Making Opportunity Affordable

Opportunity Grant Program Proposal
Office of the Commissioner of Higher Education

Submitted to:
Lumina Foundation for Education

September 11, 2009
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Section 1 – Problem and Solution

With an aging workforce, projected declines in the numbers of high school graduates and working-age adults, and the workforce demands of the 21st century, Montana urgently needs an accessible and affordable system of two-year postsecondary education. The major components of such a system exist: Montana has 15 two-year colleges, strategically dispersed throughout the state. Nonetheless, only 24 percent of the 42,000 Montanans enrolling in college each semester attend a two-year college. As noted in our Learning Year proposal, of particular concern is the under-enrollment of demographics that especially benefit from two-year education: adults, dual-credit students, low-income individuals, American Indians, and the academically underprepared.

Our Learning Year proposal targeted increasing two-year enrollments among these demographics as the key to increasing two-year degree production, successful transfer, and ultimately four-year degree production. Our Learning Year activities, especially the opportunity analysis, focus groups, and statewide conferences, revealed that Montana’s two-year education problem goes beyond under-enrollment – right to the heart of the MOA productivity agenda. Fall-to fall persistence rates in Montana’s two-year colleges rank 50th nationally. Although our policies encourage completion of recognized transfer credentials, only 18 percent of Montana students transfer with a credential and only one-third of students completing a transfer degree appear actually to transfer. Two-year tuition is significantly lower than the four-year rate, but the paucity of need-based aid for two-year students makes affordability (and persistence) an issue. Averaged, our cost-per-student looks good, but some of our two-year colleges have costs-per-student as high as our research universities’.

In short, Montana’s two-year sector is not just under-subscribed but under-productive – and our MOA activities revealed why. Access, completion, transfer, efficiency, and affordability are all thwarted by fragmented delivery of the two-year mission; inconsistent approaches to programming and funding; failure to meet adult and rural needs; and lack of state-level coordination needed to promote productivity.

How will Montana address these problems?

- We will refocus the missions of all Montana University System campuses to ensure the comprehensive two-year college mission is available at all two-year colleges. With every two-year college offering affordable, student-centered, high-quality transfer and workforce degrees, as well as college/workforce readiness programs, we can brand them all compellingly and distinguish them clearly from their four-year counterparts. By shifting these programs to the
sector with lower costs, we will create savings that can be reinvested in affordability and innovation measures.

- We will improve access, student success, and efficiency through state-level coordination and collaboration. We will develop common core requirements and shared articulations for workforce and transfer programs to facilitate readiness, dual enrollment, and transfer. We will develop programming specifically tailored for adult engagement and completion. Through collaborations at state and local levels, we will ensure that in every region, when business, industry, government, or K-12 schools have a need, two-year colleges respond effectively. These efforts will underscore our commitment to educate and train our people more affordably.

- We will create capacity – through curricular alignment, partnerships and integrated technology solutions – for sharing courses and programs; streamlining business practices, student services, and student transitions; documenting results; and creating savings.

- We will create funding incentives at the student and the institutional levels to promote degree completion and assure quality.

Montana’s MOA initiative has been a major focus of the Board of Regents. It aligns well with the productivity, affordability and efficiency goals in the Regents’ strategic plan, adopted in 2007. Commissioner Stearns’ current workplan identifies the initiative as a priority. Superintendent of Public Instruction Juneau has recently developed K-12 strategies that will support our MOA strategies. With the governor’s emphasis on affordability and efficiency and the legislature’s interest in performance metrics, the stars are aligned to advance Montana’s MOA agenda.

Section 2 – Goals, Objectives, and Measures

The goal of Montana’s MOA initiative is to increase the state’s educational attainment levels from 35 percent in 2008 to 55 percent in 2025, representing an overall increase of 24,500 degree recipients. Our objectives for achieving this goal, tested through applications of the student flow analysis (Appendix D-1), are to increase enrollments, transfers, completions, and efficiency at the two-year college level. Specific objectives related to the MOA goal are categorized below in terms of Montana’s performance metrics for this initiative:
Montana MOA Objectives

Over the next four years, two-year education in Montana will:
(includes all two-year education providers)

<table>
<thead>
<tr>
<th></th>
<th>2009 level</th>
<th>2014 target</th>
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</thead>
<tbody>
<tr>
<td>1. <strong>Enrollment</strong>: Increase enrollment by 22% (unduplicated fall headcount)</td>
<td>13,209</td>
<td>16,056</td>
</tr>
<tr>
<td>2. <strong>Transfer</strong>: Increase transfer from two-year to MUS four-year campuses by 75%</td>
<td>370</td>
<td>648</td>
</tr>
<tr>
<td>3. <strong>Completion</strong>: Increase the number of degrees and certificates by 45%</td>
<td>2,110</td>
<td>3,089</td>
</tr>
<tr>
<td>4. <strong>Efficiency</strong>: Decrease expenditures per completion by 25%</td>
<td>$41,382</td>
<td>$30,543</td>
</tr>
</tbody>
</table>

The MOA core productivity metrics reinforce Montana’s specific measures. The primary productivity measures are presented below, with a complete set included in Appendix D-2.

Montana Productivity Measures

<table>
<thead>
<tr>
<th></th>
<th>2007-08 benchmarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Completions per 100 FTE Students</td>
<td>21.2</td>
</tr>
<tr>
<td>2. Total Enrollment by Race, by Family Income (Pell)</td>
<td></td>
</tr>
<tr>
<td>% Minority</td>
<td>8%</td>
</tr>
<tr>
<td>% Receiving Pell</td>
<td>29%</td>
</tr>
<tr>
<td>3. Current Unrestricted Revenue (state/local/tuition) per FTE</td>
<td>$10,035</td>
</tr>
<tr>
<td>4. Education &amp; Related Spending (E&amp;R) per FTE</td>
<td>$10,591</td>
</tr>
<tr>
<td>5. Instructional Spending within E&amp;R</td>
<td>46%</td>
</tr>
<tr>
<td>6. Student Share of Costs</td>
<td>33%</td>
</tr>
<tr>
<td>7. Tuition Spending Comparison</td>
<td></td>
</tr>
<tr>
<td>Actual Difference between 2004 and 2008 Tuition &amp; Fee Levels</td>
<td>$729</td>
</tr>
<tr>
<td>Estimated Difference between 2004 and 2008 Tuition &amp; Fee Levels (based on 2004 to 2008 actual growth in E&amp;G)</td>
<td>$997</td>
</tr>
<tr>
<td>Ratio, Estimated Tuition &amp; Fees to Actual</td>
<td>137%</td>
</tr>
<tr>
<td>8. E&amp;R Spending per Completion</td>
<td>$49,956</td>
</tr>
</tbody>
</table>

Note: IPEDS finance data for integrated colleges of technology (COTs) in Montana are reported within associated four-year campus data. As a result, integrated COT data are not included in these measures. Further, these data do not include MT Tribal Colleges. For these reasons, baseline spending per completion differs from the first table, which is based on more comprehensive state data on all two-year providers.

As noted in the previous section, increased utilization and efficiency of two-year education is a component of the Board of Regents’ strategic plan. The measures within this plan, particularly those pertaining to two-year education and transferability, have been reviewed by the legislature’s interim education and finance committees. Future measuring and monitoring of the metrics presented above will be conducted by the Montana Office of the Commissioner of Higher Education and monitored by the Montana Board of Regents. Savings from lower expenditures per completion will be used to increase enrollment, transfers and completions.
Section 3 – Policy Plan

Montana’s Policy Context

Nearly 300 Montana policy leaders from diverse agencies and sectors have engaged in the MOA opportunity analysis, focus groups, surveys, and conferences designed to clarify the policy context for productivity in Montana’s two-year education sector. In brief:

- **Access/Capacity/Retention.** The comprehensive two-year mission, especially adult basic education and transfer programming, is not available at all Montana two-year colleges, making access uneven and contributing to the lack of public confidence in the two-year option.

- **Readiness.** Entry-level proficiencies differ from program to program and entry-level proficiencies for the same programs differ by college. As a result, the varying levels of readiness required for two-year degree programs are not communicated clearly, when they are communicated at all.

- **Curriculum/Transfer.** Programs for transition of high school students into college (dual enrollment) and for transfer from two-year to four-year programs are decentralized and vary widely in cost and content throughout Montana. As a result, they are generally not used in more than a course-by-course way.

- **Affordability.** Two-year tuition rates in Montana currently lag behind four-year tuition rates by only 29 percent – the smallest differential in the region. Montana’s emphasis on merit-based aid, as opposed to need-based aid, negatively affects enrollments and completions at two-year colleges. Affordability factors affecting adults – e.g., childcare, scheduling – remain largely unaddressed.

- **Efficiency.** Program duplication, particularly online, has been difficult to contain. Program variation complicates dual enrollment and transfer. Differing information systems hinder sharing resources and data analysis. Imbalances in academic program mix, duplication of personnel and technology investments, and under-enrollment relative to capacity add to cost per student and cost per degree.

Montana’s Action Plan

To address this policy context, Montana will implement four basic strategies, which reflect the Board of Regents’ resolutions of May 2009 and August 2009 (Appendix A):

1. **Bring the full community college mission to all two-year colleges and designate them as regional “hubs” for high school to college transitions, adult access, and workforce development.** This
strategy and its related tactics will address the access and image issues revealed in the opportunity analysis and focus groups, tailor programming to the needs of working adults and high school students, and respond to regional needs for higher education at the lowest cost for students and state.

2. *Create common curriculum and coordinated approaches to facilitate high school to college transitions and two-year to four-year transfer.* Common core requirements in workforce programs, a common “Regents’ transfer core,” standard protocols for dual enrollment and shared 2+2 articulations will promote system-wide efficiencies and quality assurance while addressing the issues of image, readiness, dual enrollment, and completion of a recognized transfer credential noted in the opportunity analysis.

3. *Develop the technological infrastructure to expand access, demonstrate quality, and create efficiencies.* This strategy involves two tactics: (a) collaboration on a virtual community college that will become both the catalyst for and the beneficiary of common curriculum and shared programming and (b) the development of a more integrated enterprise information system that will provide greater access for students, improved data processing, and shared resources. This effort will begin with the integration of one community college (Dawson Community College) into the Montana University System enterprise information system.

4. *Implement outcomes-based funding strategies.* The Administration and Finance Committee of the Board of Regents has charged the Deputy Commissioner for Administration and Finance with identifying and implementing outcomes-based funding for the entire Montana University System. Our MOA State Implementation Team will participate in that effort, focusing on the two-year sector.

**Action Steps**

The table below delineates the action steps Montana will take in pursuing these four strategies. The key action step is presented in the first column and its connection to one or more of the three MOA productivity goals is provided in parentheses. Details on each action step in the first year and subsequent years are provided in the second and third columns.
### Montana’s Action Strategies

**1. Full Two-Year Mission at All Montana Two-Year Colleges Serving as Regional “Access Hubs”**

<table>
<thead>
<tr>
<th>Montana Strategy/Tactics</th>
<th>First Year</th>
<th>Subsequent Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bring adult basic education and developmental education to all tribal colleges and colleges of technology.</td>
<td>Convene developmental program providers to plan for transition of programs to two-year colleges. Convene adult ed providers, develop plan for bringing existing providers’ programs onto college campuses; consider necessary statute changes.</td>
<td>Shift developmental programs to two-year colleges by Fall 2011. Bring adult basic education to three colleges by Fall 2010; to all colleges by Fall 2012. Advocate for statutory changes as needed. Assess equivalency diploma completion and transition to two-year programs.</td>
</tr>
<tr>
<td>Ensure that two-year colleges respond to workforce needs in their regions. (Educate affordably)</td>
<td>Identify best practices in responding to workforce development. Create feedback tool on responsiveness of “hubs” to business, K-12.</td>
<td>Implement best practices, feedback tool on three campuses Fall 2010. Monitor results, improve practices/tool, expand to other colleges and reassess in subsequent years.</td>
</tr>
<tr>
<td>Develop adult-focused approach to transfer degrees. (Educate affordably; increase completions)</td>
<td>Convene workgroup for 18-month learning period on adult-focused programming in other states; create plan for pilot, expansion.</td>
<td>Finalize and pilot plan for adult-focused programming at one two-year college by Fall 2011; monitor, evaluate, and learn. Expand to two campuses by Spring 2012.</td>
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**2. Common Core Curriculum and Coordinated Approaches to Dual Enrollment, Transfer**

