

BILL & MELINDA
GATES *foundation*

State Systems Transformation: Pre-Convening Material
Visioning and Alignment Exercises

Please email to mpiltch@deloitte.com by April 21, 2014

Monitor Institute | Deloitte Consulting LLP

Part 1: Goals (brief response section)

- What is the guiding goal for your system (for example, 2020 or 2025 degree production)?

An overarching goal for the Montana University System has been to increase the state's educational attainment levels from 40 percent in 2013 to 60 percent. This serves as the system's guiding goal, but a specific degree production target has not been adopted.

Strategies:

1. We focused the missions of all Montana University System (MUS) 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 rebranded them all compellingly and distinguished them clearly from their four-year counterparts. By shifting these programs to the sector with lower costs, we created **savings that has been reinvested in affordability and innovation measures**.
2. We **improved access, student success, and efficiency through state-level coordination and collaboration**. We developed common core requirements and shared articulations for workforce and transfer programs to facilitate readiness, dual enrollment, and transfer. We are working to 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 underscore our commitment to educate and train our people more affordably.
3. We **created 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.
4. We are working to **create funding incentives at the student and the institutional levels** to promote degree completion and assure quality.

In addition, we have worked to make Montana's two-year colleges more affordable by freezing tuition at the two-year colleges for seven consecutive years bringing the tuition as a percentage of four-year tuition from 69% in 2002-03 to 52% in 2013-14.

Relative Price	2002-03	2007-08	2011-12	2012-13	2013-14
MT 2-Year above WICHE Average	1,139	786	210	57	\$(105)
MT 2-Year as % of MT 4-Year	69%	58%	54%	52%	52%

- What is the metric you are using to measure yourselves against progress toward that goal? (e.g., total degrees, annual percentage increase, sub-targets for Associate's / Bachelor's degrees, targets for specific student populations, institutional targets etc., where applicable)

The Montana University System is engaged in the process of exploring and developing performance funding models to be included as an additional component in the allocation methodology for distributing state appropriations to the MUS campuses.

The process has been split into two phases, 1) a short-term pilot phase directed at the allocation of funds specifically for FY 2015, and 2) a second phase aimed at developing a performance funding model to be used on a longer-term basis.

This second phase began in the 2013-14 academic year, whereby the MUS engaged faculty and staff throughout the system in an effort to fully develop a performance funding model. A Performance Funding Steering Committee has been appointed to provide oversight and direction of this process.

We agreed to utilize a set of progress and outcome metrics to measure improvement. Those metrics include degree production for the various levels of undergraduate degrees and certificates, time to degree, credit accumulation, and retention rates, among others. See (<http://www.mus.edu/CCM/progress-and-outcomes.asp>).

- What is the identified gap based on that metric? In addition, in short answer form, please reflect on the current capacity of your system to meet that goal.

We are in the early stages of measuring and analyzing our new set of completion metrics. As a result, we have not formally identified the targets or gaps within our metrics. We understand that the Montana University System plays a significant role in increasing the percentage of the population with a higher education credential from 40% to 60% and that it will require a dramatic and sustained increase in degree production.

Two key target areas identified as a result of our College!NOW initiative include deficiencies associated with serving students enrolled in developmental education and improving the MUS outreach to adult learners. Montana has an estimated 145,000 adults between the ages of 25 and 60 who have earned some college but no postsecondary credential. In addition, the State has an estimated 65,000-70,000 adults who have not completed their high school diploma or passed a high school equivalency exam.

Developmental Education:

During FY 12-13, the Commissioner of Higher Education created a statewide Developmental Education Taskforce which was charged with forming recommendations to the Board of Regents (BOR) with respect to improving the System's ability to respond to students who arrive

not ready for college level math or writing. The Taskforce mission was related to two goals within the MUS strategic plan:

Goal 1 Access & Affordability

Increase the overall educational attainment of Montanans through increased participation, retention and completion rates in the Montana University System (MUS).

Goal 3: Efficiency & Effectiveness

Improve institutional and system efficiency and effectiveness.

HISTORY OF THE TASK FORCE

In October of 2012, Commissioner Clayton Christian formed the Developmental Education Reform Task Force (DERTF). The group was charged with the review of developmental education practices throughout the MUS and called upon to make recommendations for the System to become the premier purveyor of developmental education in more streamlined and efficient ways, resulting in greater student success.

