

**Title II – Workforce Investment Act
Montana Narrative Report 2009-2010
December 2010**

Describe successful activities, programs, and projects supported with State Leadership funds and describe the extent to which these activities, programs, and projects were successful in implementing the goals of the State Plan.

State Data Quality/Program Improvement Conference: A statewide conference was organized as the springboard for the Adult Basic and Literacy Education (ABLE) programs to strategize for the ensuing program year. Sixty three participants, including program directors and designated staff, came together in September 2009 for the *Building the Power Conference*. The purpose of this conference was to provide professional development in the variety of program improvement strands that would be emphasized during the year. Each strand selected was to assist programs in strengthening their ABLE services to low-skilled adults. The strands were introduced in unique ways to keep participants engaged and enthused. It is the intent of the state to follow this conference format in succeeding years. It ensures that staff at all programs is apprised of the current work of the state with the expectation that program directors can select the areas in which their local programs will become involved and simultaneously have an understanding of areas of activity in which they are not participants. The strands featured this year were integrating content standards, incorporating career planning into the goal setting process, expanding distance learning, managing and monitoring data, organizing volunteers to make the community work for ABLE, and identifying the needs of an ESL student. A strong, effective adult education system will be the result of thoughtfully planned annual conferences.

Distance Learning: A major initiative for the 2010 program year was sustaining distance learning in programs that had incorporated distance delivery into their instructional delivery in the previous year and expanding to programs that had not applied to be distance learning providers. State support includes the purchase of Missouri GED Online and staff training, so in order to achieve the goal of sustaining and expanding a statewide distance learning delivery system a meeting was held on October 16, 2009. All existing providers and programs aspiring to be a distance learning provider were required to attend. The training included a review of Missouri GED Online which gave all participants the skills needed to navigate the program. Participants then moved beyond the basic navigation to discuss aligning curriculum, meeting learner needs, and research-based best practice ideas. Following the training, participants were required to submit a state application that included a description of community needs and data analysis to help target potential distance learning audiences. After determining who the potential audiences would be, the applicants had to describe what message would be conveyed to each audience and how ongoing communication and specific outreach activities would be maintained. The programs also had to identify the staff who would be involved in distance learning and how time and fiscal resources would be allocated to distance delivery. The next section of the application required a plan of implementation detailing all steps from orientation to exiting students. The last section of the application required all program directors to commit to adhering to the state distance learning policy and attend all required state-level distance learning activities.

Given the downturn in the economy, ABLE programs have been inundated with students. Programs have agreed that there are severe time constraints with the increased workload. Incorporating a distance learning delivery model has been problematic, as it is labor

intensive. Programs do not feel there is time to dedicate staff to distance learning. In spite of the immediate challenges, 88 students completed more than 51 percent of his/her instructional time using the distance learning curriculum for a total of 3,055 student learning hours. 11 percent of the distance learning students made an education gain. This data validates that distance learning is meeting the needs of some students, and it is incumbent upon the state to continue to support distance learning and to be flexible in defining the delivery model that will increase the number of distance learners.

Standards-In-Action: The Montana Adult Education Standards were completed in the summer of 2009. This was a major accomplishment. The standards clearly articulated what students need to know and be able to do, and they are the basis for a systemic approach to adult education. In 2010 Montana began working with the Standards-In-Action (SIA) project in order to ensure that the standards become the guide for all programs' instruction, not a document sitting in shrink-wrap on a shelf. Three regional SIA teams were organized, and team leaders participated in two national trainings. The leaders have successfully returned to the state and shared the knowledge and skills needed for successfully implementing the standards. The SIA Innovations have motivated and inspired the three instructional teams in a very short amount of time. Collaboratively the teams unpacked the standards, created sample activities, identified lead standards, and evaluated standards-based lessons. Additionally, these teams have worked creatively to overcome geographic barriers and integrated the standards-based instructional activities into a variety of program models (corrections, libraries, community-based organization, and school districts). Energy and enthusiasm have been demonstrated through an SIA blog, conference calls, and at each state meeting. Instructors continually validate the process has helped them become reflective practitioners who refer to the math standards to guide instruction and more effectively meet student learning needs. In the coming year, the state will support the team leaders in their continued participation in national training and state level work. This is a critical component of successfully transitioning low-skilled adults into the workforce and postsecondary.