<table>
<thead>
<tr>
<th>Montana Strategy/Tactics</th>
<th>First Year</th>
<th>Subsequent Years</th>
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</thead>
<tbody>
<tr>
<td>Create common related instruction requirements in workforce programs and a streamlined “Regents’ transfer core.” (Increase completions; generate savings; educate affordably)</td>
<td>Design parameters and process for switching to common related instruction; begin identifying requirements. Develop streamlined transfer core, and funding incentives for completion. Seek regental approval by May 2010.</td>
<td>Transition to common related instruction in 6 programs by Fall 2010; add eight additional programs each fall. Introduce Regents’ transfer core at virtual community college and participating colleges Fall 2010. Embed in tech prep, dual enrollment processes by January 2011; four shared articulations by Fall 2011.</td>
</tr>
<tr>
<td>Create statewide protocols for high school-to-college transitions. (Educate affordably; increase completions)</td>
<td>Convene workgroup with K-12 to create a comprehensive approach to transitions with statewide guidelines for dual enrollment and tech prep.</td>
<td>Pilot dual enrollment/tech prep protocol at virtual community college and at least three campuses Fall 2010; monitor, improve, expand to regional “hubs” by Fall 2011.</td>
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**3. Technology Infrastructure for Access, Accountability, and Efficiency**

<table>
<thead>
<tr>
<th>Montana Strategy/Tactics</th>
<th>First Year</th>
<th>Subsequent Years</th>
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<tbody>
<tr>
<td>Create virtual community college. (Generate savings, educate affordably)</td>
<td>Identify participating campuses for pilot; develop processes; develop early college programs.</td>
<td>Pilot virtual community college with Regents’ transfer core and three workforce programs in Fall 2010; implement adult-focused programs by Fall 2011; expand.</td>
</tr>
<tr>
<td>Integrate IT data and management systems. (Generate savings)</td>
<td>Seek broadband and systems funding to improve IT capacity. Bring one college onto Banner. Devise data warehouse codes for new productivity metrics.</td>
<td>Implement improvements in data warehouse Fall 2010. Monitor, identify, and address challenges of bringing new college onto Banner. Seek funding sources for full integration.</td>
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Montana’s policy plan is ambitious, but achievable. Lumina’s investment will help Montana’s efforts succeed by providing access to expertise and the opportunity to see good practice in action elsewhere and bring those practitioners to Montana. In our most significant reform areas – adult engagement, the virtual community college, high school to college transitions, and outcomes-based funding – MOA funding will be crucial for pilot projects before full implementation, professional development and strategic engagement during implementation, and the ongoing consultation and mentorship we found so helpful during the Learning Year.

**Section 4 – Communications and Engagement**

**Goals and Target Audiences**

If the changes proposed in Montana’s policy plan were easy, they would have occurred already. Clearly, strategic communications and engagement are essential to our success. To advance our objectives of increasing two-year enrollments and completions (especially among target demographics), two-year/four-year transfer, and system-wide efficiencies, we must simultaneously pursue the following communications and engagement goals:

- Increase awareness of the need for a more accessible, affordable, efficient two-year sector, particularly among policymakers, business and community leaders, and the media.
- Build support for and ownership of a policy agenda for a more accessible and affordable system of two-year education, focusing on policymakers, institutional leaders (both faculty and administration), and business and community leaders.
- Improve the perception of two-year institutions and programs, particularly among K-12 educators/leaders, students and parents, prospective adult students, the general public, and business/community leaders.
- Build awareness, commitment and momentum for change as new two-year opportunities and programs are created, particularly among K-12 educators/leaders, students/parents, prospective adult students, business/community leaders, and the media.
These goals are rooted in research and inquiry conducted by the Montana University System in partnership with other groups, activities that will continue during implementation. Our findings to date have helped us identify the following challenges to our project goals, as well as deployable assets:

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Assets</th>
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</table>
| Perception among some policymakers and much of the public that two-year programs aren’t “college;” they offer only vocational programs for underprepared students and are a last resort, not a first choice. | • Use opinion research and Learning Year tools (opportunity, student flow analyses) to develop counter messages.  
• Build on partnerships with state and local K-12 leaders to develop a grassroots effort to inform students about two-year options. |
| Perception among policymakers and institutional leaders that the state can’t produce new degrees without new money. | • Use Learning Year tools and implementation results to counter this perception.  
• Deploy a cadre of advocates (state advisory team, workgroups) to carry messages. |
| Opposition/misinformation from individuals and groups believing that they will “lose” resources and/or autonomy through reform. | • Use research to create pieces that combat myths and show potential benefits.  
• Create a “rapid response team” of key leaders to address critics. |
| Skepticism by policymakers and business/community leaders that the two-year agenda may be more talk than action. | • Provide ownership opportunities through workgroups, state advisory team.  
• Leverage media and partner networks to publicize milestones and success stories. |

**Messaging Priorities**

To succeed in our project goals, we must develop, instill, and reinforce certain messages.

- We must convey to educators, students, parents, and the public that:
  - A two-year education opens doors rather than closing them.
  - “Some college” is not enough – **completion is crucial**.

- We must convey to policymakers, opinion leaders, campuses, and the media that Montana can and must get more out of its two-year sector to meet economic and community needs. This means:
  - Providing two-year education at two-year campuses.
  - Creating “completion-focused” paths into and out of two-year programs (dual enrollment, transfer).
  - Using technology to share resources, reduce duplication, and extend programming to every corner of the state.
  - Engaging and retaining adult learners.
  - Paying campuses for results, not just recruitment.
These messages will be advanced through the following strategies and timelines:

<table>
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<tr>
<th>Proposed Communication and Engagement Strategies/Tactics and Timeline</th>
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<tbody>
<tr>
<td><strong>Leadership / Ownership</strong>&lt;br&gt;Create and sustain a coalition to raise awareness of the problem, resolve challenges, and promote solutions.</td>
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<tr>
<td><strong>Short Term (Yr. 1) Building Demand</strong>&lt;br&gt;</td>
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<tr>
<td>• Identify and recruit key leaders for policy workgroups.</td>
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<tr>
<td>• Announce the leadership group (MOA state teams).</td>
</tr>
<tr>
<td>• Establish a two-year agenda as a standing item for interim legislative committee.</td>
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<td>• Conduct first “roll-out” conference on two-year changes.</td>
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<tr>
<td>• Conduct tour of key communities that includes town hall meetings, listening sessions, and school visits.</td>
</tr>
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<td>• Deliver presentations and conduct listening sessions with key groups (education, economic development).</td>
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Section 5 – Capacity to Implement

In the Montana Mini-Case Study, SPEC Associates identified both access and degree completion as core challenges to Montana’s productivity agenda and made the following recommendation:

“To meet the challenges it faces, both in access and degree productivity, Montana will need to examine the way it now delivers higher education, the way that it prepares students for entry into higher education, and how the entire range of public agencies support the productivity agenda (p.4).”

During the learning year, Montana engaged in that examination through the opportunity analysis, student flow analysis, focus groups, surveys, and conferences. The result is the four strategies for improving our productivity described in Section 3 - Policy Plan. We are fully aware that these strategies will significantly change how Montana does business, not just in two-year education, but in various aspects of public education. As we assimilated the levels of support required for this section of the proposal, we were struck by the significant efforts our stakeholders have already initiated to achieve goals congruent with our own.

State Leadership Support. (See Appendix A, Regents’ Resolution; and Appendix B, Letters of Support) State-level partners in this enterprise are solid in their commitment to this initiative, recognizing how well it aligns with their own policy goals. Governor Schweitzer has been promoting two-year education from his first days in office. The goals of our new Superintendent of Public Instruction are strongly connected to our productivity agenda. The Montana Legislature has consistently promoted the coordination of two-year education, distance learning, dual enrollment, system-wide and streamlined transfer, and accountability measures. The Commissioner of Higher Education and the Board of Regents are completely engaged in this project, so much so that they have created a new workgroup to ensure that the academic, organizational and financial policy changes necessary for this proposal become part of a more comprehensive reinvention of the Montana University System.

Institutional Support. (See Appendix C, Letters of Support.) As with any change of this scope and scale, institutional leaders are understandably concerned about the effects on their campuses. They realize, however, that fully utilizing the capacity of our two-year colleges is essential to Montana’s economic and civic vitality. Ongoing individual campus efforts to strengthen two-year offerings have been significant and will form important contributions to the concerted effort described in this proposal. For example, MSU-Great Falls has already implemented performance metrics quite similar to
our MOA metrics. MSU-Billings has been exploring how to address the challenges of engaging adults for the past two years. The University of Montana’s chief information officer has spent countless hours advising the MOA State Team and has specifically designed a program to bring one rural community college into the university system’s common data platform. All Montana’s state and community colleges, including our tribal colleges, have participated in the common course-numbering process funded by the 2007 Legislature.

**Fiscal Support.** Major components of our initiative focus on transferability, online access, dual enrollment, and alignment of workforce programming. The Montana Legislature is committed to those goals as well and has aligned dollars with dreams, including $4 million in the last biennium for transferability and distance education initiatives and $2 million in the current biennium to integrate two-year colleges’ information systems sufficiently to create a virtual community college. Our two-year agenda opens the door to additional external sources of support, including Perkins funds, Workforce Investment Act funds, the American Graduation Initiative, and the College Access and Completion Fund.

**Data Capacity.** All eight of our Montana University System campuses use the same enterprise information system (Banner); they include two “stand-alone” and three “integrated” colleges of technology, as well as two four-year colleges incorporating the two-year college mission. Two of the three community colleges have data systems capturing equivalent information, and the third will be brought onto Banner this year as part of the $2 million legislative allocation for integrated two-year programming. Montana’s Associate Commissioner for Planning, Technology and Communication has created a core team that is now being expanded to support data analysis for the project and to address any deficiencies that occur. The team will include institutional research and planning professionals at the Office of the Commissioner of Higher Education (OCHE) and two-year and four-year institutions with extensive expertise in collecting, analyzing, and interpreting data. As a result of the extraordinary level of analysis that produced the Goals, Objectives, and Metrics presented in Section 2, we are confident that we have the necessary data capacity.

**Team Capacity.** (See Appendices E-1, State Teams, Workgroups, and Taskforces; and E-2, Engagement of State Staff and Teams.) To keep stakeholders within and beyond the Montana University System engaged during implementation, we will make use of two state teams. The first is a State Advisory Team comprised of representatives from the governor’s staff, legislature, Office of Public Instruction, OCHE, higher education, K-12, and business and industry. This group will provide general oversight for the project and provide liaison and advocacy within their constituency groups.
The presidents of our flagship universities will serve *ex officio*, as will three members of the State Implementation Team (described below) to ensure institutional engagement. Most members of the Advisory Team have been actively engaged members of the original MOA State Team; representatives of business and industry, and a legislator have been added to ensure a range of perspectives and experience.

The second group is the State Implementation Team, comprised of a senior-level administrator from each of the Montana University System-affiliated two-year degree providers, a tribal college president and the state director of distance learning initiatives. Members of this team will direct the work on their campuses and coordinate efforts at the state level to meet project objectives. Workgroups and taskforces with appropriate representation from stakeholder groups have been created to develop and implement specific tactics related to our goals. The Deputy Commissioner for Two-Year Education will continue to direct the project, and a full-time project coordinator will be retained to ensure day-to-day management, communication, and coordination.

**Operational Plan.** The deliverables, timeline, and staffing for Montana’s initiative have been presented throughout this proposal in the sections devoted to the State Policy Plan, the Strategic Communications and Engagement Plan, and the budget. The budget includes resources for outside evaluation and communications contracts, project coordination, and sufficient travel and meeting funds to permit ongoing learning and knowledge-sharing with policy leaders and experts in other states. For ease of reference, more specific details of each section have been compiled in a unified Operational Plan (Appendix F).

**Section 6 – Montana Budget Narrative**

Montana requests a total of $1,998,700 over four years to support and stimulate its two-year agenda. While this is a significant investment, it is important to note that the state brings $2.7 million in appropriated funds and in-kind materials and services to this work, which we believe is a strong sign of our commitment to this agenda. The Lumina investment will be allocated as follows.

- Approximately 70 percent of the grant budget will support work on our four major strategies, specifically:
  - Personnel, consultants, and travel and meeting costs for two state teams, five strategy workgroups and three tactical task forces to develop the reforms and accomplish the necessary changes in laws, regulations, policies and practices;
Designing, piloting, and gradually expanding major projects in information system integration, the virtual community college, dual enrollment, adult-focused programming, and outcomes-based funding;

Professional development during the implementation phases of IT systems integration and high school/college transitions, as well as ongoing professional development and awareness-raising through annual “roll-out” conferences on best practices and reforms in the works; and

Shared leadership, with the Office of Public Instruction (OPI) taking the lead on the adult basic education taskforce; the Governor’s Office of Economic Opportunity leading the workforce responsiveness taskforce; the OCHE and OPI co-leading the high school/college transitions activities; and, through subcontracts, the campuses or groups of campuses co-leading the virtual community college, the Banner integration, and adult-friendly pilot projects.

- Twenty percent of the budget will support communication and engagement efforts to help lay the groundwork for policy change, build support for the agenda, improve public perception of the two-year option, and raise awareness of the reforms achieved. Detailed communication activities are described in the communication plan and the budget form and justification.

- Almost five percent of grant funds will be used for evaluation, including establishing the baseline, documenting processes and progress, and measuring outcomes based on the project goals.