Through data and research in structure and policy, the DERTF was asked to holistically examine the role that developmental education plays in overall student success by completing the following activities:

1. Conduct baseline analysis of Montana Developmental Education Programs.
2. Utilize data from statewide ACT testing to inform planning and high school intervention opportunities.
3. Analyze existing national research and promising practices.
4. Analyze promising existing Montana Developmental Education Reform and existing pilot project efforts.
5. Research prospective grant/external funding options to support reform efforts.
6. Develop recommendations to be presented to the Board of Regents (BOR) in May 2013, for reform based on local and national best practices and research. Those recommendations were to specifically address:
 - Establishing a consistent approach system-wide for providing developmental education.
 - Creating consistency of faculty status of developmental education instructors.
 - Creating consistency of oversight of developmental education courses/services to the two-year campuses.
 - Standardizing reporting on developmental education success and student progression through college level course work via an annual report to the BOR.

In May 2013, the Board of Regents (BOR) adopted seven recommendations from the State's Developmental Education Task Force. Under these recommendations, the Regents and Office of Public Instruction (OPI) will:

1. Work together to develop common goals and strategies related to communication regarding College Readiness.
2. Create a common placement system using multiple measures.
3. Create Developmental Education/Gateway Discipline Councils (reading, writing and math) with the goal to increase communication and scalability of best practices and course redesign pilots.
4. Create consistency across the system by requiring that all developmental education be taught by college faculty, or by part-time faculty whose supervision is integrated into the academic structure.
5. Create a requirement for campus long-term tracking of students enrolled in developmental courses to gateway courses and on to completion using multiple indicators of success.
6. Create policy strongly recommending all entering students who are placed into a developmental math or writing course register for those courses during their first semester and require they complete those initial courses by the end of the second semester.
7. As we move into the second phase of Performance-Based Funding, recommend the BOR allocate a portion of the performance-based funding resources to support developmental education reform recommendations.

The Developmental Education Taskforce which was to exist for only a single year, disbanded following the May 2013 BOR meeting. In September 2013, the Commissioner created a Developmental Education Council which was charged to implement the recommendations of the former Developmental Education Taskforce co-chaired by the MUS Deputy Commissioner for Two-Year and Community College Education and the Deputy Commissioner for Academics, Research, and Student Affairs. Since its creation, the Developmental Education Council has led a system wide effort to scale best practices from campus pilot projects. These include co-requisite options for college-level math and writing courses and technology-assisted emporium-style initiatives, such as the EdReady pilot implemented at the University of Montana in partnership with the Montana Digital Academy. In addition, the Council created two faculty disciplinary councils focused on both placement and intervention strategies associated with improving student placement and success in college level math and writing courses.

EdReady Pilot:

The MUS recently partnered with the Montana Digital Academy (MTDA) on a web-based pilot focused on helping students test for college readiness, create a personalized study path to fill knowledge gaps, and more rapidly enter into college-level math and writing. The MTDA is a partnership with the Office of Public Instruction (OPI) to provide: statewide credit recovery and original credit opportunities for Montana high school students; online remedial education for high school students not prepared for college coursework; and statewide access to online dual enrollment courses at two-year colleges. During the Summer of 2013, the MTDA, in partnership

with the University of Montana (UM), launched an online EDReady pilot involving 66 students. The results were significant, with 86% (44) of the students who finished the EdReady program increasing their ALEKS placement test score and subsequently enrolling in a higher math course at UM. This pilot demonstrates potential for scalability across the MUS and the State's seven tribally controlled colleges; the Montana educational system is poised to provide EDReady to a larger student population across the State.

Outreach to Adult Learners:

In 2009, the Montana University System (MUS) was awarded a grant from the Lumina Foundation, which was titled College!NOW, to increase higher education access and success in the state. During the course of the College!NOW initiative, it was recognized that adult engagement in higher education could be greatly improved. A workgroup entitled "Adult Friendly Programming" was formed to discuss strategies to engage and support the adult learner. Data was summarized for the group regarding the enrollment of non-traditional aged students in the state. The data showed that Montana ranks 11th among 14 western states in the number of adult students, ages 25-64, who are enrolled in two-year education.

