



Chapter 55 School Quality Task Force Meeting Minutes Thursday, May 5, 2022 9:00 AM – 4:00 PM

Meeting Start Time: 11:00 AM

Roll Call

Task Force Members

Billi Taylor n
Daniel Lee y
David Pafford y
Emily Dean Y
Heather Hoyer N
Gayle Venturelli N
Heather Jarrett n
Janelle Beers y
Jon Konen y
Tony Warren y
Gary Lusin y

BPE Representation

McCall Flynn y

Facilitators

Julie Murgel
Erich Stiefvater
Jacob Williams

Executive Support

Tristen Loveridge
Joan Franke

Welcome and Review

1. Julie Murgel: Review May 5th Outcomes
 - a. Discuss and establish consensus on five completed revisions
 - i. Library Media Specialist Ratio
 - ii. Graduation Requirements
 - iii. Basic Education Program Requirements
 - iv. School Counselor Ratios
 - v. Variance to Standard – Charter School
 - b. Discuss financial literacy as a graduation requirement
 - c. Gather and incorporate feedback on open draft recommendations

Erich Stiefvater: Review of completed revisions

A. Library Media Specialist Ratio:

The committee reviewed document for of rational and language.

Committee Discussion included:

Method of Establishing Staffing Ratio: Adding any other cooperative method, for schools, of establishing its staffing obligation that is approved or authorized.

Moved language from 126 to 150 students to provide more flexibilities for smaller schools that go in and out of compliance from year to year.

Verified that funding was not impacted, schools had to seek variances to standards or receive a deficiency in accreditation.

Discussion if a rationale needs to further define a school system as to school district.

Discussed the calculation of personnel FTE compliance: Include rounding to the hundredth place, somewhere. The Office of Public instruction CFO Jay Phillips has clarified that it would not have an impact. Give a general direction to OPI staff to work with districts. Staffing falls under process and understanding but would like to document the intent in the rationale.

Discussed if committee is focusing on accreditation and deviations instead of what this rule is providing. Should we focus more on minimum qualification to standard that provides quality education for kids. A higher-level discussion or a recommendation to OPI for informed stakeholders to innovatively, high level discussion of education delivery models in our state for the future.

Discussion on timeline, voting on items individual basis or as the end.

Motion to review public comment in the packet, google site.

No Action heard Zoom public comment.

Public comment: (from Zoom)

Diane Fladmo, Director of Policy, Montana Federation for Public Employees:

1. Appreciates the conversation, felt committee focuses on the numbers that do not make a difference to funding but do make a difference to kids. Stated that changes will result in a loss of 21-29 librarians could result from changes. This would be major to our students at a time we are trying to restore learning due to the pandemic. Currently, we need better information and a better understanding on how we vet that information. This is not the time to lower our standards. There have been changes in licensing proposed that will allow K-12 teachers to move over to librarians there has been some easing in this standard. As we move to school system and how librarians are parsed out librarians do we know from a reporting requirement, how many or if we have Librarians assigned to that school building. Trying to move a head to resolve a problem that has not been a problem to schools losing accreditation or funding. We can provide service to schools in other ways is happening. There are many ways this standard be meet. The committee has reviewed the comments from others in written comment.

Presentation from Dr. Carly Urban

- a. Why is financial literacy important?
 - i. Young adults make challenging financial decisions with little information.
 - ii. Only 27% of 23–28-year-old can correctly answer basic questions on interest, inflation, and diversification.
 - iii. 54% of student loan borrowers did not calculate their future monthly payments before choosing a loan.
 - iv. 38% of 18-34 used alternative financial services in the last 5 years (pay day loans, high interest options)
 - v. Young adults are not prepared to be financially independent.
- b. Why financial education in schools?
 - i. Research shows good for students improves both debt and credit outcomes in the long run.
 - ii. Survey in 2022 shows 88% of respondents want this education.
- c. What is currently happening?
 - i. In states where personal finance is required within another course, only 44% of schools require students to complete personal finance content.