- Approximately five percent will fund general administration of the grant.

Appendices G1 (Budget Form / Supporting Data) and G-2 (Budget Justification) provide additional information regarding our request.

Section 7 – Why Montana?

Montana’s proposal could not be more timely. In January 2009, President Obama declared the same education goal that all the MOA states have embraced in the past year: higher educational attainment for all Americans. In July, the President proposed a 10-year, $12 billion investment in community colleges as a catalyst for achieving that goal. Because Montana’s singular focus is on two-year education as the catalyst for achieving the MOA goals so congruent with the President’s, our work is especially promising in terms of potential impact.
Montana will develop/adapt and test strategies to address problems common to two-year colleges nationwide: how to engage non-traditional students; how to promote transfer and completion; how to ensure statewide access to high-quality, low-cost dual enrollment programs; and how to measure and improve cost-effectiveness in a complex governance and structural environment. At the system level, we will take an innovative approach to our multi-tiered two-year/four-year structure, one that many states share. Recognizing the efficiencies of interconnection and the importance of collaboration, we have consciously chosen not to separate our two-year colleges from the university system. Instead, we are creating the technological infrastructure, coordinated programming, and performance metrics that will not only build on existing efficiencies, but also improve access, completion, transfer, and accountability.

Montana understands the challenges of “being small.” We also understand the advantages: on urgent matters, we join forces, roll up our sleeves, and get things done. In the past year, we’ve done just that. We’ve engaged key groups in Learning Year activities; brought together all two-year colleges, including tribal colleges, for a first-ever exploration of shared interests; deepened partnerships; and garnered the political support to secure legislative funding for the two-year agenda. Montana understands how important it is to leverage the capacity of our two-year colleges. We will get the job done.
Appendix A:
Montana’s Board of Regents’ Resolutions on the Two-Year Education Initiative

Resolution #1
On May 29, 2009, in response to the agenda item dedicated to “Making Opportunity Affordable: Report on the Policy Framework for Two-Year Education in Montana,” the Montana Board of Regents of Higher Education unanimously adopted the following resolution:

WHEREAS a fully productive two-year college system is crucial to our strategic planning goals of increased educational attainment, a vibrant economy, and institutional efficiency and effectiveness;

THEREFORE, we, the Montana Board of Regents of Higher Education, authorize the Deputy Commissioner for Two-Year Education immediately to pursue, through consultation and collaboration with the appropriate stakeholders, including the Office of Public Instruction, the following strategies to advance the Montana’s two-year education productivity agenda:
1. Bringing the full two-year mission to all two-year colleges and charging them to serve as regional hubs for workforce development, dual credit, and adult access;
2. Coordinating approaches to dual credit, transfer, program alignment, and adult access; and
3. Developing an integrated information system to facilitate access, coordination, resource-sharing, and efficiency

Resolution #2
On August 26, 2009, in response to the further refinement of MOA strategies connected to the submission of the Making Opportunity Affordable Implementation Grant, the Board of Regents of Higher Education unanimously adopted the following resolution:

The Montana Board of Regents resolves to continue to pursue the goals and strategies developed during the Making Opportunity Affordable “learning year” to increase enrollments, completions, and successful job placement/transfer through affordable, efficient approaches to two-year education in Montana. We endorse with particular enthusiasm the following strategies:
2. Develop approaches to programming, services, and tuition/fees specifically targeted to increasing adults’ enrollment in two-year education and completion of two-year degrees.

3. Develop a certificate of completion for the “two-year college transfer core” to facilitate student transfer and reward the completion of a quality-assured credential.

4. Establish common related instruction requirements in programs leading to the same career to ensure equity of access and adequacy of preparation.

5. Designate two-year colleges (along with MSU-Northern, UM-Western, and participating tribal colleges) as regional “hubs” for partnerships supporting high school-college transitions and workforce development.

6. In collaboration with the Office of Public Instruction, develop a statewide protocol for dual enrollment and other high school-to-college transitions.

7. Create a virtual community college offered on a consortium basis, featuring the “two-year college transfer core,” dual enrollment opportunities, and programming of participating two-year colleges.

8. Coordinate/integrate data systems and improve network connectivity to support data analysis and resource-sharing.

9. Implement outcomes-based funding strategies.
Appendix B:

Letters of Support from Montana’s State Leaders

Governor Brian Schweitzer
Senator Bob Hawks
Representative Wanda Grinde
Representative Bob Lake
Superintendent of Public Instruction Denise Juneau
September 4, 2009

Dr. Sheila M. Stearns, Commissioner
Office of the Commissioner of Higher Education
2500 Broadway
Helena, MT  59620

Dear Commissioner Stearns:

I am pleased to support Montana’s proposal for an implementation grant through the Lumina Foundation’s Making Opportunity Affordable initiative.

Two-year colleges provide convenient access for students of all ages and circumstances and they’re more affordable for students and the state. My administration has advocated for greater utilization of our two-year colleges since my first days in office.

Institutions of higher education must take advantage of 21st century learning technologies, especially distance learning, to expand access and create efficiencies that address affordability issues. I was pleased to join the legislature in supporting the allocation of $2 million for the development of the single, web-based portal to early college programs that is described in the proposal as the “virtual community college.”

I appreciate the emphasis on P-20 collaboration evident in the proposal. I continue to promote dual enrollment opportunities and full collaboration between K-12 sector and the higher education sector to ensure Montana’s high school students are eager and ready to go on to college.

As you know, two of my administrative staff have been active in the Making Opportunity Affordable initiative throughout the learning year. They attended both academies, participated in the Opportunity Analysis, attended all major activities, coordinated several focus groups and interacted with the Project Director on an ongoing basis. I commit to continuing that level of engagement throughout the implementation years.

In conclusion, I believe this proposal advances my goal to make higher education more efficient, more resourceful, more accountable and more productive and I commend your effort to secure this important grant.

Sincerely,

BRIAN SCHWEITZER
Governor
September 4, 2009

Dr. Sheila M. Stearns, Commissioner
Office of the Commissioner of Higher Education
2500 Broadway
Helena, MT  59620

Dear Commissioner Stearns:

As the legislative member of the MOA State Team, I support this proposal for the Making Opportunity Affordable Implementation Grant in Montana. I have attended both the June 2008 and June 2009 MOA Academies and have been a benefactor of the many candid and enlightened discussions centering on America’s need for greater productivity in our educational sector. I believe Montana is in great need of assistance in achieving this end.

Montana’s MOA initiative targets the greater utilization of Montana’s two-year colleges as the way to advance Montana’s productivity agenda. This orientation generally matches conclusions of university listening groups and the Montana legislature on both sides of the aisle. In 2005 and 2007, the legislature targeted over $45 million in new one-time funding to improve facilities and equipment in Montana’s two-year colleges. In the past two biennia, it has allocated ongoing funding to implement common course-numbering and to integrate and expand distance education. We have changed the funding formula to these campuses to a more realistic base of fixed and variable costs. All of these legislative priorities are coordinated with Montana’s proposal for this implementation grant meant to help set the agenda for coming state initiatives.

I have been especially interested in shared goals backed by metrics and data that will assist campuses and the legislature in understanding student and institutional performance. I applaud the use of baseline data and projections as part of this grant proposal. Better management of the system will be a significant by-product of using this set of tools.

Our MOA State Team has been effectively engaged in helping us understand the educational challenges and opportunities facing Montana. We believe that our proposal is an ambitious, but attainable vision for mitigating the challenges and seizing upon the opportunities.

Sincerely,

Robert L. (Bob) Hawks
Member, Education and Local Government Interim Committee
Member, Joint Appropriations Subcommittee - Education
Member, Senate Finance and Claims
Past Member, Postsecondary Education Planning and Budget Interim Committee
Making Opportunity Affordable State Team Member
September 3, 2009

Dr. Sheila M. Stearns, Commissioner
Office of the Commissioner of Higher Education
2500 Broadway P.O. Box 203201
Helena, MT 59620

Dear Commissioner Stearns:

It is a pleasure to provide this letter of support for the Making Opportunity Affordable (MOA) implementation grant proposal from Montana.

President Obama has called our attention to the competitive edge the United States must regain with respect to the percentage of our citizens with college degrees. The goals of Montana’s MOA implementation grant proposal are designed to address that challenge. Like President Obama, Montana is focusing its efforts on increasing enrollments, degree completions, successful transfers, and efficiencies in Montana’s two-year colleges. They are the best vehicle for Making Opportunity Affordable in Montana.

In recent years, the Montana legislature has made significant strides in promoting our two-year colleges. We have dedicated funding to the updating of two-year colleges’ facilities and equipment, smoother transfer processes, and better coordination of dual enrollment and distance learning. The virtual community college and dual enrollment strategies incorporated in the proposal will expand access to two-year programs throughout the state, especially among our rural high schools, where opportunities are often quite limited. I am especially pleased to see the grant’s emphasis on collaboration between K-12 and higher education, not only on the MOA State Team, but on the key workgroups that will ultimately be responsible for implementation of the proposal.

As chair of the Interim Education and Local Government Committee, I highly recommend the awarding of the Making Opportunity Affordable implementation grant to Montana so we can continue the work we’ve begun to improve access, affordability and efficiency of our state’s colleges.

Sincerely,

Representative Wanda Grinde
Chair, Legislative Interim Committee on Education and Local Government
Chair, House Education Committee of the 2009 Legislature
September 4, 2009

Dr. Sheila M. Stearns, Commissioner
Office of the Commissioner of Higher Education
2500 Broadway
Helena, MT  59620

Dear Commissioner Stearns:

I am pleased to provide this letter of support for the Making Opportunity Affordable implementation grant proposal from Montana. During my 8 years as a legislator, I have served in leadership positions on several education-related committees, and this proposal addresses several of the issues of concern to the legislature and the people of Montana.

Montana has not made effective use of our two-year colleges. Nationally, 46% of all college students are enrolled in two-year colleges. In spite of the lower tuition, Montana only has 24% of our college students enroll in our two-year colleges. Less than 1% of all students receiving a bachelor's degree in Montana have transferred from a Montana two-year college. Because we are not using our two-year colleges effectively, controlling the cost per degree for students and the MUS is difficult to manage.

The Montana legislature has shown a sustained interest in issues that are addressed by the strategies in this grant proposal. We must have more dual enrollment opportunities for high school students. Transfer between two-year and four-year colleges needs to be as clear and seamless as possible. Coordination of distance learning must allow citizens of Montana the access to affordable higher education opportunities. We need the efficiencies and cost-savings of a more integrated, collaborative system. The strategies in this grant proposal move the state forward in each of these areas.

As state legislatures throughout the nation struggle to fund higher education and as students struggle to finance their own education, we must find ways to make higher education more affordable. I support this grant's efforts to achieve that goal.

Sincerely,
September 8, 2009

Dr. Sheila M. Stearns, Commissioner
Office of the Commissioner of Higher Education
2500 Broadway
Helena, MT 59620

Dear Commissioner Stearns:

I am pleased to submit this letter of support for Montana’s proposal for the Making Opportunity Affordable Implementation Grant. Montana’s schools strive to provide a quality education to all students. And they prove themselves year after year through high scores on state and national assessments. The Office of Public Instruction is very proud of Montana schools and we stand ready to provide the vision, advocacy, support, and leadership for schools and communities to ensure that all students meet today’s challenges and tomorrow’s opportunities.

Since I assumed office in January, 2009, the productive collaboration between my office and yours has been one of my priorities. Montana’s MOA Implementation Grant proposal, if successful, will advance that collaboration significantly in ways that will serve all Montana students well. Our work to define and address the issue of transition to the college level will greatly improve education opportunities for students throughout our state.

This month, the Montana Board of Regents formally resolved to pursue nine strategies during the MOA implementation years to increase enrollments, degree completion, successful transfer, and cost-effectiveness in Montana’s two-year colleges. The strategies as a whole are comprehensive and far-reaching, but I support in particular the strategies related to students’ transition from high school to college. By clarifying “readiness” for workforce programs, improving transfer advising, and establishing consistent dual enrollment protocols across the state, the implementation years will help high school students prepare for, engage in, and most importantly, succeed in their postsecondary studies.

I am particularly appreciative of the emphasis in the grant proposal on continued collaboration between the Office of Public Instruction (OPI) and the Office of the Commissioner of Higher Education (OCHE). Including K-12 professionals in the work we share, and drawing on the expertise of the K-12 sector to provide leadership will create buy-in and ownership in Montana’s MOA efforts during the implementation years.
I attended the MOA Policy Leaders Forum in Denver earlier this summer and was impressed with the commitment to improving our nation’s educational attainment levels, and especially with the respect for the role K-12 educators play in achieving that goal. I am pleased to see that commitment and respect reflected in Montana’s proposal.