- In July, 2011, representatives from the Council for Adult and Experiential Learning (CAEL) spoke via conference call to the workgroup about 1) The Adult Learner Focused Institution (ALFI) Assessment; 2) Environmental Scanning; 3) Outreach & Communication Strategies.
- Spring 2012 - The ALFI Assessment was conducted with 12 Montana two-year colleges which resulted in a unique report generated for each college on identified strengths and areas for improvement as well as an overall state system report. CAEL representative, Judy Wertheim traveled to Montana to review results and answer questions from MUS two-year leaders. LearningCounts.org, an online PLA service, was first introduced via Judy's presentation.
- Fall 2012 - A Two-Year College Leadership Retreat, hosted Amy Sherman of CAEL, was held at Highlands College to discuss approaches for ALFI assessment follow up along with overview and strategies to introduce, expand on, or implement Prior Learning Assessment (PLA). Issues and challenges were also discussed in breakout sessions.
- Winter 2013 - Due to expanded interest in PLA, a group of six MUS representatives attended the annual CAEL national conference; four of the six attended the Portfolio Assessment (PLA 101) pre-conference.
- Summer 2013 - In an attempt to broaden MUS two-year college staff and faculty understanding of LearningCounts.org, a webinar was presented by CAEL to approximately 35 MUS attendees.
- Winter 2013 - Montana Legislature convened and HB317 was approved by the Montana Legislature requesting the Montana Board of Regents (BOR) to develop criteria for awarding credit for learning through military service.
- Spring 2013 - The BOR revised Policy 301.5 to provide military and veteran students a consistent opportunity across campuses of the MUS to demonstrate, for credit, college and university-level learning gained in military-based courses, trainings and experiential settings.

- Fall 2013 - Montana's Office of the Commissioner of Higher Education (OCHE) was selected as one of three state systems to participate in CAEL's Lumina Foundation funded initiative to advocate for the adoption of prior learning assessment (PLA) policies, practices, and services with LearningCounts.org as one important method for getting PLA to scale in Montana, to increase adult student recruitment, persistence, and success.
- Winter 2014 - Three of Montana's campuses were selected via RFA to participate in a PLA systems project to pilot Learning Counts.
- Winter 2014 - Survey of "Prior Learning Assessment Policies and Practices at Montana University Institutions" sent to 16 Montana University System campuses and Montana's seven tribal colleges. We received 100% response from the MUS campuses. They are:

Montana State University - Bozeman

Gallatin College MSU

Montana State University - Billings

City College MSU Billings

Montana State University - Northern

Great Falls College MSU

University of Montana - Missoula

Missoula College UM

Bitterroot College

Montana Tech UM

Highlands College of MT Tech

University of Montana - Western

Helena College UM

Dawson Community College

Flathead Valley Community College

Miles Community College

Next Steps: At this juncture, the work completed from 2010 to 2014 has set the stage for the MUS to consider what strategies and practices should be implemented to better reach out to Montana's adults via PLA. The results of the survey of PLA policies and practices now allows us to understand more about what access MUS students do or do not have to prior learning assessment in locations throughout the state. MUS can use this information to determine next steps needed to establish a system-based approach to PLA policies and practices. This data, along with the LearningCounts.org pilot project will also allow us to determine if there may be an advantage to have single source points-of-contact to provide specific kinds of PLA or if some practices should be scaled up throughout the state. This rich data will also allow OCHE and CAEL to consider approaches geared toward training faculty and staff more broadly about PLA. Finally, ways to better reach out to Montana's adults must be considered, especially when looking at unemployed or underemployed workers, workers wanting to gain their first or a new credential, veterans who have valuable learning experiences that may be applied toward a credential, and those adults who just want to change lanes in their job.

OCHE will form a workgroup of key faculty and staff who will work side-by-side with staff from OCHE and CAEL to consider next steps to promote greater consistency and access to PLA while ensuring compliance with regional and program accreditation policies. To give voice to the adult learner, OCHE will identify one to two adult students to serve on the workgroup. The workgroup will carefully consider the unique attributes and potential of Montana’s campuses and ensure that stakeholders have avenues for input to the workgroup. Consideration will also be given to resources available for PLA in our geographically large state with an eye toward how we can best serve our adult students throughout the state. Finally, attention will be given to concerns expressed by MUS four-year institutions at the baccalaureate level. OCHE is fully aware the “top down” approaches to this policy work is not an option. When considering system changes challenges will arise, this workgroup will work to engage stakeholders throughout the process.

Part 2: Introspection on the Makeup of Your System (brief response section)

- Within your system, reflecting on the number and types of institutions, their missions, and the populations they serve, how equipped are you to deliver on the capacity needs identified based on your goals?

The Montana University System (MUS) is comprised of 16 public universities and colleges, enrolling more than 47,000 students each semester. The Montana Board of Regents (BOR) has adopted a “Success Agenda” designed to increase educational attainment of Montanans and provide an efficient and effective system of higher education. For example, distinct roles and responsibilities have been carved out for the campuses (Doctoral Research Universities, Baccalaureate/Masters Universities, Comprehensive Two-Year Colleges). Other areas of transformative infrastructure will support MUS efforts, including distinct admissions standards, common course numbering, expanding the two-year college mission, faculty and staff support and improved communication.

- To what degree are individual institutions engaged in your overall transformation work?

Credit Transfer: Innovations such as common course numbering involves all units of the MUS and requires a 100% faculty and staff commitment. Additionally, initial efforts to create ease of transfer with the sovereign tribal colleges has gained momentum.