- ii. 15 states that have stand alone personal finance classes, more have it within another class. Less than half with embedded requirement do it.
- iii. 8 states have a full semester requirement (Nevada has 5-year outcome report). 5 more states passed in the last year.
- d. What happens after requiring personal finance in high school
 - i. Delinquency rates fall and credit scores improve
 - ii. Student borrowing shifts from high- to low-cost methods
 - iii. Effects are biggest for low-income students
 - iv. Student loan repayment increases, particularly for first-gen students who attend public schools
 - v. Payday lending declines
- e. Subjective financial well-being improves overall but makes some subgroups more “realistic” about future financial situations.
- f. Does not change:
 - i. Retirement savings
 - ii. HS Graduation rates
 - iii. Income
 - iv. College attendance
 - v. College completion
- g. Why a requirement necessary?
 - i. Research shows no impact on short term or long-term benefit.
- h. Financial education meta-analysis
 - i. Thirty-three studies both national and international studies. Effective outcomes like other interventions in Math and reading. Cost effective. When compared to other education interventions.
- i. Montana
 - i. 2017 Making the grade report card D in Montana
 - ii. 76% of students attend schools that offer a personal finance course
 - iii. 6% of students attend schools that guarantee a personal finance class (24% nationally)
 - iv. 8 schools have personal finance classes Absarokee, Anaconda, Box Elder, Hamilton, Polson, Sweet Grass County, Victor. (Glasgow was starting in 2020).
- j. Potential costs of requiring personal finance in schools
 1. Schools with personal finance graduation requirements serve fewer students who qualify for free or reduced-price lunch.
 2. Costs with adding PF guarantees
 3. Resources and implementation
 4. Prepare teacher (tends to improve teachers financial literacy rate and savings rates),
 5. Studies showed that 95% of teachers feel confident they could teach financial literacy.
- k. What implementation could like.
 - i. High quality curriculum, training, and accreditation free of charge.
 - ii. Next- Gen personal finance non-profit resource. 358 teachers in MT using accounts on Next Gen Personal Finance and have completed 1/293 hours with Next Gen.
 - iii. Most states put it in Social Studies, some in a career class. Do not do Math (Australian study shows students do not understand the underlying concepts when it is in math).
 - iv. Montana students deserve the opportunity to start lives with strong financial footing. Learn how to avoid costly financial mistakes, build credit, save for emergencies and build strong financial lives. Benefits to broader population expand the tax base, reducing reliance on the safety net and staying in Montana to start new businesses.