Leadership Academy: Ten program directors applied to participate in a two-year Leadership Excellence Academy-Program Improvement Training, which concluded in May of 2010. The academy work included face-to-face workshops, online courses, Web casts, and technical assistance in completing a self-identified program improvement project. The directors began the project in October 2009 and continued their work until the spring of 2010. The second-year work focused on supporting instructional staff, being an effective leader, and student persistence. Four of the ten directors participated in all of the trainings, successfully completed all of the interim activities, and submitted their culminating activity, which has earned them the designation of being a "Certified Manager in Program Improvement". The state supported this project with the intention of developing a cadre of program instructors who will become empowered and excited about their work as instructional leaders and provide leadership for their professional peers. The ultimate outcome will be strengthening the leadership at the local program level, as program improvement is dependent upon good leadership.

Research-Based Instruction (Montana LINCS): MTLINCS has become the vehicle for providing statewide, ongoing support for research-based instruction and keeping all adult educators on the cutting edge of state and national activities. The state renewed its contract with a state ABE instructor, who has worked on the LINCS Web site since it began as a collaborative effort between the Northwest Consortium and the National Institute for Literacy (NIFL). The original site was developed to provide a variety of teacher/student resources. MTLINCS has evolved from a teacher/student resource center to become the hub for ongoing professional development linked to the state initiatives.

The homepage for MTLINCS now features a star with a link to the current program improvement initiatives (distance learning, data quality, content standards, ESL, and Leadership Academy). Each week an e-mail is sent to all ABLE instructors, directors, and volunteers providing links to new information in each strand. Upon opening a link, recipients will note a snippet of research on the selected strand with additional links to further resources and Web sites. All state activities related to each strand are posted. In minutes, readers can access Power Points, pictures, and relevant state documents from trainings and meetings. The importance of MTLINCS cannot be emphasized enough; it is the virtual faculty lounge that promotes research-based, ongoing professional development. The use of this site is steadily increasing; there was a 22 percent overall increase in use during the 2010 program year. Strands that saw the biggest increase in visits were content standards, ESL, and distance learning. In total there were 253, 082 visits to the Web site in the program year. MTLINCS is the foundation of professional collaboration in our ABLE system.

Montana Student Information System: Each program year a portion of the state leadership allocation is set aside to pay for ongoing maintenance and updates to the Montana Adult Basic and Literacy Education (MABLE) student information system that was built by state programming staff. MABLE is viewed as an evolving system that is continually updated and modified to meet the current needs of the National Reporting System (NRS) and the local programs. This flexibility was supported this year by sending state staff (ABLE director, ABLE administrative assistant, and a representative from a local program) to participate in the annual NRS training, *Diving Deep into the NRS Local Pool: Attendance, Education Gain and Transition Outcomes*. The Montana team worked through the data activities and determined that our data objective for the 2010-2011 program years would be to facilitate a shift from using MABLE for data entry to analyzing data for program improvement, transitioning students, and meeting required state targets. The action plan to achieve this goal included convening a state NRS task force, contracting with representatives from the American Institute for Research to conduct a statewide training for Montana adult education directors and staff, requiring a data action plan from each program, and scheduling a MABLE Users' Conference for mid-year to give everyone an opportunity to reflect on their action plan and collaboratively work with others to determine what modifications may be necessary to achieve their targeted outcomes and meet learner needs. The work started in 2010 focuses on strengthening the relationship between local programs and state staff. The state will work with representatives from local programs in creating data conference agendas and developing surveys to determine user needs. The state will provide scheduled opportunities to garner comments and suggestions for data system enhancements. Increased local level activity promotes ownership and interest in program level data, which will translate into improved student outcomes. This state level activity is the underpinning of all ABLE work, as valid and reliable data must drive all innovations.