Prior Learning Assessment: A recent survey of all 16 MUS universities and colleges was conducted by the Council for Adult and Experiential Learning (CAEL). Although each campus offers some degree of assessment, it is not well understood or utilized. The simple fact that each campus offers PLA sets a foundation to expand PLA – but there is a significant amount of room for collaboration and innovative approaches to serving a vast state with one million residents.

The Office of the Commissioner of Higher Education (OCHE) was selected as one of three state systems to work with CAEL on a state systems adoption project. Three campuses in the MUS have been invited to serve as featured network institutions to pilot LearningCounts.org, a PLA online service that offers portfolio assessment. This pilot will include targeted marketing to adult students in the state.

EdReady Pilot Expansion: The MUS will leverage a 2.4 million dollar grant from the Dennis and Phyllis Washington Foundation to implement EdReady across Montana.

- Who are your key partner institutions or potential partners in this work? And, where are the areas of opportunity to support institutions?

The Leadership Team and staff at OCHE will work with all 16 campuses of the Montana University System. Ongoing engagement of the Board of Regents will occur to seek input and deliberation. Other key partners include Complete College America, Montana Digital Academy, Council for Adult and Experiential Learning, the Governor’s Office, Montana’s workforce partners, Montana Job Service, Office of Public Instruction, Montana Department of Labor and Industry, State Workforce Investment Board, Dennis and Phyllis Washington Foundation, and the Montana Legislature.

The Leadership Team and staff will reach out to Montana’s sovereign tribal colleges in an effort to collaborate on selected initiatives.

Part 3: The Ten Types of Innovation

Please find the Ten Types model below for your use in the following exercise:

	Innovation Type	Definition
Configuration	Economic Model	How you fund your programs
	Network	How you connect with others to create impact
	Structure	How you align your talent and assets
	Process	What signature or superior methods you use for doing your work
Offering	Program Performance	The distinguishing elements of your core programs or services
	Program System	How your programs or services complement one another
Experience	Support Service	What support you provide to enhance core programs
	Channel	How you reach and deliver programs to your stakeholders
	Brand	How you represent your organization and programs

Engagement	How you foster distinctive interactions with your stakeholders
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- Please select the 3-5 innovation categories you believe to be most important to achieving transformation in your state.

Innovation Type	Top 3-5? If so, write a brief explanation as to why
Economic Model	
Network	Partnership with the Montana Digital Academy to expand EdReady pilot; partnership with CAEL to expand PLA pilot
Structure	
Process	<p>Implementing PLA so it is better understood, more broadly marketed, and expanded to key locations in the state will allow Montana's adults to have greater opportunity for credential and degree completion.</p> <p>EdReady is an innovative approach to identify and remediate students who need additional help in math. The fact that it is offered online creates an exciting opportunity to effectively assess all students from 7th grade through higher education.</p>
Program Performance	Relationship to Performance Based Funding Metrics
Program System	Increase access and success (incoming students plus new or returning adult learners)
Support Service	
Channel	
Brand	The continued strategies involved in rebranding the two-year colleges in the state will include reaching out to adults currently enrolled in higher education as well as those who are considering enrolling in college. The rebranding and mission expansion includes focus on re-inventing developmental education approaches for better retention and completion as well as reaching out to Montana's 135,000 adults with "some college-no degree."
Engagement	

- Below is our preliminary mapping of the innovations described in your letter of interest, providing one perspective of where your work falls within the Ten Types of Innovation. On the next page, you will have an opportunity to revise the mapping based on your direct knowledge of the nature of these initiatives.

	Program Description	Economic Model	Network	Structure	Process	Performance	Program	System	Support	Service	Channel	Brand	Engagement
Community College Rebrand	<ul style="list-style-type: none"> Took better advantage of underutilized resources that housed our technical colleges (formerly called Colleges of Technology), which were not seen as first-choice institutions 											✓	
Course Standardizations	<ul style="list-style-type: none"> Developed common course numbering and a set of common general education core requirements 				✓								
EdReady	<ul style="list-style-type: none"> Web-based pilot focused on helping students to test for college readiness, create a personalized study path to fill knowledge gaps, and more rapidly enter college-level math and writing 				✓			✓					
PLA and Developmental Ed	<ul style="list-style-type: none"> Create taskforce to oversee PLA guidelines Engage faculty and 		✓		✓			✓					✓

	<p>provide PLA training</p> <ul style="list-style-type: none"> • Support the development of institutional policies to build more robust PLA programs • Build employer capacity for promoting PLA • Create awareness of ed avenues for adults • Create unique student support systems • Engage the tribal colleges 									
<p>Two Year Education Expansion</p>	<ul style="list-style-type: none"> • Expanded the missions of the former technical colleges and two-year programs within the State’s universities to implement the full community college mission. • Increased the number of comprehensive two-year colleges in the State from three to ten • Increased ability to reach out to students who would not typically consider enrolling in a four-year school 							✓		✓

- Please revise the mapping in the chart below. In addition, we have provided rows for you to add initiatives you feel are particularly important but that are not included in our preliminary mapping.