Committee Discussion

1. How will it affect the curriculum of current required courses and electives in MT? will it have a potential negative impact on districts?
 - a. The opportunity cost would be an elective, to the districts. Every state that has already done this has looked at their curriculum to find what to cut. They were more crowded than MT though.
2. How will it affect the curriculum of current required courses and electives in MT? will it have a potential negative impact on districts?
 - a. The opportunity cost would be an elective, to the districts. Every state that has already done this has looked at their curriculum to find what to cut. They were more crowded than MT though.
3. What Interested in the type of feedback the studies received when they reached out to communities and parents?
 - a. Just this year 80 people expressed they would like to see this in public schools. It has not only improved student learning but also parent learning. There have not been any cases where parents have expressed not to do this.
4. **If Personal Finance were to go forward rename the course into economics.**
 - a. Teachers are already endorsed to teach economics and it can align with courses like AP micro and macro courses. Great idea in theory and to do what you can with what you have. Implementation of finance is lower (less than 50% implemented) as teachers would not see a change. If this is the only option that is an ok path but would not see large-scale effects. If it's in economics and personal finance and social studies ... It is currently in the content standards under economics. There is a lot of curriculum social studies teachers must teach presently, they only touch on each. By putting it in Economics you do not have to have a new set of standards and endorsement areas.
5. **Asks for details on states if they did require finance because they wanted to or because they had to and where most unfunded?** Yes, most are unfunded, a lot of **nonprofits, and businesses have offered resources and funds.**
6. **States have had programs over the past 40 years in this area, why it has cycled out?** Quite different models, not based upon research and did not change behaviors were being used. Often one information session, often with conflict of interest (accounts/credit cards).
7. **Personal finance already exists in the economic and CTE standards.** Sometimes see it in CTE, there are options if this is a path Montana wants to take.
8. **Are we not already talking about including a civics requirement for graduation? Is this another request to add a second graduation requirement? If it is a second, concerned we are losing sight of our conversation to keep local control in the curriculum.**
9. **Social studies requirements are already crowded.** How does this affect schools already doing it and for school districts that are not doing this, why? Would we be taking away an elective in schools, especially in small schools?
10. **Implementation:**
 - a. Tony Warren, shares what he has done in the two schools he has been a superintendent of to encourage students to take the personal finance course. Took out a computer application course in High School as most students are proficient by then. Encouraged Juniors and Seniors into a semester personal finance class. Rhode Island implemented a semester requirement with opt-out options: taking a course outside the classroom and completing a related project or taking a test to opt out.
11. **Teacher Shortages: Due to teacher shortages is there any online platforms that exist?**
 - a. NextGen and the WIZE group and an online platform called money skill, Ever Five, Dave Ramsay.
12. **Fiscal Impact:**
 - a. When we look at the possible fiscal impact, there is an over-encompassing piece of what education should look like in MT. We are continuously coming to a stopper with a fiscal impact. We need more

feedback on the impact of this discussion. The Board of Public Education was asked to have this discussion in July.

- b. Around, Personal financial was a joint resolution, and is curious why it was not moved forward. Comments on what is getting in the way of what is happening to prevent districts from leveraging their flexibility to provide these topics.
 - c. Everything has an opportunity cost. In the past, looking at ... every school must meet basic standards then additionally include what their communities would like to prioritize. We see that if we prioritize... districts take advantage of the programs. Are there ways we can incentivize not only fiscally?
 - d. There was a bill in the 2021 legislative session that would have financial literacy ... BPE opposed the bill to allow the process to go through the review process rather than requiring it through legislation. If there is a time to do it, the time is now.
 - e. This is a topic that needs to be in the larger stakeholder group discussion to review all the potential changes. There is a need to discuss these topics with schools.
13. **Do we know or need to know why the Superintendent passed this to us?** There are a lot of conversations out there that have been going to the legislature and BPE asking to act on things that have been out there for a while. We heard from Dr. Urban that she spends time with other state agencies, and it was refreshing to talk to Montana.
14. OPI supports districts in content areas that are not in the requirements. Can OPI offer support to districts with more support? This is a good question, but we are at the beginning pieces for this but not at a stage it is around other areas but not economics. It is a little unfair to add this to our plate with one meeting left. The Task of this group is our job to determine what things would contribute to improving quality in our state. Not to consider the fiscal note.
15. David Pafford: Makes a motion for the CH55 Task Force to send the recommendations for 10.55.709 to the Superintendent of OPI. Staffing recommendations for Library Media Specialists.
- a. Janelle Beers: Seconds the motion
16. Vote on the motion
- a. Janelle Beers yes
 - b. Jon Konen Yes
 - c. Emily Dean Yes
 - d. Tony Warren Yes
 - e. David Pafford Yes
 - f. Daniel Lee No
 - g. Gary Lusin No
17. Motion passes 5 to 2 on 10.55.709 to send to the Superintendent of OPI. Staffing ratio for Library Media Specialists.