Sincerely,

[Signature]

Denise Juneau
Montana Superintendent of Public Instruction
Appendix C:

Letters of Support from Montana’s Higher Education Institutions

President George Dennison, The University of Montana
President Geoffrey Gamble, Montana State University
President Joe McDonald, Salish-Kootenai College
President Jim Cargill, Dawson Community College
4 September 2009

Dr. Sheila M. Stearns  
Office of the Commissioner of Higher Education  
2500 Broadway  
Helena, Montana 59601

Dear Commissioner Stearns,

On behalf of The University of Montana, I write to express enthusiastic support for the Making Opportunity Affordable (MOA) application submitted by the Montana University System. University representatives have participated in the project from its inception and have dedicated significant time and energy to it. Specifically, the Provost and Vice President for Academic Affairs, Dean of the College of Technology, and Chief Information and Technology Officer have taken active roles in the planning, discussions, and decisions throughout the development of the grant proposal. They have kept me well informed, and I strongly support the project because of its potential benefit to the State and people of Montana.

I began my college career with a two-year institution in Montana and then transferred to the then Montana State University, now The University of Montana. Because of my own experience, I appreciate the importance of the two-year institutions to Montana’s higher education system. The State has a variety of two-year providers, including three Community Colleges with local governing boards; seven Tribal Colleges chartered by the federal government and governed by Tribal boards; two separately accredited Colleges of Technology governed by the Montana Board of Regents; two “embedded” Colleges of Technology merged with senior colleges about fifteen years ago; and other two-year programs within four-year campuses. The opportunity for greater coordination of offerings and improved effectiveness will produce vitally important benefits to the State, its citizens, generally, and, ultimately, the students. As the proposal demonstrates, students and communities have underutilized the two-year institutional providers. With a more concerted effort, built around the goals and objectives of this proposal, the State will increase the percentage of its population with degrees of some kind, a parameter vitally important to national and State competitiveness.

I want to emphasize especially our support for the use of technology to reach more students and to provide the foundation for an efficient and effective two-year consortium of providers transparent to the users of the services. As one of the most rural states in the nation, Montana needs to provide educational opportunities close-to-home and in a manner convenient for students who cannot and should not have to bear the additional cost and disruption of moving to a community with a local campus. Making this kind of change alone will go far toward widening access for deserving Montanans.
The University of Montana hosts one of the merged or embedded Colleges of Technology, actually the largest of the Colleges of Technology, and – taking account of on-line learning – the fastest growing segment of the University’s student population. As a result, more students every year have the opportunity to improve themselves through one of the programs offered by the College of Technology, either on campus or on-line. In my view, the Montana University System MOA proposal, if funded, will empower and enable the other two-year providers in Montana to extend similar opportunities all across the State by combining and sharing resources, programs, and people. For example, the new consortium will allow expanded interaction among the Community Colleges, Tribal Colleges, Colleges of Technology, and the four-year campuses. In addition, it will facilitate the development of the recently established Bitterroot Valley College Program hosted by The University of Montana to serve the educational needs of place-bound students in that geographic region to the south of Missoula.

I personally commit my strong support for the MOA project and pledge that The University of Montana will participate energetically and enthusiastically.

Sincerely,

George M. Dennison
President

GMD/cc
Denle4015

c: R. Engstrom, Provost and Vice President for Academic Affairs
   B. Good, Dean, College of Technology
   R. Ford, Chief Information Technology Officer
September 2, 2009

Dr. Sheila Stearns, Commissioner  
OCHE  
P O Box 203101  
Helena MT 59620-3101

Dear Sheila:

This is a letter of support for the Making Opportunity Affordable grant proposal being submitted by the Montana University System.

A significant amount of work has already been invested in our statewide efforts to increase the coordination and utilization of two-year programs in Montana. Efforts have targeted increasing the number of high school students who participate in early college activities leading to college credit. Montana ranks low regionally and nationally in the number of high school student enrolled in credit-bearing college activities, with only 2.3% of 15-17 year olds enrolled, compared to 7.3% nationally. In addition, only 55% of Montana high school graduates proceed into the Montana University System after graduation. Clearly students who take advantage of early college activities are more likely to proceed to college, are better prepared for their college level studies, and can reduce the cost of higher education and the time to degree.

Montana ranks second-to-last in the region in the percentage of higher education students enrolled in two-year colleges. The regional average is 44%; Montana’s two-year education students are only 21% of the total. Because the average family income is so low, the burden of the costs of attending college is a significant challenge. Having access to college courses from the home community is a key way to mitigate that challenge, whether it be offerings held on a campus or delivered through a distance mechanism. The Montana MOA efforts have focused on leveraging technology to ensure the best quality of instruction is available without the constraints of traditional place-bound courses.

MOA efforts have also focused on increasing the number of adults participating in and earning a post-secondary credential or degree. As the fourth largest state in the nation, with a population under one million, residents of Montana’s rural communities face a double access challenge—distance to a college campus, as well as affordability of tuition and other costs. Montana ranks last in the west and near last in the nation for the number of adults in higher education. Improving the offerings of our two-year campuses will increase our ability to meet our learners’ needs, as well as our communities’ needs.

The Montana University System has made significant progress in addressing our two-year college needs, thanks to the initial MOA grant. I strongly support the submitted proposal for additional grant funding, in the interests of our future students and their career aspirations, and in the interests of our workforce needs and the economic vitality of our entire state.

Sincerely,

Geoffrey Gamble  
President
September 4, 2009

Dr. Sheila M. Stearns, Commissioner
Office of the Commissioner of Higher Education
2500 Broadway
Helena, MT 59620

Dear Commissioner Stearns:

As the tribal college representative on the Making Opportunity Affordable State Leadership Team, I provide this letter of support for the Making Opportunity Affordable implementation grant proposal from Montana.

Although not part of the Montana University System, Montana’s tribal colleges play an important role in higher education in Montana. On each of Montana’s seven reservations, where poverty and educational attainment are even greater challenges than they are in other areas of Montana, our tribal colleges provide help our tribal people gain access to the opportunities that can change lives. Increasingly, our tribal colleges are also serving non-beneficiary (non-tribal) students who live on or near our reservations.

The MOA goals of producing more college degrees and taking advantage of opportunities to share resources are especially important for our tribal colleges. Montana’s MOA focus on increasing two-year college enrollments, degree production, and successful transfer also apply directly to Montana’s tribal colleges. Therefore, I support the direction Montana’s MOA proposal is taking, and I appreciate the modifications that have been made in the regents’ 9 strategies and the grant proposal itself to ensure that Montana’s goals and strategies include the tribal colleges when appropriate, and that funding for tribal college participation in the implementation plan is included in the grant proposal.

Sincerely,

Joe McDonald, President
Salish Kootenai College

Salish Kootenai College is accredited by the Northwest Commission on Colleges and Universities.
September 4, 2009

Dr. Sheila M. Stearns, Commissioner  
Office of the Commissioner of Higher Education  
2500 Broadway  
Helena, MT 59620

Dear Commissioner Stearns:

I am happy to submit this letter of support for the Making Opportunity Affordable implementation grant proposal from Montana. Montana’s focus on two-year education to leverage higher educational attainment levels, more affordable tuition for students, and greater cost-savings to taxpayers is appropriate and timely.

Montana’s community colleges will always be concerned about state-level initiatives that may affect their ability to serve their local communities. Although Dawson Community College does have minor concerns about the regents’ strategy for common related instruction requirements, we support the direction the MOA proposal is taking and look forward to fine-tuning and implementing the strategies cited in the regents’ August 26 resolution.

Dawson Community College is especially supportive of the MOA initiative to integrate our college’s information system with the system used in the Montana University System. As a rural college, we believe that this integration will provide greater access to more students, better support for all students, and more opportunities for sharing of academic programs and human resources than would otherwise be possible.

Sincerely,

Jim Cargill  
President  
Dawson Community College
### Appendix D-1: Student Flow Analysis

#### NCHEMS Student Flow Model - MONTANA

<table>
<thead>
<tr>
<th>Year</th>
<th>Annual Enrollment Increase</th>
<th>Increase in Certificates and Degrees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Public Two-Year</td>
<td>Public Bachelors and Masters</td>
</tr>
<tr>
<td>2009</td>
<td>63</td>
<td>165</td>
</tr>
<tr>
<td>2010</td>
<td>129</td>
<td>306</td>
</tr>
<tr>
<td>2011</td>
<td>137</td>
<td>192</td>
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<tr>
<td>2012</td>
<td>221</td>
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<td>812</td>
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<td>2015</td>
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<td>2016</td>
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<td>3,312</td>
</tr>
<tr>
<td>2025</td>
<td>2,427</td>
<td>3,495</td>
</tr>
<tr>
<td><strong>Cumulative Total</strong></td>
<td>707</td>
<td>5,075</td>
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</table>

**Analysis:** To be globally competitive by 2025, Montana must award 24,500 more degrees than it is currently projected to produce. This increase in degree production will grow the percentage of young, educated adults (25-34 yr. olds) in Montana from 35% currently to 55% by 2025. With key strategies implemented through Montana's MOA efforts, Montana is poised to achieve this target.
### Montana’s Productivity Measures

**Montana’s MOA Productivity Measures**

**MT Two-Year Education**  
*source: IPEDS*

<table>
<thead>
<tr>
<th>1) Completions per 100 FTE Students</th>
<th>Degrees per 100 FTE</th>
<th>16.9</th>
<th>Completions per 100 FTE</th>
<th>21.2</th>
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<tr>
<th>2) Total Enrollment by Race, by Family Income (Pell)</th>
<th>% Minority</th>
<th>8%</th>
<th>% Receiving Pell</th>
<th>29%</th>
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<tr>
<th>3) Revenues per FTE by institution/sector and source</th>
<th>Total Revenue per FTE</th>
<th>$15,507</th>
<th>Current Unrestricted Revenue (state/local/tuition) per FTE</th>
<th>$10,035</th>
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<th>4) Spending per FTE</th>
<th>Education &amp; Related Spending (E&amp;R) per FTE</th>
<th>$10,591</th>
<th>Education &amp; General (E&amp;G) per FTE</th>
<th>$12,684</th>
<th>Total Operating Expenses per FTE</th>
<th>$14,473</th>
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<tr>
<th>5) Spending within E&amp;R</th>
<th>Instruction Portion of E&amp;R</th>
<th>46%</th>
<th>Administration Portion of E&amp;R</th>
<th>16%</th>
<th>Student Services Portion of E&amp;R</th>
<th>14%</th>
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<th>6) Student Share and State Subsidy Share of Costs</th>
<th>Student Share</th>
<th>33%</th>
<th>State/Local Share</th>
<th>67%</th>
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<th>7) Tuition Spending Comparison</th>
<th>Actual Difference between 2004 and 2008 Tuition &amp; Fee Levels</th>
<th>729</th>
<th>Estimated Difference between 2004 and 2008 Tuition &amp; Fee Levels (based on 2004 to 2008 actual growth in E&amp;G)</th>
<th>997</th>
<th>Ratio, Estimated to Actual</th>
<th>137%</th>
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<tr>
<th>8) E&amp;R Spending per Completion</th>
<th>E&amp;R Spending per Degree</th>
<th>$62,543</th>
<th>E&amp;R Spending per Completion</th>
<th>$49,956</th>
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Appendix E-1:

State Teams, Workgroups, and Taskforce

State Team Composition

During the Implementation Years, Montana will have two state teams:

- The **MOA State Advisory Team** will be comprised of key leaders in government, education, business/industry, and two-year education who can affect decision-making among their constituencies. They will meet twice a year face-to-face and receive monthly updates on the progress of Montana's MOA Initiative. A summary of their past engagement with the learning activities of the MOA Learning Year is provided in Appendix E-2.

- The **MOA State Implementation Team** will be comprised of the campus officials needed to lead change on their own campuses and coordinate changes statewide. Implementation Team members will serve on at least one of the implementation workgroups and will meet monthly, primarily by teleconference. Three of the Implementation Team members will also serve as ex officio members of the State Advisory Team, rotating that representation so that a variety of Implementation Team members have the opportunity to interact with the Advisory Team.