	Content	Network	Structure	Process	Program	Program System	Support Service	Channel	Brand	Engagement
Community College Rebrand									✓	
Course Networking				✓						
EdReady				✓			✓			
PLA and Developmental Ed		✓		✓			✓			✓
Two-Year Education Expansion								✓		✓
Reaching the Adult Learner		x		x			x			x

- Please reflect on the chart above – especially any major gaps. Are there types of innovation that would support or strengthen your initiatives individually?

Focus One: Expansion of EdReady to both secondary and postsecondary institutions in Montana

EdReady Montana – Expansion to Grades 7-12:

EdReady is a Math readiness tool which will be made available at **no cost** to Montana middle and high school students in grades 7-12 (funded by the Dennis and Phyllis Washington Foundation gift). Interested schools can work with the Montana Digital Academy (MTDA) to use existing assessments or set up custom options for students to measure their math readiness for a variety of educational goals. A few of those options are listed below. If you have other goals in mind or want to discuss how to get set up, contact the staff at MTDA.

EdReady is best utilized as a program to support student needs in their mathematics classes. It is not a full “course” but rather an online assessment tool which features a **personalized learning path** for each student to help them strengthen their math competency.

Secondary School Assessments
7th Grade Readiness
8th Grade Readiness
Algebra Readiness
Geometry Readiness
Pre-Algebra Readiness
Trigonometry Readiness

Placement Test Assessments
Accuplacer® - Arithmetic
Accuplacer Math Preparation
SAT® Math Preparation
COMPASS® Math Preparation
Accuplacer® - Elementary Algebra
ACT® Math Preparation
GED® Prep K-8
College Math Readiness
Accuplacer® - College Level Math
GED® Prep 9-12

EdReady Montana – Expansion to Postsecondary:

EdReady Montana is a Math readiness tool available to all Montana college and university students who need developmental math assistance. Interested colleges and universities can work with the Montana Digital Academy (MTDA) to use existing assessments or set up custom options for students to assess their math readiness for a variety of educational goals. A few of those options are listed below. If you have other goals in mind or want to discuss how to get set up, contact the staff at MTDA.

EdReady is best utilized as a program to support a school’s existing developmental mathematics assistance programs. It is not a full “course” where teaching services are supplied by MTDA. It is a supplemental online computer assessment and personalized learning path curriculum that our staff will help you apply to your program to ease the transition from developmental math to college or university level math.

Higher Education Assessments
M105 Readiness
M111 Readiness
M115 Readiness
M121 Readiness
M135 Readiness
M162 Readiness

Placement Test Assessments
Accuplacer® - Arithmetic
Accuplacer Math Preparation
SAT® Math Preparation
COMPASS® Math Preparation
Accuplacer® - Elementary Algebra
ACT® Math Preparation
GED® Prep K-8
College Math Readiness
Accuplacer® - College Level Math
GED® Prep 9-12

Focus Two: Prior Learning Assessment (PLA) Expansion in Montana

Objectives of PLA in the Montana University System

PLA can be used to meet various objectives for both students and MUS institutions. PLA can reduce the time and cost for students to earn a degree, provide an incentive for non-traditional students to begin or finish a degree, and provide more flexibility and control for students. At the same time, PLA can serve as a tool for institutions to attract students consistent with their academic missions and help institutions meet enrollment goals. Whereas the number of high school graduates in Montana is expected to remain flat for the next decade, the number of adults ages 22 through 65 in Montana is expected to grow over the next five years totaling over 145,000. Offering PLA is a way to provide new avenues for access and offers an opportunity for adults to validate learning obtained on the job or via other venues. PLA can help increase college enrollment from this growing segment of the population.

Prior Learning Assessment Methods

PLA methods generally fall into three categories: credit by examination, portfolio-based assessment, and other evaluated non-college programs. Credit by examination includes tests created and offered by individual academic departments, as well as nationally recognized examinations offered by third parties, such as the College Level Examination Program (CLEP). Students who score at or above a minimum level on these tests are deemed to have already obtained academic knowledge in the subject area and receive credit.