Graduation Requirements

1. Discussion: Review of redline 10.55.905 2(a) the language is inconsistent with what the task force had decided. (c) task force discussion to take out ARM reference. Task force discuss language and make appropriate changes. Review where the half unit of civics and government came from. Part of graduation requirement and basic offering from schools. Data was collected on the number of schools that are or are not currently offering a civics/government course. Only 12 schools were not offering a course, but after further investigation there are only 3 schools in MT that are not currently offering some sort of civics/government course.
2. Jon Konen: Moves to approve the graduation requirements.
 - a. Tony Warren: Seconds the motion
3. Vote on the motion
 - a. Janelle Beers Yes
 - b. Jon Konen Yes
 - c. Emily Dean Yes
 - d. Tony Warren Yes
 - e. Gary Lusin Yes
 - f. David Pafford Yes

- g. Daniel Lee Yes
 - i. Vote passes unanimously

Basic Education Programs 10.55.901 for Elementary Grades

1. Daniel Lee: Moves to approve the Basic Education Programs
 - a. David Pafford: seconds the motion
2. Vote on the motion

<ol style="list-style-type: none"> a. Janelle Beers yes b. Jon Konen Yes c. Emily Dean Yes d. Tony Warren Yes 	<ol style="list-style-type: none"> e. David Pafford yes f. Gary Lusin Yes g. Daniel Lee Yes
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 - i. Vote passes unanimously

Basic Education Program Middle Grades 10.55.902

1. Discussion Proposal language adjustment in (3)(vi) and (3)(e). Concern about striking the electives included in (3)(e) electives. Nathan Miller that these electives are especially important in middle school and by striking this language these electives would not be required to be offered. Heather Jarret had indicated that for middle schools and for small schools it can be the constraining and difficult to meet. Propose to include minimum language. The Administrative Rules is the minimum standard on which quality schools are built. Most districts do more than that.
2. Proposes to include in (e) recommends adding “at a minimum” maintaining the following elective areas
3. Task Force discussion of language and rationale

Is not clear if we are trying to recommend including all items under (e). concern is advocating for standards that take away minimum standards Part of the problem is that small schools may have one elective but not another. Is there an opportunity to have a list of basic electives to choose from? The concern is equity of education. Students in more rural areas may not have access to certain electives. One of the key issues are the number of students that can be in a course. If a district has a limited number of students to offer electives to, that will create issues with the master schedule. if there is anything we have learned through covid is the ability to offer education through different modes to many areas. Perhaps some of the electives may not be driven by place so much. There are opportunities for virtual teaching, but a lot of the electives will demand hands on activity. This could be a double-edged sword, taking this language out gives districts flexibility to tailor what electives and classes look like. In the same sense, schools that does do that, we need to ask what a basic education needs to be in Middle School. We have been hearing a lot about choice. Which of these options provide choice and which take choice away? Proposal to include language in (vi) “Elective offerings at the discretion of local board of trustees and with in the ability of a district to fund and staff the following minimum electives” and include the list. This establishes a minimum and still allows flexibility of the local board of trustees within the ability of the district to fund and staff the following program areas: List areas.
4. Tony Warren: Moves to adopt changes as amended
 - a. Emily Dean: seconds the motion
5. Vote on the motion

<ol style="list-style-type: none"> a. Janelle Beers Yes b. Jon Konen Yes c. Emily Dean Yes d. Tony Warren Yes 	<ol style="list-style-type: none"> e. Gary Lusin Yes f. David Pafford Yes g. Daniel Lee Yes
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 - i. Vote passes unanimously

Basic Education Program High School 10.55.904

1. Necessary grammatical change to (2)(j) At the discretion of the local board of trustees
2. Jon Konen: Moves to adopt changes
 - a. Janelle Beers: Seconds the motion
3. Vote on the motion

<ol style="list-style-type: none"> a. Janelle Beers Yes b. Jon Konen Yes c. Emily Dean Yes d. Tony Warren Yes 	<ol style="list-style-type: none"> e. Daniel Pafford Yes f. Gary Lusin Yes g. David Pafford Yes
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 - i. Vote passes unanimously