Staff Training and Technical Assistance (TABE and BEST Plus): The state is committed to designating leadership dollars to comply with the state assessment policy's requirement. Each year all trained TABE and BEST Plus staff must participate in refresher assessment training. In order to make the best use of state resources and staff time, BEST Plus training was held in conjunction with the annual ESOL Conference in May 2010. 13 instructors participated, and it was the perfect transition into the two-day conference that followed. The training prior to the conference gave participants the background they needed to glean essential information presented at the conference. The TABE training was held in May for 27

participants. The TABE training provided participants the skills to return to their programs to refresh other staff members on the proper administration of the TABE test.

Performance-Based Funding: The swiftness in the development of the first performance-based funding (PBF) formula, the lack of communication with the field, and the fiscal impact on some local programs led to skepticism and concern over the Montana generated funding formula. In order to generate an equitable and defensible funding formula, Montana applied to work with MPR & Associates. In April 2010, work began with a representative group of program directors and an MPR team. At the first of two face-to-face meetings, MPR provided the task force with a deep understanding of the components of a funding formula and how to align these components with state funding priorities. At the second meeting the task force reviewed funding models, finalized funding criteria, outlined potential issues, and planned a systems roll-out. During the interim between meetings, the task force stayed in communication through conference calls, Webinars, and e-mail. This task force is creating an equitable funding formula that supports the states' priorities. Future funding allocations will reward local programs that are successfully meeting state defined needs.

State Directors' Meeting: The fourth annual state directors' meeting was held on February 17-18, 2010. State wide and local program data were reviewed. State goals, initiatives, assessment policy, formula funding, and program improvement strategies were agenda topics. All agenda items were related to the theme of transitioning students. The state will continue to bring the directors together annually, as the meeting is essential in assisting the directors in short-term and long-range planning. Annual meetings focus on the state initiatives and compliance with the federal law. Pride in adult education and local program improvement are the results of meetings that provide focused, relevant information.

Montana University System Writing Assessment Training: For placement into college level-freshman composition 80% of Montana high schools offer the Montana University System of Writing Assessment (MUSWA) to students. This assessment allows students to demonstrate writing proficiency. Because many of the Montana ABLE students do not successfully complete the GED essay on their first attempt, the state supported 24 ABLE instructors in attending the MUSWA Test Administration and Scoring Institute. The purpose was to assist instructors in preparing ABLE students for college-level English and writing at a level that is on par with current high school graduates. The state will continue to support this activity, as it also assists instructors with curricular planning and connects ABLE instructors with high school instructors and post secondary faculty. This links ABLE directly into the P-20 education system.

Program Site Monitoring: In order to begin a rigorous onsite data monitoring, the state developed four core Indicators of a Quality Adult Education Program. A site monitor was hired in April 2010 to review data entry procedures and document the validity of data at each local program. The four core indicator framed the data review process. Each program monitored was sent a follow-up synopsis and detailed notes on student files that were reviewed. Additionally, the programs were sent a state level synopsis so they could compare their report to the state wide report. In areas where the programs did not meet one of the four indicators, they were required to submit a corrective action plan. This year all twenty programs were visited, and over time the number of site visits will be determined by the previous year's data and desk monitoring. This activity reinforces the fidelity and integrity of the ABLE data.

Shop Talks: Monthly *Montana Shop Talks*, modeled after the *Shop Talks* conducted by the U.S. Office of Vocational and Adult Education for the state directors of adult

education, were held throughout the program year. Regularly scheduled talks involving the state staff and all program directors were used to disseminate information, promote instructional leadership, and provide technical assistance.

Integrated-Contextualized Learning: The state understands the importance of moving low-income adults along a career pathway. The three community colleges that have ABE programs on campus must lead the way for this to become a critical component of ABE instruction. To advance a contextualized learning model, the state supported the ABE director from Flathead Valley Community College (FVCC) to attend a Gates Foundation Institute in Washington State in May of 2010. The director has brought back an idea of how the I-BEST model could be modified and implemented in Montana programs. The director and faculty from her college are now working on an integrated learning project in the health care sector. At the conclusion of the 2010-2011 program years, the state will assist FVCC in sharing a contextualized learning model with other ABE programs.

The National Adult Education Professional Development Consortium (NAEPDC): NAEPDC continues to be a source of information and support for the state director. The connection to the NAEPDC has allowed the state director to learn from and network with colleagues both nationally and regionally on issues that are important for successful state administration. The benefits of this type of affiliation are increased confidence in running the state program and access to important information that can benefit the state.