Through portfolio-based assessment, students document evidence of prior learning in order to make a convincing case to faculty that knowledge intended to be imparted through certain course requirements and/or electives has already been gained. Faculty then has full discretion to decide whether to award credit for the prior learning demonstrated through the portfolio. Three Montana institutions will be participating in a Lumina sponsored grant with CAEL using the Learning Counts.org beginning Fall 2014 and continuing through Spring 2016.

Other non-examination options include such methods as the evaluation of military or corporate training by the American Council of Education and assessment of a student's professional certifications for college credit.

A goal for MUS is to increase access to the various PLA methods for Montana's adult learners. Based on the recent survey, all MUS institutions offer some form of PLA, with the most common methods being standardized via institutional challenge exams and ACE evaluation of military learning. It was difficult to make comparisons among the institutions with regard to utilization due to inconsistent record keeping or a lack of reporting at many institutions. However, there is general agreement that PLA is being used in a limited fashion throughout the system.

A number of administrative and programmatic challenges influence the successful expansion of PLA within the MUS System. These challenges include transferring PLA credits among institutions; documenting PLA credits on transcripts; funding implementation costs; training

faculty on PLA methods and philosophy; and promoting PLA opportunities to non-traditional students. In addition, before the use of portfolio-based assessment methods can be expanded, faculty and student perceptions on potential accreditation issues will need to be taken into consideration. For example, faculty may perceive that portfolios lack academic rigor, whereas students may perceive that the effort to complete a portfolio is too significant without a guarantee of receiving credit. This calls for increased education and awareness-building among faculty and target adults.

Proposed work funded through the Bill & Melinda Gates Foundation grant includes:

- Establishment of a PLA working group which is informed by the recent system survey and is represented by key stakeholders, with the goal to promote greater consistency and transparency throughout the state;
- MUS institutions document the awarding of credit by PLA method, and that a uniform process and format be developed by the MUS System Office with input from the PLA workgroup for collecting, recording, and reporting this data;
- MUS institutions offering portfolio-based assessment consider the CAEL Learning Counts.Org model (piloted by three MUS institutions beginning Fall 2014) or minimally begin offering a course for credit through which students can develop a portfolio, and that institutions collaborate to allow those courses that have already been created to be utilized by other MUS institutions;
- Via PLA workgroup, develop Board of Regents policy to make sure MUS institutions or departments ensure transparency regarding the academic and administrative criteria under which students may be awarded credit for prior learning when examinations or portfolios are not used;
- Recommend a standard MUS method or practice of transcript notation for credit earned through PLA be developed and adopted on a system-wide basis to create consistency across the MUS System and to help facilitate transfer of PLA-earned credits between institutions;
- The OCHE work in tandem with CAEL to provide faculty and staff training to ensure understanding of PLA approaches and practice;
- The PLA workgroup will identify best approaches to reach out to Montana's adults who may be interested in PLA;
- The OCHE develop a strategy to introduce PLA and encourage ongoing dialogue among faculty and the adult learning community; and MUS institutions that intend to increase PLA usage identify a student population that provides a good match with their institutional objectives and target their limited resources accordingly.

What are the greatest risks to your plans for transformation, in the context of the mapping?

Workload:

Faculty and staff workload (EdReady and PLA). Faculty and staff within the MUS are carrying significant loads and may, at times, feel overwhelmed with system initiatives and Board of Regents priority deadlines. It is important to focus the conversations and efforts around current initiatives such as the Developmental Education Taskforce, build on preliminary efforts that have already laid foundational information (CAEL's prior learning assessment survey), and system priorities of student access and success.

Change Paradigm:

As noted above, before the use of portfolio-based assessment can be expanded, faculty and student perceptions and understanding of PLA along with potential accreditation issues will need to be taken into consideration.

Part 4: Integration of Your Initiatives

- Reflecting on the work you identified in the previous section, how would you assess the overall level of integration? That is, are the initiatives complementary and working effectively toward your overall goals? As one way to think about this, if your Board and/or individual institutions were presented with your current list of initiatives, would they be able to see how the initiatives together constitute a transformation agenda?

Completion agenda is our overarching goal.

Integration of this work is centered on creating successful pathways for new students to becoming engaged with college level math as quickly as possible and engaging new adult learners and/or reengaging them- EdReady to address math deficiencies and PLA to encourage reentry and reduce costs/time commitments.

Integration is reflected very well with the current MUS Strategic Plan (http://mus.edu/data/StratPlan/1_Strat%20Plan_Intro.pdf) and System level priorities.

Strategic Planning Goals:

The MUS Strategic Plan is comprised of three primary goals that contain a series of sub-goal statements and objectives within each area.