Variance to Standards-Charter School

1. Reviews the rationale for language – Charter School. Proposes to keep the charter school term. Most people outside of the public-school employment scope do not fully understand how public schools operate. This gives us an opportunity to educate legislators that you do not need an entirely new code or process to operate a Charter School. If Charter School is not in ARM, we risk other places that are not accountable to community elected school boards and are public funded. Our system now provides flexibility. Are we setting ourselves up to highlight the portion that we can already do per code? If we, have it now, why are we highlighting? The proposal to pull this language out of 604 to become its own section because it was difficult to find before. Has question about the timeframe of turning in the application, ensuring it moves through the OPI and BPE to be put in place.
(2)-(11) in previous discussions was that this information wouldn't be repeated but would include language that directed to 10.55.604 Recommends to strike (2)-(11) and direct to 10.55.604
2. Language in (1)(a) and notes that if 2-11 is struck, we need to ensure (e) remains. How a district may discontinue an approved Charter School.
3. If we can already do this, why does Charter Schools need to be included in accreditation?
 1. Provides insight and reasoning that would benefit the BPE in process and throughout legislature.
 2. Clarifies this is also included in chapter 55 as is.
4. Currently in MT, private charter schools do not have an avenue to come into MT. A charter school utilizes public funds.
5. Gary Lusin: Motion to adopt 10.55.608 as amended
 1. Emily Dean: Second
6. Vote on the motion

<ol style="list-style-type: none"> 1. Janelle Beers Yes 2. Jon Konen No 3. Emily Dean Yes 4. Tony Warren No 	<ol style="list-style-type: none"> 5. Gary Lusin Yes 6. Daniel Lee Yes 7. David Pafford Yes
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 - i. Vote passes 5 to 2

School Counselors

1. Reviews the thought process, work, and rationale behind proposal for school counselor ratios. Lower ratios from 400 students to 1 to 300 to 1. Feedback was given at the state counselor meeting. Need to improve ratio. 1 in 3 High School students are persistently sad and hopeless.
2. Data received from the Youth Risk survey will support the proposal. Looking at the youth suicide rate in MT, this is a step in the right direction.
3. This is a critical subject for everyone. He reminds the task force of the Superintendents comments at the beginning of this work to be bold, daring, and not to worry so much about the fiscal impact.
4. Would like to include a three-year average for the 1 in 126 ratios to help with compliance issues.

Are we looking at this as a system or district? Give districts the greatest flexibility. Worry is about finding the people to fill these positions. That is a large concern. There is negative publicity for MT about starting pay in education. This is a state-level situation that needs to be addressed. We can make the same argument for supply issues in education right now. We will figure out how to train more and how to recruit more from out of state. We are

not here to solve that problem but to figure out what is best for MT students.

5. Task Force discussion of language and how to incorporate school systems

In a larger district, how will they fund additional counselors because of the change? Are the counselors available to fill those positions? That is a good question, but it will be reflected in the economic impact statement that the Negotiated Rule Making to complete. If we prioritize this as a task force and make it clear to the Superintendent that this should be a focus, it may carry over to future discussions.

6. Currently across systems we are meeting a ratio of 1/311

7. The MTSBA legal team has offered to review all our recommendations to provide legal analysis between now and May 19th.