Describe any significant findings from the eligible agency's evaluation of the effectiveness of the adult education and literacy activities based on the core indicators of performance.

The state is in year two of using the Web-based data system that will provide longitudinal trend data. The Web-based system requires similar assessment data for each student; this systemic approach for measuring students' academic need has necessitated changes in instructional practice, intake, and goal setting. However, instructors now have a clear understanding of what each student will need in their learning plan. The chart below shows the percentage of students making an educational gain in program years 2008-2009 and 2009-2010. There is a considerable drop in the number of students attaining an education gain in 2009-2010 due to the state's new requirement that all students have 60 hours of instruction prior to a post test. Prior to this year, programs were allowed to post test after twelve hours of instruction if the student was about to exit the program or the instructor determined the student had made significant gains. Data shows adherence to the 60 hour requirement has decreased the number of post tests that have been administered and negatively impacted our ability to meet current performance targets.

<u>Entering EFL</u>	<u>PY 08-09</u> <u>Table 4</u>	<u>PY 09-10</u> <u>Table 4</u>	<u>PY 09-10</u> <u>Table 4B</u>
ABE Beg Lit	47%	31%	79%
ABE Beg Basic	33%	26%	70%
ABE Int Low	40%	23%	70%
ABE Int High	34%	20%	61%
ASE Low	46%	18%	62%

The state and local programs anticipated this decline, and in order to address this challenge, all programs were required to develop and submit a plan describing how they can increase educational gains in the upcoming year. The following list highlights the proactive steps the programs are taking: scheduling bi-monthly staff meetings to analyze data, ramping up efforts to contact stopped-out students, transitioning to managed enrollment, organizing MABLE training for all staff, exiting students that do not attend regularly, scheduling regular student conferences, incentivizing attendance, integrating career planning, running monthly primary area of instruction reports, developing a 60-hour marketing plan, creating relevant curriculum, adopting procedures for informing students of expectations, generating a student survey to garner information that can assist in modifying the instructional delivery model, and collecting data to correlate retention and hours of attendance. This list demonstrates all programs' commitment to changing the mindset of staff and students; it is a paradigm shift that will better serve students and meet federal requirements.

Montana's ESL population remains very small, and the number of students in each functioning level varies significantly from year to year. Data does validate that the 60 hour rule has also impacted educational gains for a large number of ESL students. The list of proactive steps to improve education gains for ABLE students is the same for the ESL instructors.

<u>Entering EFL</u>	<u>PY 08-09</u> <u>Table 4</u>	<u>PY 09-10</u> <u>Table 4</u>	<u>PY 09-10</u> <u>Table 4B</u>
ESL Beg Lit	44%	38%	69%
ESL Low	67%	44%	100%
ESL Beg High	56%	39%	78%
ESL Int Low	45%	43%	75%
ESL Int High	65%	47%	79%
ESL Advanced	49%	25%	59%

Table 4B documents Montana readily meets performance targets when students have participated in 60 or more hours of instruction.

The outcomes in the core areas are listed in the table below.

<u>Outcome Measure</u>	<u>PY 08-09</u>	<u>PY 09-10</u>
Entered Employment	36.7%	46%
Retained Employment	80%	65%
GED or Sec Diploma	62.1%	60%
Post Secondary	51%	61%

Data indicates the heightened awareness of the importance of goal setting beyond GED attainment may account for the increase in performance for entering employment and postsecondary. The drop in retained employment can be attributed to the current recession; a pending job loss drives many individuals to seek ABLE services while still employed. As more students identify core goals beyond attaining a GED, programs must

determine how to assist students in attaining these goals. Since the ABLÉ mission is to help transition students beyond the GED to postsecondary education or the workforce, the state will continue to examine the selection of core goals and the performance outcomes. Transitioning students beyond the GED will continue to be a focus for the next program year.

Describe how the eligible agency has supported the integration of activities sponsored under Title II with other adult education, career development, and employment and training activities. Include a description of how the eligible agency is being represented on the Local Workforce Investment Boards, adult education's involvement on the State Workforce Investment Board, the provision of core and other services through the one-stop system and an estimate of the Title II funds being used to support activities and services through the one-stop delivery system.