MOA State Advisory Team

Sheila Stearns, Commissioner of Higher Education *
Dan Villa, Education Policy Advisor to Governor Schweitzer *
Pat Wise, Governor's Office of Economic Opportunity *
Joyce Silverthorne, P-20 Advisor to the Superintendent of Public Instruction *
Senator Bob Hawks (D) *
Representative Bob Lake (R)
Regent Clay Christian *
Regent Lynn Hamilton *
Royce Engstrom, UM Provost *
Joe McDonald, President, Salish Kootenai College *
Jan Wagner, Trustee, Miles Community College *
Dick Brown, Executive Director, Montana Hospital Association
Bob Nystuen, President, First Glacier Bank
Tim Bronk, Darby Superintendent of Schools *
George Dennison, President, University of Montana ex officio
Geoffrey Gamble, President, Montana State University, ex officio
Three members of Implementation Team on rotating basis, ex officio
Mary Sheehy Moe, Deputy Commissioner for Two-Year Education / MOA Project Director *

*member of MOA State Team during Learning Year
MOA State Implementation Team
  Daniel Bingham, Dean/CEO, UM-Helena College of Technology
  Jim Cargill, President, Dawson Community College
  John Cech, Dean, MSU-Billings College of Technology *
  John Garic, Dean, Montana Tech College of Technology
  Tom Gibson, Director of Distance Initiatives, Office of the Commissioner of Higher Education
  Barry Good, Dean, UM-Missoula College of Technology
  Rolf Groseth, Vice-President for Inter-Campus Affairs, Montana State University
  Stefani Hicswa, President, Miles Community College
  Jane Karas, President, Flathead Valley Community College *
  Richard Littlebear, President, Chief Dull Knife College
  Anneliese Ripley, Director of Outreach, UM-Western
  Joe Schaffer, MSU-Great Falls College of Technology *
  Frank Trocki, Chancellor, MSU-Northern
  Mary Sheehy Moe, Deputy Commissioner for Two-Year Education, MOA Project Director *

Workgroups

Purpose. Each workgroup will be charged with the development of a work plan related to a strategic goal of the MOA initiative (focusing on Year 1), as well as with oversight of implementation and evaluation of the work plan (focusing on Years 2-4).

Selection of Members. Each workgroup will have at least one member of the State Implementation Team and may include other state team members as well. Members will be proposed by the State Implementation Team and approved by the MOA State Advisory Team.

Timelines and Deliverables. The MOA Project Director and the workgroup chairs, after review of the operational plan, will establish the timelines and deliverables for each workgroup and communicate them to workgroup members and the state team.

Descriptions

Strategy #1
Bring the full two-year college mission to all two-year colleges and establish them as regional hubs for adult access, high school/college transitions, and workforce development.

- The Two-Year Mission / “Hubs” Workgroup (Strategy #1), chaired by Project Director Mary Moe, will be a subset of the MOA State Implementation Team charged with the activities associated with the strategic goal of bringing the two-year mission to all two-year program
providers in Montana functioning as regional hubs for high-access, low-cost higher education opportunities. The workgroup will address the challenges involved in: (1) transitioning developmental course work to the two-year level at all campuses; (2) bringing adult basic education programs and services to all tribal colleges and colleges of technology; and (3) bringing the transfer mission to the embedded colleges of technology.

During the first years of implementation, the workgroup will identify the policy changes and fiscal impacts of changes in all three mission areas and make recommendations in each area to the State Advisory Team. In subsequent years, this workgroup will coordinate and evaluate implementation on the campuses.

Because some of these mission areas require broader representation, communication, and collaboration and/or are major strategic initiatives, members of the workgroup will chair, co-chair, or serve on one of the following task forces:

- **Adult Access Task Force** will be chaired by a two-year college dean or CEO and another state team member (both to be named) and will be charged with developing a workplan for reinventing two-year programs and services to engage adults in completing postsecondary credentials. Members will represent two-year college faculty and administrators, Montana job service/workforce centers, apprenticeship programs, and business/industry. As a major initiative of the implementation grant, this group will engage with consultants extensively in the first two years to develop adult-focused programming, making policy recommendations as needed to the Board of Regents by February 2011; pilot the programming on one campus in Year 3 and expand to two additional campuses in Year 4.

- **Adult Basic Education Task Force**. The Office of Public Instruction’s Adult Basic Literacy Education (ABLE) Director, Margaret Bowles, will convene ABLE directors from throughout the state and leaders from campuses without ABLE to identify the options for bringing adult basic education to all two-year campuses and make the policy/statutory recommendations needed to bring make that programming available at all campuses.

- **Workforce Responsiveness Task Force** will be co-chaired by Pat Wise of the Governor’s Office of Economic Opportunity and a state team member to be named. The subcommittee will develop statewide protocols to ensure access, utilization, and evaluation in workforce training and education responding to local needs. The members
will include outreach directors of the various two-year and four-year campuses and an equal number of business/industry representatives, including economic development/chamber leaders. Also included will be a Department of Labor and Industry designee and an OPI workforce division designee.

**Strategy #2**
Create common curriculum and coordinated approaches to facilitate high school/college transitions and two-year to four-year transfer.

- **The High School/College Transitions Workgroup** will be co-chaired by the Office of Public Instruction’s P-20 Advisor Joyce Silverthorne and MOA Project Director Mary Moe. The charge will be to develop statewide protocols for the full range of programs and services offered through partnerships at each hub to help high school students prepare for and begin to transition into college: core curriculum, Advanced Placement, Big Sky Pathways, running start, early college, etc. The core values are to ensure access, utilization, equity, and evaluation statewide without interfering with locally crafted approaches that do not relate to those goals. Additionally, the workgroup will liaison with other campus and state-level initiatives focusing on aspects of these transitions that go beyond the two-year college initiative.

The subcommittee will have approximately 16 members, including but not limited to school district administrators, two-year college leaders, a representative of Montana Tech, a Big Sky Pathways representative, a business/industry representative, and a representative of the Board of Public Education. The Subcommittee will also rely on specialists at OCHE and OPI with specific expertise/responsibilities in these areas.

- **Curriculum Coordination and Alignment Workgroup** will be co-chaired by Deputy Commissioner for Academic and Student Affairs Sylvia Moore and Deputy Commissioner for Two-Year Education/Project Director Mary Moe and will be charged with (1) creating a statewide alignment of related instruction/general education requirements in programs leading to the same career and (2) identifying the set of courses that will comprise the program of study culminating in the certificate of completion for the Regents’ Transfer Core, which will in turn be used as the basis for shared articulations in high-demand majors and as an advising and quality-assurance tool for two-year college students.
Core members of the workgroup will be the chief academic officers of Montana’s two-year colleges, including tribal colleges. The first prong of the charge will involve extensive interaction with two-year program directors and faculty, as well as business and industry representatives. The second prong of the charge will involve a similar level of interaction with the Regents’ General Education Council and four-year chief academic officers.

**Strategy #3**  
Develop technology infrastructure to expand access, demonstrate quality, and create efficiencies.

- **The Technology for Efficiency Workgroup** will be chaired by Associate Commissioner for Planning, Technology and Communication Tyler Trevor. Members will include two-year college deans/CEOs, as well as designees with technical expertise from several campuses in the Montana University System. The workgroup will be charged with developing a workplan for integrating information systems with the goals of optimal access, optimal cost-effectiveness, and optimal efficiency for the affiliated campuses of the Montana University System, with the appropriate flexibility for individual campuses. First tasks will be (1) bringing Dawson Community College into the Banner information system and (2) streamlining data codes in the data warehouse to improve data access and analysis in general and to introduce specific applications needed for the MOA project goals and metrics.

- **The Virtual Community College Workgroup**, will be co-chaired by Associate Commissioner Trevor and a two-year college leader to be named. The workgroup will be charged with the development of protocols, processes, and programs for a single, web-based portal to two-year programs, beginning with the five early college programs, as required by the 2009 Legislature. In addition to Trevor, the workgroup will consist of the deans/CEOs of all two-year colleges participating in the virtual community college, the CEO or designee of the four-year site primarily responsible for hosting the college, a designee of the virtual academy board of trustees; Dan Villa, Education Policy Advisor to the Governor; Tom Gibson, Director of Distance-Delivered Education; and Mary Moe, Deputy Commissioner for Two-Year Education.
Strategy #4
Implement outcomes-based funding.

- **The Outcomes-Based Funding Workgroup**, charged with exploring funding models that reward completion, with sensitivity to differences at the two-year and four-year levels, has already been created by the Montana Board of Regents. Chaired by Deputy Commissioner for Administration and Budget Mick Robinson, the chief fiscal officer of the campuses affiliated with the Montana University System have begun their work and will consult with Deputy Commissioner/Project Director Moe and the State Implementation Team on appropriate outcomes for two-year colleges.
Appendix E-2:
State Teams’ Engagement with MOA in the Learning Year

MOA Project Staff

Project Director. Dr. Mary Sheehy Moe, Deputy Commissioner for Two-Year Education, led the MOA project during the Learning Year and will continue in that capacity. She has 19 years of experience in Montana’s two-year colleges, the last 10 of which have been in administration. Approximately 35% of her time will be dedicated to project direction.

Project Coordinator. A professional position, funded by the grant, will be created to staff the workgroups and taskforces, organize meetings and conferences, and perform administrative, communication, fiscal management, organizational, and coordinating duties. The coordinator will report to the Project Director.

Other Key Staff. As indicated in the budget detail provided in Appendix G-1, the Commissioner of Higher Education, the Deputy Commissioner for Administration and Finance, and the Associate Commissioner for Planning, Technology, and Communication will dedicate time to ensure the success of the implementation grant. The Commissioner has served and will continue to serve on the MOA State Team. The Deputy Commissioner will lead the work related to Strategy 4, Outcomes-Based Funding. The Associate Commissioner will lead the work related to Strategy 3, Technology Infrastructures for Access and Efficiency. The Executive Assistant to the Deputy Commissioner for Two-Year Education will dedicate significant time to support the Project Director and the Project Coordinator. In addition, the presidents of the two “flagship” universities, with five two-year colleges included in their organizational structure, will dedicate time to leadership and liaison with their campuses to support project goals.

MOA State Advisory Team – Continuing Members

Sheila Stearns, Commissioner of Higher Education. In response to concerns about the under-utilization of two-year education raised during her Fall 2007 listening tour of state, Commissioner Stearns led the effort to submit the original letter of interest in the MOA Initiative. Commissioner Stearns has attended both MOA Academies and has kept Montana’s MOA activities a focus for the
Joyce Silverthorne, P-20 Policy Advisor to the Superintendent of Public Instruction. When Superintendent of Public Instruction Denise Juneau took office in January 2009, she named Dr. Silverthorne, a tribal college educator and former member of the Board of Public Education, to a newly created position as P-20 policy advisor. Dr. Silverthorne was immediately added to the MOA State Team. She participated in the Opportunity Analysis during the Learning Year. When an unanticipated surgery prevented her from attending the MOA Academy in 2009, the Superintendent and another cabinet-level staff attended in her stead. She will co-chair the High School/College Transitions Workgroup.

Dan Villa, Education Policy Advisor to Governor Brian Schweitzer. Mr. Villa left a leadership position in the Montana Legislature to become the governor’s new education policy advisor in July 2009 and replaced his predecessor, Jan Lombardi, on the MOA State Team. Jan was extremely active in all activities of the Learning Year. Mr. Villa has shown the same level of commitment in his short tenure in office, reviewing and responding substantively to the Regents’ resolutions and drafts of the implementation grant proposal. He will serve on the Virtual Community College Workgroup.

Pat Wise, Governor’s Office of Economic Opportunity. Ms. Wise has been involved in Montana’s MOA activities since the submission of the letter of interest. She attended both MOA academies and participated in the Opportunity Analysis and Two-Year Education Summit. She was especially engaged in the Rapid Response Initiative, identifying training and support services for dislocated workers through adult education opportunities in Montana’s two-year colleges. She will co-chair the Workforce Responsiveness Task Force.

Senator Bob Hawks, Montana Legislature. Senator Bob Hawks, a Democrat from Bozeman, MT, is a veteran legislator with substantial experience on education and education-finance committees. His leadership has been recognized through successive appointments to the Postsecondary Education Planning and Budget Interim Subcommittee, which has been especially interested in two-year education over the past two biennia. Senator Hawks has attended both MOA Academies, as well as
the Two-Year Education Summit, and is particularly interested in the data and performance metrics aspects of our MOA work.

**Clay Christian, Vice-Chairman, Montana Board of Regents.** Mr. Christian has attended both MOA Academies and has been particularly engaged in issues surrounding outcomes-based funding. As Chair of the Regents’ Administration and Finance Subcommittee, he has led the effort to establish a workgroup focused on incorporating outcomes-based funding in the Montana University System’s allocation model.

**Royce Engstrom, Provost of The University of Montana.** Provost Engstrom coordinates academic leadership for the four campuses of The University of Montana, including three colleges of technology. As the only representative of a four-year college and/or research university on the original MOA State Team, he has been invaluable in developing four-year support for the MOA Initiative during the Learning Year. He participated in the Opportunity Analysis, has been active in communication with the Project Director and the State Team throughout the year, and has ensured the participation of his campuses in the Two-Year Education Summit and the High-Access Workgroup.

**Jan Wagner, Miles Community College Trustee.** Ms. Wagner is an elected trustee for Miles Community College. She has been an active member of the State Team during the Learning Year, participating in the Knowledge Collaborative Training, the Two-Year Education Summit, and the follow-up State Team/two-year CEOs pre-Academy meeting in May. She has been especially valuable in advancing the interests and concerns of Montana’s community college districts.

**President Joe McDonald, Salish Kootenai College.** Dr. McDonald is a tribal college president of national renown. He has also been active during the Learning Year, attending the Two-Year Education Summit and providing substantive feedback to the Project Director and State Team throughout the year. He has been especially helpful in providing suggestions for tribal college inclusion in the implementation grant proposal.