8. Jon Konen: Moves to approve proposed changes to 10.55.710

a. David Pafford: Seconds the motion

9. Vote on the motion

a. Janelle Beers Yes

b. Jon Konen Yes

c. Emily Dean Yes

d. Tony Warren Yes

e. Gary Lusin Yes

f. Daniel Lee Yes

g. David Pafford Yes

i. Vote passes unanimously

Accreditation

1. Reviews group work and read a letter regarding the accreditation process. The current process is not broken. It is more of an accreditation process rather than an approval process that we have now. Need more time, larger and more diversified group. Read letter sent to OPI, need more help for our schools to develop and improve. Need OPI and/or BPE to develop a think tank. Continue research of other states. Honor local control of state values, that accreditation would support while giving options to meet school standards. Include Multi-year options to meet accreditation.
2. Will the rest of the work that is going to go forward, carry any weight if we cannot recommend changes to the accreditation process itself? If we need more time, energy, and information to get the process right, what will things look like with revisions to standards for the process? The other recommendations are regarding the Chapter 55 rule. The title of the rule is the problem. School Accreditation is not really what we have been doing in MT. To make a good decision you need time and information.
3. We have a couple of paths. 1. is to look at what changes we can suggest to the accreditation process now. If we don't make any changes, we're essentially saying it can continue the way it is. If we can say to people, that there are changes to be made but we need time to discuss. Supports what the task force is working towards.
4. We need to take a deep dive into schools. Where do we want to be? What do we want to change? Where can we improve? If we had to demonstrate a level, we are low. Need to raise the bar. This is a component that affects all education and funding in the state.
5. What if assessments are changed in MT. This is interrelated to accreditation. Accreditation needs many paths and needs to include growth. Presently looking at Assessment and Center of Assessment and a grant proposal to support this work. 8 other states also considering this. There needs to be multiple pathways and for the schools that use Cognia, Cognia needs to be one of those pathways. Needs to be for more than one year, with some oversight.

Schools not accredited could look at a yearly growth model. Having a 3-year tiered level of support from OPI. OPI could focus on those schools that were not accredited. The recent survey's highest choice was to accredit every 2 years.

6. Family Engagement and Post-secondary Readiness

- a. Could not find information in the current statute. Found policy at the local level. 10.55.701 has school board language. Also, in the district's strategic plan. Did not feel needed revision.

Mentorship and Induction

1. Reviewed the discussions and work. Including it in the reporting system. Gets districts to think about how they are supporting their teachers. Could also be a good recruitment tool. Districts can develop a mentorship program that may support in areas or ways candidates may not get in other areas. Would it benefit us to have something in language about the outcomes to come from these expectations? Can we include "define multiple measures? Can look at the school improvement plan components to see how districts are already required to measure the success of their plan. Perhaps the school improvement plan could be every three years. The program they have set up does a good job of coaching teachers through the housekeeping duties throughout the district. Proposes to include the establishment an evaluation measurement.
2. Wellness and School Climate included in school counselor piece.

Public Comment:

Public Comment

1. Diane Fladmo Director of Policy, Montana Federation for Public Employees:
 - a. I appreciate the opportunity to have another short conversation with you today. And I appreciate the work you are doing today and the deliberations that you have done today. I have watched this process and unfortunately, the process has been hurried and involved too few people. That is not to say for one minute I do not appreciate all the work you have done. For example, I appreciate your work on school counseling today and making a bold determination, that in fact likely will not be so concerned how much it will cost but concerned about the students and what's happening with them. The decision on school Librarians did not lead me to the same conclusion. That decision seemed to be based more on supply or the difficulty on recruiting and retention. And I think that can't be the issue that directs us to the right decision. And it was pointed of course as I mentioned earlier today that in terms of punitive results for students that there are schools that couldn't recruit that there weren't any. This is just a way to point out that school librarians are important. They do help students, they help teachers, and they are very entwined with the need for technology, and I'd consider further considerations there. I was very pleased to hear your work on mentoring. And as we consider the results of our mentoring, I think one of the easy measures might be what do our new teachers think about the mentoring program they have experienced and how might it be improved. That is just an example of something that might work better than trying to compare evaluations from one year to the next, because of changes in personnel. But I love the idea of connecting with our university system and their work on mentoring. I would also suggest that those who only have one teacher in their school that works in the area, be paired with a teacher in another district who is an expert in that field. And I think that recently MFP could help in that regard and help you connect with many quality teachers that we have in the field in all kinds of areas. So, I look to offer our support and help. And looking forward to looking at what is best for kids. I appreciate your work, keep it up, Thank you.
2. Angela Archuleta, KW Vina Elementary, Browning School District 9
 - a. [Written Public Comment Submitted](#)

Next Steps

3. May 19th is next meeting, if there are any additional items for consideration of the task force., have it ready to send by the 12th. The 19th will be used to clean up items and get them ready to move forward.

Meeting Adjourned: 3:55 PM