State Workforce Investment Board (SWIB): The State Superintendent of Public Instruction, Denise Juneau, has appointed the division administrator of the Career, Technical and Adult Education Division as a full voting member of the State Workforce Investment Board (SWIB) representing ABLÉ. The state ABLÉ program director was appointed by the governor in January 2008 to serve on the Youth Council, which is part of the SWIB Committee System. The Youth Council is responsible for coordinating and researching the most current work force information related to youth education and employment for the purpose of making recommendations to the SWIB. The Youth Council holds quarterly meetings designed to augment the vision and mission of the SWIB, and in March of 2010 the state ABLÉ director was selected as vice-chair of the Council.

Montana Career and Technical Education Advisory Council: The state ABLÉ director was selected in 2010 to serve on the Career and Technical Education Advisory Board which provides advice and counsel on career and technical education programs funded through Perkins IV.

One-Stop Delivery Systems: Although only one ABLÉ program is housed in a one-stop delivery system, the remaining programs have established strong relationships with the one-stops in their community. Due to the small size of all Montana communities, all adult education programs are able to operate as though they are part of a one-stop delivery system. The flow of information and students between agencies is seamless and continuous. Current partnerships sustain formal and informal communication and the sharing of resources among the agencies. Students are served efficiently and effectively. This collaboration gives our students the support they need to be successful. One-stop delivery is embraced conceptually in Montana and is in action on a daily basis. ABLÉ's role in the one-stop delivery system has been validated by its presence being required on the governor's Rapid Response Team. The governor has called for monthly meetings where the heads of all the state agencies come together to discuss how the needs of the individuals losing employment can best be met. The ABLÉ state director is consulted regularly to discuss agenda items and to share information that is needed to help transition unskilled and low-skilled adults to the workforce.

Shared Youth Vision Task Force: The Shared Youth Vision (SYV) task force was formed in 2007 to bring federal agencies serving the neediest youth together to coordinate and integrate services. The SYV core team (ABLÉ director, Job Corp director, WIA

Youth Coordinator, and Youth Corrections director) continued to meet during this program year to build a framework for a state wide vision and to keep the SYV moving forward. After asset mapping and consulting with partner agencies, it was determined the state must coordinate an aggressive, dramatic outreach campaign to increase the number of GED's attained by our neediest youth in order to remedy the ongoing negative economic impact that dropouts have on the economy. To achieve the goal, the core team held monthly meetings and telephone conference calls to prepare an action plan. Armed with the pledged support of the numerous agencies, a completed white paper, and a formal action plan, the Shared Youth Vision core team presented its goal and action plan to the Youth Council at their March 2010 meeting. At the conclusion of the presentation, the Youth Council voted to request funds from the governor's discretionary fund for implementing the proposed action plan. Between April and June, proposed marketing materials were developed and distributed to youth being served by state agencies. They were asked to vote on the marketing package that would be most appealing to youth. The final marketing package will be presented to the SWIB at the 2010 fall meeting and the Youth Council will be asking for support of a 2011 campaign launch.

Elevate America: Montana ABLE programs participated in the Governor's Microsoft Elevate America Campaign during the months of June and July. The selected state agencies provided access to state citizens that applied for an e-learning voucher to complete an online certification. This demonstrates that the Department of Labor sees ABLE as a partner in workforce development.