**Superintendent Tim Bronk, Darby School District.** Superintendent Bronk joined the state team midway through the Learning Year. He attended the Two-Year Education Summit and has been active
in providing the K-12 perspective to the state team as our implementation grant proposal has taken shape.

**Mary Sheehy Moe, Deputy Commissioner for Two-Year Education.** Dr. Moe left the position of Dean/CEO of MSU-Great Falls in 2008 to assume the newly created Deputy Commissioner position. She has served in administrative positions in two-year colleges since 1997 and has taught at the elementary, secondary, two-year college, four-year college and graduate levels. She directed Montana’s MOA activities during the Learning Year.

**Additional/New Members of MOA Implementation Grant State Advisory Team**

As we move from learning about productivity to developing, implementing, and evaluating our productivity agenda, Montana has concluded that we need to make changes in the state team that will broaden representation, draw more effectively on the talents and commitments within our two-year colleges, and intensify the engagement and commitment needed to advance support for the changes we are undertaking.

**Regent Lynn Hamilton.** Regent Hamilton has chaired the Board of Regents three separate times in her 13-year tenure. She provided the background documents for the Opportunity Analysis, actively followed the Knowledge Collaborative, and has provided extensive feedback on proposals, documents, and initiatives throughout the Learning Year. She is also a member of the newly created Regents’ Workgroup dedicated to reform/reinvention of Montana higher education.

**Representative Bob Lake.** Representative Lake is a veteran and respected legislator on the Republican side of the aisle who will bring bipartisanship to the State Advisory Team. He has served in leadership positions on education committees, interim committees, and finance committees and is currently one of Montana’s representatives on WICHE’s Legislative Advisory Council. He attended the Two-Year Education Summit, reviewed the Opportunity Analysis, and has provided important feedback on two-year initiatives over the past year.

**Dick Brown, Montana Hospital Association.** The addition of Mr. Brown will strengthen the business/industry voice on the State Advisory Team. As the director of the Associated Hospitals of
Montana, he has worked with the Office of the Commissioner of Higher Education for several years to address current and projected shortages in the healthcare workforce.

**Robert Nystuen, Business/Industry Representative.** Mr. Nystuen’s career in banking has spanned over 32 years, including positions in Havre, Bozeman, Livingston, Miles City and now Kalispell, where he is President of Glacier Bank. As Vice-Chair of the Flathead Valley Community College Board of Trustees, he attended the Two-Year Education Summit and has provided commentary on various aspects of the Opportunity Analysis and the implementation grant proposal. His advocacy for inclusion of business/industry in the implementation years has been especially noteworthy.

**MOA State Implementation Team**

To implement a project of the scope of Montana’s Opportunity Grant, leaders at each two-year campus and at the four-year campuses with a significant two-year mission must oversee the work on their campuses and coordinate the work among other two-year college leaders. The following leaders, all part of the existing Executive Committee of the Two-Year Education Council, will assume that function:

- Daniel Bingham, Dean/CEO, UM-Helena College of Technology
- Jim Cargill, President, Dawson Community College
- John Cech, Dean, MSU-Billings College of Technology
- John Garic, Dean, Montana Tech College of Technology
- Barry Good, Dean, UM-Missoula College of Technology
- Stefani Hicswa, President, Miles Community College
- Jane Karas, President, Flathead Valley Community College
- Anneliese Ripley, Director of Outreach, UM-Western
- Joe Schaffer, MSU-Great Falls College of Technology
- Frank Trocki, Chancellor, MSU-Northern

During the Learning Year, all of the two-year college leaders were extremely involved in the Learning Year, participating in the Two-Year Education Summit, the Opportunity Analysis, the High Access Summit, and numerous feedback loops. The following two members were also on the original State Teams:

- **President Jane Karas, Flathead Valley Community College.** Dr. Karas attended the 2008 MOA Academy, participated in the Opportunity Analysis, contributed to the Rapid Response Initiative, and attended the Two-Year Education Summit and follow-up State Team/two-year
CEOs pre-Academy meeting in May. She has interacted consistently with the Project Director throughout the year and has been especially active as a voice for the community college perspective.

- **Dean/CEO, Joe Schaffer, Montana State University – Great Falls College of Technology.** Dean Schaffer has participated in the Opportunity Analysis, contributed to the Rapid Response Initiative, and attended the Two-Year Education Summit and follow-up State Team/two-year CEOs pre-Academy meeting in May, the June 2009 MOA Academy, and the High-Access Summit in July. He has been particularly active in advancing and exploring options for integrating information systems and the virtual community college.

In addition to the members listed above, the following individuals are seen as crucial to the work of the Implementation Team:

- **Tom Gibson, Director of Distance Initiatives, Office of the Commissioner of Higher Education.** As the coordinator of distance learning for the Montana University System, Dr. Gibson’s expertise will be invaluable in the virtual community college initiative. Through his work, he has also become familiar with the program offerings and duplication issues at each two-year campus.

- **Rolf Groseth, MSU Vice-President of Inter-Campus Affairs.** Dr. Groseth has nearly a decade of experience in coordinating the work of the two-year colleges affiliated with Montana State University. As the two-year college presence at MSU takes greater shape, the MOA initiative is of particular interest to that university.

- **Richard Littlebear, President, Chief Dull Knife College.** Dr. Littlebear has been an active advocate for tribal college education in Montana for many years. He has followed the development of the implementation grant proposal and will bring the tribal college perspective to implementation issues.
## Appendix F:

## Integrated Operational Plan

### Integrated Operational Plan

<table>
<thead>
<tr>
<th>Operation and Staffing</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initial Phase (2010)</strong></td>
<td><strong>Middle Phase (2011-2012)</strong></td>
</tr>
<tr>
<td><strong>Overall MOA Coordination</strong></td>
<td></td>
</tr>
<tr>
<td>Project Director (.35 FTE)</td>
<td>• Appoint and convene advisory and implementation teams and workgroups; develop tasks and timelines.</td>
</tr>
<tr>
<td>Project Coordinator (1.0 FTE)</td>
<td>• Conduct kick-off conference announcing objectives, building awareness and commitment.</td>
</tr>
<tr>
<td>Admin. Asst. (.35 FTE)</td>
<td>• Hire project coordinator.</td>
</tr>
<tr>
<td>Commissioner (.05 FTE)</td>
<td>• Retain firm for strategic communications/engagement.</td>
</tr>
<tr>
<td>MSU President (.03 FTE)</td>
<td></td>
</tr>
<tr>
<td>UM President (.03 FTE)</td>
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<tr>
<td>State Advisory Team</td>
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<tr>
<td>State Implementation Team</td>
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</tr>
<tr>
<td><strong>Project Evaluation</strong></td>
<td></td>
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<tr>
<td>Project Evaluator (contract)</td>
<td>• Retain evaluator.</td>
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<tr>
<td></td>
<td>• Evaluator and Project Director attend MOA evaluation conference.</td>
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<td></td>
<td>• Evaluator conducts mid-course assessment and provides observations to state advisory and implementation teams/project director; teams provide appropriate guidance to workgroups and consultants.</td>
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<tr>
<td><strong>Project Evaluation</strong></td>
<td></td>
</tr>
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<td>Project Evaluator (contract)</td>
<td>• Retain evaluator.</td>
</tr>
</tbody>
</table>
### Strategy 1: Bring Full Two-Year Mission to All Two-Year Colleges (Adult Access Hubs, HS-College Transitions, Workforce Development)

<table>
<thead>
<tr>
<th>Full Mission Workgroup</th>
<th>Adult Access Task Force</th>
<th>Adult Basic Education Task Force</th>
<th>Workforce Responsiveness Task Force</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOA Project Director, Chair State Implementation Team volunteers MOA Project Coordinator</td>
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<td>MOA Project Director, Chair State Implementation Team volunteers MOA Project Coordinator</td>
</tr>
<tr>
<td>- Convene developmental program providers to plan for transition to two-year colleges.</td>
<td>- Gather information about models in other states, nations.</td>
<td>- Identify and evaluate options for bringing adult basic education to two-year campuses.</td>
<td>- Identify best practices in workforce responsiveness at the regional levels.</td>
</tr>
<tr>
<td>- Solicit campus feedback; relay issues and concerns to implementation team.</td>
<td>- Identify and retain project consultants.</td>
<td>- Develop plan for transition of programs to two-year colleges.</td>
<td>- Recommend processes for effective workforce responsiveness.</td>
</tr>
<tr>
<td>- Make policy recommendations on adult basic education and transfer to advisory team.</td>
<td>- Begin development of pilot project.</td>
<td>- Bring programs to 3 colleges of technology by Fall 2010.</td>
<td>- Develop evaluative tool for business/industry feedback on two-year colleges’ responsiveness.</td>
</tr>
<tr>
<td>- Begin the transition of developmental programs to two-year colleges.</td>
<td>- Finalize plan for adult-focused programs.</td>
<td>- Recommend policy, statutory changes if any.</td>
<td>- Implement best practices/evaluative tool on 3 campuses.</td>
</tr>
<tr>
<td>- Continue to solicit campus feedback; relay issues and concerns to implementation team.</td>
<td>- Create RFP for pilot and expansion.</td>
<td>- Bring programs to all colleges by Fall 2011.</td>
<td>- Monitor results; adapt processes and tool as needed.</td>
</tr>
<tr>
<td>- Make policy recommendations on adult basic education and transfer to advisory team.</td>
<td>- Select pilot project lead campus.</td>
<td>- Complete the transition of developmental programs to two-year campuses.</td>
<td>- Implement best practices and evaluative tool at all two-year campuses.</td>
</tr>
<tr>
<td>- Complete the transition of developmental programs to two-year campuses.</td>
<td>- Pilot adult-focused programming at lead campus in Year 3.</td>
<td>- Continue to solicit campus feedback; relay issues and concerns to implementation team.</td>
<td></td>
</tr>
<tr>
<td>- Continue to solicit campus feedback; relay issues and concerns to implementation team.</td>
<td>- Monitor pilot project and adjust plan as needed.</td>
<td>- Adjust policy recommendations as needed.</td>
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</tr>
<tr>
<td>- Adjust policy recommendations as needed.</td>
<td>- Expand to two other campuses in Year 4.</td>
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<td></td>
</tr>
</tbody>
</table>

**MOA Project Coordinator**

- Convene developmental program providers to plan for transition to two-year colleges.
- Solicit campus feedback; relay issues and concerns to implementation team.
- Make policy recommendations on adult basic education and transfer to advisory team.
- Begin the transition of developmental programs to two-year colleges.
- Continue to solicit campus feedback; relay issues and concerns to implementation team.
- Adjust policy recommendations as needed.
- Complete the transition of developmental programs to two-year campuses.
- Continue to solicit campus feedback; relay issues and concerns to implementation team.
- Adjust policy recommendations as needed.

**Adult Access Task Force Co-chairs TBD**

- Two-year admin & faculty
- Job Service staff
- Bus/industry/apprentice reps
- Adult education providers

- Gather information about models in other states, nations.
- Identify and retain project consultants.
- Begin development of pilot project.
- Finalize plan for adult-focused programs.
- Create RFP for pilot and expansion.
- Select pilot project lead campus.

**Adult Basic Education Task Force**

- Margaret Bowles, Chair
- ABLE Directors
- Two-year college staff
- MOA Project Coordinator

- Identify and evaluate options for bringing adult basic education to two-year campuses.
- Develop plan for transition of programs to two-year colleges.
- Bring programs to 3 colleges of technology by Fall 2010.
- Recommend policy, statutory changes if any.
- Bring programs to all colleges by Fall 2011.

