY 40502 Website: https://education.ket.org/adult-education/
ReadWorks	Teacher Verification Model	Web-based program offered through the internet with teacher guiding clients to lessons, assessments, and skill building activities.	Clients log in with their assigned passwords or class codes, the teacher tracks their learning outcomes within the system, gives feedback and direction. Teacher assigns a fixed number of hours based on teacher determination of the extent to which a client engaged in, or completed assignments, assessments, and skill building activities (evidence of progress is tracked in ReadWorks system for each client).	Readworks Website: https://www.readworks.org/

Class Name	Model	Awarding PCH	Credit	Information
Google Applied Digital Skills	Teacher Verification	Web-based program offered through videos and projects. Client logs in with unique username and password. System keeps track of activities completed.	System tracks client completion and gives estimates for lessons. Teacher awards hours based on activity completion and assessment.	Google for Education 1600 Amphitheatre Pkwy Mountain View, CA 94043 Website: https://applieddigitalskills.withgoogle.com/s/en/home
Next Gen Personal Finance	Teacher Verification	Web-based lessons composed of videos, articles, projects, and assessments. Client accesses lessons through Classroom using a unique username. All activities are submitted and tracked through Classroom.	System gives estimates for lessons. Teacher awards hours based on activity completion.	Next General Personal Finance 510 Waverley Street Palo Alto, CA 94301 Website: https://www.ngpf.org/
Typing.com	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity. The system measures time spent typing by tracking <i>only</i> when the user is actively typing. This means that while a user/client is watching one of our videos, reading introductory content, or examining their stars at the end of the lesson screen—the timer isn't keeping track. The program literally takes into account <i>only</i> the time spent typing, as opposed to the entire time spent on a lesson.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	FTW Innovations, Inc. 880 Apollo St El Segundo, CA 90245 Phone: 310-909-8985 Email: contact@ftwinnovations.com Website: https://www.typing.com/

Class Name	Model	Awarding PCH	Credit	Information
Apex Learning	Clock-Time Model	Web-based program where the system keeps track of time and logs clients out after a preset period of inactivity. Also demonstrates mastery of topics and levels based on questions and quizzes per individual client.	Clients log in with their assigned passwords, and Apex tracks their time and progress. Requires a yearly subscription.	Apex Learning 1215 Fourth Ave., Suite 1500 Seattle, WA 98161 Phone: 800-453-1454 Website: https://www.apexlearning.com/apexlearning.com
i-Pathways	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with assigned passwords, access assignments uploaded by teacher, and complete assignments after accessing lesson materials provided by the program. The software tracks client completion and gives estimates for individual assignments.	i-Pathways User/Technical Support Phone: 866-250-5494 Email: support@i-pathways.org https://www.i-pathways.org/
USA Learns	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Sacramento County Office of Education P.O. Box 269003 Sacramento, CA 95826-9003 Website: https://www.usalearns.org/usalearns.org
Canvas/Instructure	Clock Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Canvas/Instructure 6330 South 3000 East, Suite 700 Salt Lake City, UT 84121 Website: https://www.instructure.com/canvas [instructure.com]

Class Name	Model	Awarding PCH	Credit	Information
Ellii	Clock-Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after a preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Ellii PO Box 69052 Tuxedo Park Winnipeg, MB R3P 2G9 Canada Phone: 866-896-7123 Website: https://ellii.com/
GED Connections	Teacher Verification	Video: client self-report to teacher Workbook: teacher determines % of work completed Modules: teacher validates w/ questioning whether client has engaged Practice Tests: online	Video=.5 hours Workbook= greater than 75% of activities completed=4 hours 50-72%=2 hours Internet Activities (total possible 43 hours) Modules=3 hours per module Practice Tests=1 hour per test	Kentucky Educational Television Enterprise Division 560 Lexington KY 40502 Phone: 800-354-9067 Website: https://www.ket.org/education/adult-education/
Spark	Teacher Verification	Web-based program offered through the internet with teacher guiding clients to lessons, assessments, and skill building activities.	System tracks client completion and gives estimates for lessons. Teacher awards hours based on activity completion and assessment. Upon completion of each unit, with a score between 71-100%, clients will receive attendance hours based on Section B – Attendance Records.	National Geographic Learning 200 Pier Four Blvd Boston, MA 02210 617-289-7700 higheredcs@cengage.com
My Open Math Lab	Clock-Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after a preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	My Open Math Lab Email: support@myopenmath.org . Website: https://www.myopenmath.com/