Goal 1: Access & Affordability

Increase the overall educational attainment of Montanans through increased participation, retention and completion rates in the Montana University System

Goal 2: Workforce & Economic Development

Assist in the expansion and improvement of the state's economy through the development of high value jobs and the diversification of the economic base

Goal 3: Efficiency & Effectiveness

Improve institutional and system efficiency and effectiveness

Maintaining the high quality of our institutions and the education provided to our students is not listed as an explicit goal. This is because it is THE MOST IMPORTANT consideration for every goal and initiative of the Montana University System and is considered to be an integral part of every component of this strategic plan.

Finally, as noted above, in FY 13, the Commissioner of Higher Education formalized a standing statewide Developmental Education Council which was charged with implementing the recommendations from the former Developmental Education Taskforce including our ability to improve the System's ability to respond to students who arrive not ready for college level math or writing. The Taskforce mission was related to two goals within the MUS strategic plan: Goal 1 Access & Affordability and Goal 3: Efficiency & Effectiveness.

- For initiatives that are less connected, is there a type of innovation or body of work that could increase the linkages to other work and accelerate impact?

Both the PLA and EdReady initiatives provided within this report are very connected with the goals, strategic plan, and body of work of the MUS.

- Identify any exemplar institutions (or partners) pursuing transformational initiatives/ interventions/solutions at the campus level and whether they could be raised up to a system level (or diffused to other institutions in line with a similar system level transformation agenda) [This may already be answered in Part 2].

University of Montana EdReady pilot project.

In Summer 2013, MTDA and UM collaborated on an EdReady pilot designed to help students get into the college math course they need for their major interest. The Office for Student Success and Math Department at UM offered "*a FREE, personalized, self-paced, skill strengthening program called EdReady*" to students who fell into three categories:

1. You have not met the prerequisites the University requires for the math class which is best for your educational goals but your placement score was close to the required level and you feel you have the dedication necessary to be in this class.

2. You met the prerequisites, but it has been awhile since you took a math class or you narrowly accomplished the ALEKS cutoffs and are now struggling in the class.
3. You did not enroll in a math course this semester, but you wish to raise your ALEKS score so you can get into a higher math course in the Spring.

Students were asked to dedicate at least two hours a week to study and progress in their EdReady program. Holly Wright, Director of UM's Math and STUDY JAM Tutoring Programs, served as an Academic Coach for the pilot and was available to answer questions and provide any additional help.

The program ran for a total of six weeks, from July 15 through August 23. Students were recruited via email and accessed EdReady remotely, usually from home. Their progress was entirely self-paced.

The pilot offered five different EdReady pathways, corresponding to five different introductory math courses for different major tracks at UM. Students self-selected the track (and EdReady version) that most closely aligned with their college goals.

Each EdReady pathway had a custom assessment that was tailored to the expectations of the corresponding introductory course. The target score was pre-set to 90 in all cases. If a student reached the target score, that student had the option to take (or re-take) the ALEKS placement exam, and the new ALEKS score would be accepted for advising and placement purposes. A student who mastered an easier track also had the option to pursue a harder track to try to get an even higher ALEKS score.

Outcomes and Evaluation

A total of 72 students participated in the pilot. A number of students did not complete any activities after initially registering for an EdReady account, leaving 63 students for whom we had sufficient data to perform analyses. There were very few students in the Math 162 and 171 tracks, so we combined them in our analyses here. Finally, there were two students who did not reach the target score but re-took the ALEKS exam anyway and raised their scores. Those two students each logged over 10 hours of study time with the resources and raised their scores substantially, just not to the target. Because the time spent studying and some other activity data were not normally distributed, we use medians for most descriptive and analytic statistics.

Prior Learning Assessment:

During Fall of 2013 Montana's Office of the Commissioner of Higher Education was selected as one of three state systems to participate in CAEL's Lumina Foundation funded initiative to advocate for the adoption of prior learning assessment (PLA) policies, practices, and services—

and LearningCounts.org as one important method for getting PLA to scale in Montana. The intent is to increase adult student recruitment, persistence, and success. Three of Montana's campuses were invited via RFA to participate in PLA systems project to pilot Learning Counts.

The LearningCounts.org pilot project touches on MUS's Goal 1 that focuses on "access and success." The project will allow our three campuses to reach out to adult students in the state to provide access to those who may not have considered validating what (s)he may have learned on the job as practical learning that, in turn, may shorten the time to degree. This may also reduce tuition costs if a larger number of credits might be earned via portfolio assessment.

Part 5: Modeling the impact of your transformation agenda

- Please describe what improvements for graduation rate and/or degree production you might see from these initiatives (whether individually for your primary initiatives or collectively).
 - When do you anticipate seeing these changes?
 - Do you have any equity considerations for student populations?
 - What are approximate resource/costs associated with implementation?
 - Given this estimate, do you feel the system is on the path to achieve the goals referenced in Part 1?