**Workforce Responsiveness Task Force**

- Pat Wise, Co-Chair
- TBD, Co-Chair
- Outreach Directors
- Program Directors
- Bus/industry/Chamber Reps.
- MOA Project Coordinator
- MOA Project Director

- Identify best practices in workforce responsiveness at the regional levels.
- Recommend processes for effective workforce responsiveness.
- Develop evaluative tool for business/industry feedback on two-year colleges’ responsiveness.
- Implement best practices/evaluative tool on 3 campuses.
- Monitor results; adapt processes and tool as needed.
- Implement best practices and evaluative tool at all two-year campuses.
## Strategy 2: Implement Coordinated Approaches to Curriculum, High School-College Transitions, Transfer

<table>
<thead>
<tr>
<th>HS/College Transitions Workgroup</th>
<th>Curriculum Coordination and Alignment Workgroup</th>
<th>Technology for Efficiency Workgroup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joyce Silverthorne, Co-chair Mary Moe, Co-Chair K-12 admin, faculty Higher ed admin, faculty MOA Project Coordinator</td>
<td>Sylvia Moore, Co-Chair Mary Moe, Co-Chair Miscellaneous faculty and administrative groups Alignment Councils MOA Project Coordinator</td>
<td>Tyler Trevor, Chair Institutional researchers Chief info officers President Jim Cargill, DCC MOA Project Coordinator</td>
</tr>
</tbody>
</table>
| • Identify best practices in other states.  
  • Develop comprehensive protocol for advising, delivering transitions programs.  
  • Seek policy changes as needed.  
  • Pilot protocol at virtual community college, 3 campuses Fall 2010. | • Identify options for alignment of related instruction  
  • Implement best option with 6 career fields.  
  • Identify Regents’ transfer core.  
  • Seek policy changes as needed.  
  • Offer aligned related instruction in 6 career fields by Fall 2010  
  • Introduce regents’ transfer core at virtual community, participating colleges by Fall 2010. | • Seek broadband and systems funding to improve IT capacity statewide.  
  • Identify host campus for bringing Dawson CC onto Banner.  
  • Work through integration issues.  
  • Improve data warehouse codes needed to support project goals. |
| • Conduct conference to disseminate learning, best practices.  
  • Develop and refine web-based advising tools.  
  • Expand protocol to all “hubs” by Fall 2011. | • Offer aligned related instruction in additional 8 fields by Fall 2011.  
  • Continue alignment process with 16 additional career programs.  
  • Embed in college transitions protocols by Fall 2011.  
  • Develop shared articulations in four majors using Regents’ core. | • Pilot Banner integration at Dawson CC; provide training for key campus personnel.  
  • Seek additional funding for continued integration.  
  • Advocate for funding, policy changes as needed. |
| • Repeat professional development conference.  
  • Modify protocol based on results.  
  • Seek policy/statute changes as needed. | • Offer aligned related instruction in 30 career programs by Fall 2012.  
  • Continue alignment process and include in transitions protocols.  
  • Track results of students transferring with Regents’ transfer core.  
  • Implement shared articulations for four majors at participating campuses. | • Make necessary improvements in Dawson integration.  
  • Advocate for funding, policy changes, as needed.  
  • Continue integration process if possible. |
## Appendix F
### Integrated Operational Plan

#### Virtual Community College Workgroup
- Tyler Trevor, Co-chair
- TBD, Co-chair
- Participating colleges
- Gov's Ed Policy Advisor
- Distance Director
- MOA Project Director
- MOA Project Coordinator

- Identify participating campuses for virtual college.
- Develop processes for shared curriculum, business practices.
- Develop programs for pilot year.
- Seek policy changes as needed.

- Pilot virtual community college with Regents’ transfer core and 3 workforce programs.
- Monitor; report to legislature on results.
- Develop adult-focused programs for virtual college.

- Expand programming to include adult-focused options and additional workforce programs.
- Evaluate, improve, and expand adult offerings for virtual college.

#### Outcomes-Based Funding Workgroup
- Mick Robinson, Chair
- System CFOs
- MOA Project Director
- MOA Project Coordinator

- Engage consultant on outcomes-based funding.
- Explore and model options for outcomes-based funding.

- Phase in funding strategies in FY 2011-12.
- Monitor results, identify challenges.

- Continue phase-in, fine-tuning of funding strategies in FY 2013-14.

#### Strategic Communications and Engagement

##### Leadership/Ownership Activities
- Contracted Firm
- MOA Project Director
- MOA Project Coordinator

- Plan, conduct award announcement event; announce advisory and implementation teams.
- Identify and recruit key leaders for policy workgroups.
- Establish two-year agenda as standing item for interim legislative committee on postsecondary education.

- Deploy rapid response team.
- Release first progress report on two-year agenda.
- Hold town hall meetings on campuses (reform proposals).

- Release second progress report on the two-year agenda.
- Hold town hall meetings on campuses (implementation issues).

##### Research/Materials Activities
- Contracted Firm
- MOA Project Director
- MOA Project Coordinator

- Supplement existing opinion research on two-year education.
- Create case-making video using MOA and related data.
- Draft and disseminate case studies on reforms in other states.

- Draft and disseminate electronic fact sheets (FAQs, mythbusters, what’s in it for you).
- Create an e-mail “newsfeed” of two-year agenda updates for partner organizations’ newsletters and member communications.

- Conduct follow-up opinion research.
- Develop and disseminate flash videos on new offerings for students.
- Draft and disseminate fact sheets.
- Continue newsfeed.
<table>
<thead>
<tr>
<th>Grassroots Activities</th>
<th>Media Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contracted Firm</strong></td>
<td><strong>Contracted Firm</strong></td>
</tr>
<tr>
<td><strong>MOA Project Director</strong></td>
<td><strong>MOA Project Director</strong></td>
</tr>
<tr>
<td><strong>MOA Project Coordinator</strong></td>
<td><strong>MOA Project Coordinator</strong></td>
</tr>
</tbody>
</table>

**Grassroots Activities**
- Conduct tour of key communities that includes town hall meetings, listening sessions, school visits.
- Deliver presentations and conduct listening sessions with key groups.

**Media Activities**
- Conduct media tour to raise awareness, answer questions.
- Draft/place first round of op-eds (case-making).

**Grassroots Activities**
- Conduct second community tour.
- Deliver presentations and conduct listening sessions with key groups.

**Media Activities**
- Create e-bulletin (e-mail update to reporters on the two-year agenda).
- Draft/place second round of op-eds (endorsement of specific proposals).

**Grassroots Activities**
- Conduct third community tour.
- Deliver presentations and conduct listening sessions with key groups.
- Plan and execute electronic/new media ad campaign for virtual community college (targeting working adults).

**Media Activities**
- Continue e-bulletin
- Conduct second media tour to highlight progress, success stories.
### Appendix G-1:

**Budget Form and Working Spreadsheet**

#### Tab 1: Budget Summary

**Lumina Foundation for Education**  
**Making Opportunity Affordable – Opportunity Grant Program Proposal**  
**BUDGET FORM**

<table>
<thead>
<tr>
<th>Suggested Budget Categories</th>
<th>Requested Grant Fund Support</th>
<th>Total Grant Support Requested</th>
<th>Total Non-Grant Support</th>
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<tr>
<td></td>
<td>Year 1</td>
<td>Year 2</td>
<td>Year 3</td>
</tr>
<tr>
<td><strong>Direct Project Costs</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel Expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries (list staff, title, salary, % of time) *</td>
<td>50,000</td>
<td>51,500</td>
<td>53,000</td>
</tr>
<tr>
<td>Benefits (list % rate)*</td>
<td>23,600</td>
<td>24,800</td>
<td>25,900</td>
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<td>Subtotal: Personnel Expenses</td>
<td>$73,600</td>
<td>$76,300</td>
<td>$78,900</td>
</tr>
<tr>
<td><strong>Other Direct Expenses</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Materials and Supplies *</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Equipment Rental/Purchase*</td>
<td>3,000</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Travel*</td>
<td>124,700</td>
<td>94,500</td>
<td>71,600</td>
</tr>
<tr>
<td>Meetings/Conferences*</td>
<td>32,500</td>
<td>62,500</td>
<td>62,500</td>
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<tr>
<td>Consultants*</td>
<td>83,000</td>
<td>68,000</td>
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<tr>
<td>Evaluation*</td>
<td>40,000</td>
<td>40,000</td>
<td>40,000</td>
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<td>Communications*</td>
<td>118,300</td>
<td>70,000</td>
<td>90,000</td>
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<tr>
<td>Subcontracts or sub grants</td>
<td>-</td>
<td>20,000</td>
<td>80,000</td>
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<tr>
<td>Third Party Grant Management</td>
<td>-</td>
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<td>Subtotal: Other Direct Expenses</td>
<td>$403,500</td>
<td>$357,000</td>
<td>$356,100</td>
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<td><strong>2 Indirect Costs (if requested)</strong></td>
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<td>Indirect Expenses</td>
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<td>15,800</td>
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<td>Subtotal: Indirect Expenses</td>
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<td>15,800</td>
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<td><strong>3 Grand Total (to nearest 100)</strong></td>
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## Tab 2: Personnel Detail

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Annual salary</th>
<th>Percent time</th>
<th>Project salary year 1</th>
<th>Project salary year 2</th>
<th>Project salary year 3</th>
<th>Project salary year 4</th>
<th>Total</th>
<th>In-kind / other sources</th>
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<tr>
<td>Mary Sheehy Moe</td>
<td>Deputy Commissioner for Two-Year Education and Project Lead</td>
<td>$125,000</td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>35%</td>
<td>$43,800</td>
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<tr>
<td>Summer Marston</td>
<td>Exec. Asst to the Deputy Commissioner</td>
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<td>0%</td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>35%</td>
<td>$10,500</td>
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<tr>
<td>TBD</td>
<td>MOA Coordinator</td>
<td>50,000</td>
<td>100%</td>
<td>50,000</td>
<td>51,500</td>
<td>53,000</td>
<td>54,600</td>
<td>0%</td>
<td>-</td>
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<tr>
<td>Sheila Stearns</td>
<td>Commissioner of Higher Education</td>
<td>210,000</td>
<td>0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<td>$21,000</td>
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<tr>
<td>Tyler Trevor</td>
<td>Assoc. Comm - Planning</td>
<td>119,000</td>
<td>0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>15%</td>
<td>$17,900</td>
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<tr>
<td>Mick Robinson</td>
<td>Dep. Comm. - Fiscal</td>
<td>140,000</td>
<td>0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>10%</td>
<td>$14,000</td>
</tr>
<tr>
<td>George Dennison</td>
<td>President, UM-Missoula</td>
<td>205,000</td>
<td>0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>3%</td>
<td>$6,200</td>
</tr>
<tr>
<td>Geoff Gamble</td>
<td>President, MSU-Bozeman</td>
<td>205,000</td>
<td>0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>3%</td>
<td>$6,200</td>
</tr>
<tr>
<td>Salary Totals</td>
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<td></td>
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<td>$53,000</td>
<td>$54,600</td>
<td>$209,100</td>
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<td>$119,600</td>
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<tr>
<td>Benefits</td>
<td></td>
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<td></td>
<td>$16,000</td>
<td>$16,400</td>
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<td>Health Insurance</td>
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<td>$9,500</td>
<td>$10,200</td>
<td>$36,600</td>
<td>$9,000</td>
<td>$9,800</td>
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<tr>
<td>Total Personnel Services</td>
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<td>$73,600</td>
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<td>$76,300</td>
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<td>$81,700</td>
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### Fringe Benefit Detail