WIA Incentive Grant (WIG): At the conclusion of the 2007-08 program years, the Department of Labor, Adult Education, and the Office of the Commissioner of Higher Education had finalized their goal for the recently awarded WIG. Developing a plan to enhance the infrastructure for services designed to enable unemployed/underemployed adults to gain the skills necessary to attain self-sufficiency and move up the economic ladder was identified as the collaborative goal for this grant. Through a series of meetings early in the 2009-2010 program years, representatives from each agency determined that the most effective way to accomplish the goal was to coordinate client/student services. Each agency agreed that client/student retention and completion of self-identified goals were the major problems facing each agency. The team determined a common intake activity could be found and shared across the agencies, duplicity of intake activities and assessments would be eliminated. Through a common intake activity, clients/students would seamlessly transition between agencies, which would lead to personal empowerment rather than discouragement. The common intake activity would assist each client/student in the development of a personal employment plan, and the process was named PEP Talk. To bring PEP Talk to life, the team agreed that the Montana Career Information System (MCIS) would be the hub for sharing client/student information. No matter what the point of entry (ABLE, higher education, or job service); MCIS would be the starting point for each client/student to create and store a transferable, electronic portfolio. Every client/student now has access to the same training modules to assist them through a three-step process. The process moves each person through skills awareness, career exploration, and finally the planning/implementation process. Each step of the process is electronically saved, so the client/student works at their own pace in developing their academic and employment plan. At the conclusion of the 2010 program year representative staff from various agencies was trained in the PEP Talk process and the transferability of student plans between the agencies. In the spring of 2010, a PEP Talk facilitator was hired to meet with regional providers to discuss how PEP Talk could

best be implemented in each region. At the conclusion of ten regional meetings, a PEP Talk Best Practices paper was written and distributed to all state agencies so providers could glean ideas from each other. PEP Talk is the beginning of developing Career Pathways for adults in Montana. PEP Talk has been featured in the State Department of Labor newsletter and in radio public service announcements. Links to PEP Talk are on all state agency Web sites that are involved in workforce development.

Describe successful activities and services supported with EL/Civics funds, including the number of programs receiving EL/Civics grants and an estimate of the number of adult learners served.

Five programs have been awarded the EL/Civics grant. Each year the number of students served with this grant remains small and relatively constant. This program year served 231 students. Historically, these programs work diligently to use these funds to serve their adult students in the most effective manner. However, beyond BEST Plus training, the instructors have received little state professional development support. Instructors have worked independently, pursuing individual professional development activities with no opportunity for dialogue and sharing with their professional peers. There was no systemic support for ESOL instructors. This prompted the state to apply for support and guidance from the Center for Adult English Language Acquisition (CAELA) Network for technical assistance in planning professional development for instructors working with English language learners. The state was notified in June 2008 that the OPI had been awarded the opportunity to work with CAELA staff in a professional development planning process that would meet the needs of the instructors and students in Montana. Over the course of two years, a state CAELA team (ABLE state director, two ESOL instructors, and a program director) has collaboratively worked with staff from CAELA to develop and implement a long term state plan for professional development. The work with CAELA began in July 2008. The state CAELA team met with Sarah Young and Lynda Terrill. Over the course of two days, the team analyzed data and discussed potential professional development needs. The state team ultimately identified three focus areas for professional development: a) the need to collect background information to help assess professional development needs; b) the need to plan and implement the state's first ever conference for ESL practitioners (informed by the survey results); and c) the need to plan and implement conference follow-up activities for participants to directly apply and reflect on the knowledge and skills learned to improve their instructional practice. The survey for ESL instructors and program directors was developed and completed in September or 2008. The results of the surveys were used to inform the next steps for a new professional development system. Through e-mails and conference calls, Sarah Young and the Montana team discussed survey results, and the specific needs of the field were identified. An ESL professional development plan was completed. The team has continued to meet via telephone calls and in May 2010 the second annual Montana ESOL Conference was attended by 29 practitioners and program directors. The conference continued with on five strands that were presented at the first conference: 1) Who are adult ESL students? 2) What is an effective adult ESL instructor? 3) How are languages learned? 4) How can technology be used in adult ESL? 5) What is effective multilevel instruction? This conference included a practitioner panel as a first step in bringing more local instructors into leader roles. Each participant was asked to submit a follow-up reading and lesson plan reflection that was posted on the MTLINCS Web page in September 2010. The assignments are posted under the appropriate strand, so all ESL

instructors can read and benefit from the work of the colleagues. The intent of the Web page is to develop a learning community with ongoing professional support.

The state supported the CAELA team members in their leadership role by helping fund a trip to Washington, DC to collaborate with other CAELA teams and bring back new ideas for future conferences and professional development activities.

Through our work with CAL, the Montana CAELA team is engaged in a thoughtful professional development process that will enhance instructors' abilities to meet the needs of ESL students and create a statewide ESL system that can prepare the ABLE programs to meet the demands of this growing population.