While we do anticipate increasing student success we have not fully developed the plans and are not far enough along in the implementation process to answer Part 5. We hope to be in a much better position to answer this section as the grant is implemented between now and December 2014.

Note: We realize the goals set by your system are ambitious and perfectly modeling impact and costs is impossible. Estimates do not have to be perfect or detailed, but we want to start attaching some sense of numbers to these ideas or in-progress projects. Please do show through narrative, drawing, or Excel spreadsheet the overall impact you estimate, in the context of what given resources will be needed to implement these initiatives.

Part 6: Summary to share with other state systems

- Please provide a short summary (anywhere from a few paragraphs to a page is fine in length) to be shared with the other states that outlines your transformation agenda, including highlights of your initiatives and any potential key integration and modeling insights you might have discerned. This could be a simple summary of each of the prior Parts in this document (Goals, System Makeup, Initiatives, Integration, Modeling Impact).

Scaling EdReady Beyond Pilot

The primary objective of this portion of the project is to use EdReady as a catalyst for the development of a system-wide placement tool. This work will initially focus on the alignment of competencies throughout the Montana University System required of students for entrance into common course numbered remedial and gateway courses. The end goal is to position EdReady as a valid and consistent placement tool for key college gateway courses offered throughout the University System, regardless of the campus they offered on, thus delivering a consistent message of the expectations for college readiness in the MUS.

In the summer of 2014, initial work will begin on the process of competency identification and alignment in key math courses. A group of math faculty from the two flagship campuses (Montana State University and University of Montana) and select two and four year campuses in the MUS, will convene a working group under the guidance of the Developmental Education Council. This group will begin the process of delineating competencies needed for entrance into four or five key remedial and gateway math courses. Throughout the summer, participating campuses will also make EdReady available to students who are unsatisfied with current institutional math placement test scores. These pilot groups will also generated data to help inform the workgroup's efforts to establish an initial list of competencies.

In the fall of 2014, opportunities for continued pilot testing of EdReady will be explored and data from summer pilot studies will be further developed and analyzed. The small workgroup on competencies will be expanded to include representation of math faculty from all MUS campuses (including community colleges) and a definitive set of competencies will be established for the key remedial and gateway math courses. These new system-wide course competencies will be used to develop a consistent placement mechanism within EdReady that can be deployed in high schools and colleges throughout Montana.

Growing Adult Higher Education Participation PLA

More adults are exploring ways to increase and expand their skills and marketability in an effort to retain their current jobs as well as find employment and compete for higher-paying positions. For many adults who want to pursue these postsecondary credentials, the traditional structure and organization of higher education can pose significant barriers to access and to persistence and success.

During the implementation of the Lumina-funded College!NOW project in 2011, the Montana University System determined that a focus on expanding and strengthening lower cost, nontraditional educational options for adults was essential. The initial work performed included gathering information on target populations of Montana adults, exploration of

program design/redesign, and making follow up recommendations for future actions to open doors to affordable and practical educational opportunities for Montana's adult population.

The Montana University System is now in a position to explore Prior Learning Assessment as a vehicle to adult student success.

Proposed work funded through the Bill & Melinda Gates Foundation grant includes:

- Establishment of a PLA working group which is informed by the recent system survey and is represented by key stakeholders, with the goal to promote greater consistency and transparency throughout the state;
- MUS institutions document the awarding of credit by PLA method, and that a uniform process and format be developed by the MUS System Office with input from the PLA workgroup for collecting, recording, and reporting this data;
- MUS institutions offering portfolio-based assessment consider the CAEL Learning Counts.Org model (piloted by three MUS institutions beginning Fall 2014) or minimally begin offering a course for credit through which students can develop a portfolio, and that institutions collaborate to allow those courses that have already been created to be utilized by other MUS institutions;
- Via PLA workgroup, develop BOR policy to ensure MUS institutions or departments ensure transparency regarding the academic and administrative criteria under which students may be awarded credit for prior learning when examinations or portfolios are not used;
- Recommend a standard MUS method or practice of transcript notation for credit earned through PLA be developed and adopted on a system-wide basis to create consistency across the MUS System and to help facilitate transfer of PLA-earned credits between institutions;
- The MUS OCHE work in tandem with CAEL to provide faculty and staff training to ensure understanding of PLA approaches and practice;
- The PLA workgroup will identify best approaches to reach out to Montana's adults who may be interested in PLA;
- The MUS OCHE develop a strategy to introduce PLA and encourage ongoing dialogue among faculty and the adult learning community; and MUS institutions that intend to increase PLA usage identify a student population that provides a good match with their institutional objectives and target their limited resources accordingly.