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<thead>
<tr>
<th>Component</th>
<th>Rate</th>
<th>Rate Details</th>
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<tbody>
<tr>
<td>Retirement contribution (Fac/Professional)</td>
<td>10.676%</td>
<td>Health Insurance-per month/per employee-Year 1</td>
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<tr>
<td>Unemployment</td>
<td>0.450%</td>
<td>Health Insurance-per month/per employee-Year 2</td>
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<tr>
<td>Workers’ Comp</td>
<td>0.695%</td>
<td>Health Insurance-per month/per employee-Year 3</td>
</tr>
<tr>
<td>FICA-OASDI-MCRE</td>
<td>7.65%</td>
<td>Health Insurance-per month/per employee-Year 4</td>
</tr>
<tr>
<td>SL/AL Term. Assessment</td>
<td>11.5%</td>
<td></td>
</tr>
<tr>
<td>Total - Faculty/Professional</td>
<td>31.0%</td>
<td></td>
</tr>
<tr>
<td>Tab 3: Other Expense Detail</td>
<td>Grant funds</td>
<td></td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Year 1</td>
<td>Year 2</td>
</tr>
<tr>
<td><strong>Materials and Supplies</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting and office supplies</td>
<td>2,000</td>
<td>2,000</td>
</tr>
<tr>
<td>subtotal</td>
<td>$2,000</td>
<td>$2,000</td>
</tr>
<tr>
<td><strong>Equipment</strong></td>
<td></td>
<td></td>
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<tr>
<td>Technology infrastructure from federal funds</td>
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<td>-</td>
</tr>
<tr>
<td>Office equipment for MOA coordinator</td>
<td>3,000</td>
<td>-</td>
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<tr>
<td>subtotal</td>
<td>$3,000</td>
<td>-</td>
</tr>
<tr>
<td><strong>Travel</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 persons to annual MOA meeting</td>
<td>8,000</td>
<td>8,000</td>
</tr>
<tr>
<td>2 persons to national evaluation meeting</td>
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</tr>
<tr>
<td>20 State Advisory Team 8 1d mtgs.</td>
<td>6,200</td>
<td>6,200</td>
</tr>
<tr>
<td>16 State Implementation Team 8 1d mtgs</td>
<td>4,900</td>
<td>4,900</td>
</tr>
<tr>
<td>Miscellaneous state teams/director travel to learn/disseminate</td>
<td>6,000</td>
<td>6,000</td>
</tr>
<tr>
<td><strong>Strategy 1 (Full Mission) Travel</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 Members Two-Yr Mission WG 1 day-mtgs</td>
<td>7,400</td>
<td>5,500</td>
</tr>
<tr>
<td>12 Members Adult Access WG 1 2-day mtgs; 11 1-day</td>
<td>8,200</td>
<td>5,500</td>
</tr>
<tr>
<td>20 Members ABE WG 2 2d mtgs; 3 1d mtgs</td>
<td>10,600</td>
<td>7,600</td>
</tr>
<tr>
<td>12 Members Workforce WG 9 1d mtgs</td>
<td>5,500</td>
<td>3,700</td>
</tr>
<tr>
<td>State visits/visitors/consultant RE adult access</td>
<td>10,000</td>
<td>10,000</td>
</tr>
<tr>
<td>State visitors on high school/college transitions</td>
<td>6,400</td>
<td>-</td>
</tr>
<tr>
<td><strong>Strategy 2 (Coordination) Travel (mil., food, lodg.)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16 Members HS/C Transitions WG 1 2d, 10 1d mtgs</td>
<td>11,000</td>
<td>7,400</td>
</tr>
<tr>
<td>18 Members Related Inst WG X 8 1d mtgs</td>
<td>5,500</td>
<td>5,500</td>
</tr>
<tr>
<td>16 Members Regents core WG 3 1d mtgs.</td>
<td>4,900</td>
<td>2,500</td>
</tr>
<tr>
<td><strong>Strategy 3 (Technology) Travel</strong></td>
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<td></td>
</tr>
<tr>
<td>10 Members T4E WG 12 1d mtgs</td>
<td>4,600</td>
<td>4,600</td>
</tr>
<tr>
<td>10 Members Virtual CC WG 4 2d mtgs; 12 1d mtgs</td>
<td>6,900</td>
<td>6,900</td>
</tr>
<tr>
<td>Travel for consultants (4) virtual college (2-day)</td>
<td>6,400</td>
<td>-</td>
</tr>
<tr>
<td>12 Strat 4 funding model WG 16 1d mtgs</td>
<td>7,400</td>
<td>7,400</td>
</tr>
<tr>
<td>Strat 4 funding model consultants (1) travel</td>
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<td>2,800</td>
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<td>subtotal</td>
<td>$124,700</td>
<td>$94,500</td>
</tr>
<tr>
<td><strong>Meetings/Conferences</strong></td>
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</tr>
<tr>
<td>Annual Workgroups Roll-out Conference (100 guests)</td>
<td>30,000</td>
<td>30,000</td>
</tr>
<tr>
<td>HS/College Transitions Best Practices (100 guests)</td>
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<td>30,000</td>
</tr>
<tr>
<td></td>
<td>Budget Form and Working Spreadsheet</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Appendix G</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Misc rental for WG rooms (est. 10/year@250/rm)</strong></td>
<td>2,500</td>
<td>2,500</td>
</tr>
<tr>
<td><strong>subtotal</strong></td>
<td>$32,500</td>
<td>$62,500</td>
</tr>
<tr>
<td><strong>Consultants</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integration of Dawson CC into existing SUR data system</td>
<td>30,000</td>
<td>30,000</td>
</tr>
<tr>
<td>Consultants on adult access</td>
<td>35,000</td>
<td>28,000</td>
</tr>
<tr>
<td>College transitions visitors’ honoraria $2,500 each</td>
<td>10,000</td>
<td>-</td>
</tr>
<tr>
<td>Consultation on funding models</td>
<td>15,000</td>
<td>10,000</td>
</tr>
<tr>
<td><strong>subtotal</strong></td>
<td>$83,000</td>
<td>$68,000</td>
</tr>
<tr>
<td><strong>Evaluation</strong></td>
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<td></td>
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<tr>
<td>Evaluation contract</td>
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<td>40,000</td>
</tr>
<tr>
<td><strong>subtotal</strong></td>
<td>$40,000</td>
<td>$40,000</td>
</tr>
<tr>
<td><strong>Communications</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teleconferences (120, 90-min. calls @ 12 c/minute per avg 15)</td>
<td>5,800</td>
<td>5,000</td>
</tr>
<tr>
<td><strong>subtotal</strong></td>
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</tr>
<tr>
<td><strong>Subcontracts/Grants</strong></td>
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<td></td>
</tr>
<tr>
<td>One lead campus to pilot, expand adult-focused models</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Dedicated time for pilot implementation, expansion</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>RFP for virtual community college development</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>RFP for HS/Transitions web-based advising tools</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>subtotal</strong></td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Indirect Costs</strong></td>
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<td></td>
</tr>
<tr>
<td>20% of salaries and benefits</td>
<td>14,700</td>
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</tr>
<tr>
<td><strong>subtotal</strong></td>
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<td>$15,300</td>
</tr>
<tr>
<td><strong>Total Non-personnel</strong></td>
<td>$418,200</td>
<td>$372,300</td>
</tr>
<tr>
<td><strong>Grand total</strong></td>
<td>$491,800</td>
<td>$448,600</td>
</tr>
</tbody>
</table>
Appendix G-2:

Budget Justification

This document provides justification and clarification supplemental to Appendix G-1, a working spreadsheet for Montana’s MOA Implementation Grant Proposal.

- The first tab of Appendix G-1 provides the summary budget form required in the RFP for all grant proposals.
- The second tab provides detail on Personnel Expenses associated with the grant.
- The third tab provides detail on Other Expenses associated with the grant.

Direct Project Costs

Personnel

All personnel expenses, both grant-funded and in-kind, are presented on the second tab of Appendix G-1.

Salaries

This item includes salaries for the following key project personnel (Salary increases in the spreadsheet reflect an assumption of a 3% annual increase. Please note that, other than the Project Coordinator, all personnel costs are provided in-kind.):

- **Project Coordinator.** Funded 100% by the grant, the Project Coordinator will staff 5 workgroups and 3 taskforces, organize meetings and conferences, and perform administrative, fiscal management, communication, organizational, and coordinating duties. The coordinator will report directly to the Project Director.

- **Project Director.** The Deputy Commissioner for Two-Year Education will continue to direct the project, dedicating 35% of her time in-kind to project oversight, leading and coordinating the work of the state advisory and state implementation teams, co-chairing three workgroups (Strategies #1 and #2), participating actively on the other workgroups and task forces, and providing advocacy and visibility for the project.

- **Administrative Assistant.** The executive assistant to the Deputy Commissioner/Project Director will also dedicate 35% of her time as in-kind support of the activities of the Project Director.
• **Commissioner of Higher Education.** The Commissioner will continue to provide leadership and advocacy for the project, dedicating 10% of her time in-kind to serve on the state leadership team, and interacting with state and institutional-level stakeholders.

• **Deputy Commissioner for Administration and Finance.** As chair of the project’s Outcomes-based Funding Workgroup (Strategy #4), the Deputy Commissioner will provide in-kind 10% of his time to connect the work of that committee to a more comprehensive initiative to implement outcomes-based funding for all campuses of the Montana University System.

• **Associate Commissioner for Planning, Technology, and Communication.** As chair of the Technology for Efficiency Workgroup and the Virtual Community College Workgroup (Strategy #3), the Associate Commissioner will dedicate 15% of his time in-kind to creating the technology infrastructures needed to improve access and efficiency.

• **President, Montana State University.** As the senior manager of all four campuses affiliated with Montana State University, the President will provide leadership to the campuses and liaison from the campuses to the Commissioner, the Regents, and the State Advisory Committee, dedicating 3% of his time in-kind to support the project.

• **President, University of Montana.** As the senior manager of all four campuses affiliated with the University of Montana, the President will provide leadership to the campuses and liaison from the campuses to the Commissioner, the Regents, and the State Advisory Committee, dedicating 3% of his time in-kind to support the project.

**Benefits**

The clarification of calculations for Fringe Benefits is provided on the second tab of Appendix G-1.

**Other Project Expenses**

Other project expenses, funded by the grant, in-kind resources and other resources, are presented on the second tab of Appendix G-1.

**Materials and Supplies**

- Our strategies require 5 workgroups and 3 taskforces to meet 3-4 times/year, 1-2 major conferences each year, and advocacy and communication efforts with stakeholder groups that may require additional meeting and office materials. Because we will rely on electronic support for meetings and communication, we have budgeted minimally in this area.
Equipment
- The technology infrastructure needed to support Strategy #3 will be provided by a legislative allocation as indicated in HB 645 of the 2009 Montana Legislature.
- The Project Director will require basic office equipment, to include laptop computer, telephone, office furnishings and supplies.

Travel
Line items under Travel are presented by functional groups, beginning with Project Director and State Team travel, and continuing with Travel associated with each Strategy and its Workgroups.
- **Out-of-state travel** reflects travel of 10 state team members to the annual MOA meeting, 2 persons traveling to the state evaluation meeting, and various visits to/from other states, as well as consultants’ travel. Because of Montana’s location, flights are more expensive than they are elsewhere. Calculations for out-of-state travel assume:
  - $1,000/flight
  - $150/night for lodging (2 nights for 1-day meeting; 3 nights for 2-day meeting)
  - $50/day for meals (2 days for 1-day meeting; 3 days for 2-day meeting)
- **In-state travel** reflects travel of 2 state teams, 5 workgroups, and 3 taskforces meeting 3-4 times year. Calculations for in-state travel per participant assume:
  - An average of 300 miles of travel per participant @ the state rate of 28 cents/mile
  - Lodging at $90 night, assuming an average of 1.5 “nights” for 1-day meeting; 2 nights for 2-day meeting;
  - Meals averaging $19/day for 1-day meeting; $44 total for 2-day meeting
- **Miscellaneous travel** has been budgeted for the MOA Project Director and/or state team members as needed and for state visits and state visitors to support the adult access and high school to college transitions initiatives.

Meetings/Conferences
- A major “roll-out” conference will be a major MOA event each year as we build awareness, professional development, and investment in our productivity agenda. The conference cost for 100 participants is based on the learning year cost for the Two-Year Education Summit ($20,000 for 65 participants), assuming travel, lodging, and mileage will be covered and speaker honoraria will be provided.
• A professional development conference to support the implementation of the high school to college transitions protocol is in the budget for Years 2 and 3 of the grant. The conference cost for 100 participants is based on the learning year cost for the Two-Year Education Summit ($20,000 for 65 participants), assuming travel, lodging, and mileage will be covered and speaker honoraria will be provided.

• Collectively, the teams and workgroups will have 30 meetings annually. Whenever possible, colleges will provide meeting space in-kind. In the event that campus space is not available, meeting room rental for 10 meetings/year has been budgeted at $250/meeting.

Consultants
• Through HB 645, the Montana legislature has provided funding for the enterprise consultants to integrate Dawson Community College into the Montana University System’s enterprise information system platform. Grant funding has been budgeted to provide for dedicated time of IT professionals on the host campus and training and support costs for Dawson Community College.

• As major initiatives of our proposal, consultants for the adult access initiative, the college transitions initiative, and outcomes-based funding have been budgeted, with an emphasis on the early years of the grant.

Evaluation
• $40,000 has been dedicated to a contracted evaluator. Other line items dedicate funding for travel and assume dedicated time of the Project Director and the Project Coordinator.

Communications
• An average of 30 conference calls annually has been included in the budget, assuming each call will average 90 minutes @12 cents per participant and an average of 15 participants.

• The Strategic Communications and Engagement items reflect a major focus of the grant. Assumptions include:
  o Opinion Research ($80,000): Two rounds (Year 1 and Year 4) of professionally facilitated focus groups; technology platform for online survey.
  o Advising / Technical Assistance ($120,000): Contracted consultant to aid in message development, planning and execution of communications strategies and tactics; assumes 20 days per year for four years.
Meetings / Events / Travel ($68,000): Site-related expenses for announcement event; mileage, site-related expenses, and materials for three statewide community tours; mileage, site-related expenses, and materials for two statewide media tours.

Design / Printing ($23,000): Contracted consultant to design identity materials and fact sheet/report templates and provide layout services for major reports and conference materials (160 hours over four years @ $100 per hour); printing costs for limited runs of major reports.

IT / Multimedia ($60,000): Includes design/development costs for Web presence; production and editing of three flash videos; design and dissemination expenses for broadcast e-mailings.

Paid Advertising ($40,000): Broadcast and Internet advertising for new/expanded programs and services (e.g., virtual college and adult-focused programming); list acquisition and access fees for “netroots” outreach to targeted groups (e.g. employers in specific fields, working adults in specific communities/regions); search engine optimization for sites featuring new/expanded programs and services.

Subcontracts
- Developing significantly different delivery models for adult-friendly programs and services is a major grant initiative. Through a contract with one lead two-year campus and two cooperating campuses, we will pilot the models in Year 3 on one campus and expand to two additional campuses in Year 4. $75,000 per campus per year provides appropriate support for dedicated staff time as we implement this initiative.
- The virtual community college has also been a major grant initiative; it was the “nugget” of our learning year proposal. Through HB 645, the Montana legislature has allocated $1,100,00 to support this project.
- High school/college transitions is a major grant initiative. This item contracts through RFP to create accessible, flexible, web-based advising tool for high school/college transitions as the new protocols are launched.

Indirect Costs
- 20% of total grant-funded salaries and benefits (Project Coordinator) have been budgeted for indirect costs.