Class Name	Model	Awarding PCH	Credit	Information
Learning Upgrade	Clock-Time Model	Web-based program offered through the internet where the system keeps track of time and logs clients out after a preset period of inactivity.	Clients log in with their assigned passwords, and the software program tracks their time, which is recorded into LACES.	Learning Upgrade Email: info@learningupgrade.com Website: https://media.learningupgrade.com/prod/WebGL/indexFullScreen.html https://web.learningupgrade.com/2021/09/23/new-lms-overview/

APPENDIX C

TABLE 4C

Measurable Skill Gains by Entry Level for Participants in Distance Education

Enter the number of distance education participants for each category listed, total attendance hours, number achieving at least one educational functioning level gain, number who attain a secondary school diploma or its recognized equivalent, and periods of participation outcomes.

Table 4C
Measurable Skill Gains by Entry Level for Participants in Distance Education

Enter the number of distance education participants for each category listed, total attendance hours, number achieving at least one educational functioning level gain, number who attain a secondary school diploma or its recognized equivalent, and periods of participation outcomes.

Entering Educational Functioning Level (EFL)	First Period of Participation									All Periods of Participation				
	Number of Participants	Total Number of Participants Excluded from MSG Performance	Total Attendance Hours for all participants	Number who achieved at least one EFL gain	Number who attained a secondary school diploma or its recognized equivalent	Number of IET or workplace literacy participants who achieved an MSG other than EFL gain and secondary school diploma *	Number Separated Before Achieving Measurable Skill Gains	Number Remaining in Program without Measurable Skill Gains	Percentage Achieving Measurable Skill Gains	Total number of Periods of Participation	Total number of Periods of Participation in which Participants achieved at least one EFL gain	Total number of Periods of Participation in which a secondary school diploma or its recognized equivalent was attained	Total number of IET or workplace literacy Periods of Participation in which Participants achieved an MSG other than EFL gain and secondary school diploma *	Percentage of Periods of Participation with Measurable Skill Gains
(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)	(M)	(N)	(O)
ABE Level 1														
ABE Level 2														
ABE Level 3														
ABE Level 4														
ABE Level 5														
ABE Level 6														
ABE Total														
ESL Level 1														
ESL Level 2														
ESL Level 3														
ESL Level 4														
ESL Level 5														
ESL Level 6														
ESL Total														
Grand Total														

(NRS Technical Assistance Guide)

Include only participants who are counted as distance education participants. Distance education participants are also included in Table 4.

APPENDIX D

TABLE 5A

Primary Indicators of Performance for Participants in Distance Education

Include only participants who are counted as distance education participants. Distance education participants are also included in Table 5.

**Table 5A
Primary Indicators of Performance for Participants in Distance Education**

First Period of Participation				All Periods of Participation		
Primary Indicators of Performance	Number of Participants who Exited	Number of Participants who Exited Achieving Outcome or Median Earnings Value	Percentage of Participants Achieving Outcome	Total Periods of Participation	Total Number of Periods of Participation in which Participants Achieved Outcome or Median Earnings Value for All Periods of Participation	Percentage of Participants in All Periods of Participation Achieving Outcome
(A)	(B)	(C)	(D)	(E)	(F)	(G)
Employment Second Quarter after exit						
Employment Fourth Quarter after exit						
Median Earnings Second Quarter after exit			N/A			N/A
Attained a Secondary School Diploma/Recognized Equivalent and Enrolled in Postsecondary Education or Training within one year of exit						
Attained a Secondary School Diploma/Recognized Equivalent and Employed within one year of exit						
Attained a Postsecondary Credential while enrolled or within one year of exit						

(NRS Technical Assistance Guide)