

# The Montana Story

## Providing Support to Frontier Communities Through State Oversight, Embedded Coaching, and Community Engagement

*Prepared by Julie Corbett of Corbett Education Consulting for the Center on Innovation & Improvement*

As State Education Agency budgets decrease, state education leaders must develop strategies to do more with fewer resources. Leaders must determine which strategies and supports are the most effective for schools in improvement, how to build capacity with fewer staff at the district and state levels, and how to best communicate with individual schools and districts. Combining strong state oversight with an emphasis on community engagement and capacity building through the provision of coaches creates an improvement effort that spreads far beyond the school building.

As the 2010–11 academic year closes, it is important to reflect on the strengths and weaknesses of strategies and policies implemented over the course of the year. An increased amount of federal School Improvement Grant (SIG) funds were distributed in 2010–11, and it is imperative to learn from the early experiences implementing the four federal school improvement models (turn-around, restart, closure, and transformation). SIGs have been allocated to fund state school improvement efforts since 2007, and the 2010 federal guidance included several new requirements. States and districts have worked to improve schools for years, but these new mandates significantly raised the bar by requiring new oversight roles at the state level and increased implementation capacity at the district and school levels. As a result, most state education agencies are building the plane while flying. It's too early to identify best practices, but there are some promising practices emerging in the field.

When the revised SIG guidance was released, Montana's Office of Public Instruction (OPI) addressed different questions than many other states. Most importantly, how can a federal grant program that includes four improvement models, three of which are not very feasible in Montana, be adjusted to meet the federal requirements and the state's needs at the same time? Other crucial questions included: In a state with such small communities that are so spread out, how can services be provided with enough frequency and quality to make a sustainable difference? How can the state education agency navigate the sometimes conflicting bureaucracies of the federal government, the state government, and the tribal councils of the American Indian reservations? Since it is so difficult to bring external partners into more rural districts, how can capacity be built within the schools, divisions, and communities? This brief highlights Montana's emphasis on leading school improvement efforts from the state education agency, coaching school and district staff, building local capacity, and engaging the community throughout the process. Through interviews with state education agency leaders and the analysis of a variety of OPI-created tools and documents, the promising practices in Montana are separated into two main categories:

- Clarity, Accountability, and Focus from the Top Down, and
- Embedded Coaches in the Field.

### CONTEXT & BACKGROUND

In 2010, Montana received slightly more than \$11.5 million through the SIG program to raise student achievement in the state's persistently lowest-achieving schools. The funds are part of the \$3.5 billion in school improvement funding for states in the 2009 federal budget and the American Recovery and Reinvestment Act.

Like all states, districts in Montana must implement one of the following four federally defined improvement models in their persistently lowest-achieving schools:

- **Turnaround Model:** Replace the principal, screen existing school staff, and rehire no more than half the teachers; adopt a new governance structure; and improve the school through curriculum reform, professional development, extending learning time, and other strategies.
- **Restart Model:** Convert a school, or close it and reopen it, as a charter school or under an education management organization.
- **School Closure:** Close the school and send the students to higher achieving schools in the district.
- **Transformation Model:** Replace the principal and improve the school through comprehensive curriculum reform, professional development, extending learning time, and other strategies.

Montana is more aptly described by the term “frontier” than “rural.” The state ranks fourth in area, but 44th in population, and has the third lowest population density in the United States. The state is divided by numerous mountain ranges, yet 60% of the land is prairie, and seven American Indian reservations are located within the state’s borders. The geographic features of the state present a set of logistical challenges for the provision of services: it is difficult to recruit external partners or contractors to come into the state to work; it is especially difficult to find partners to work in the most remote areas; and the state staff, based in Helena, must drive up to nine hours to reach various communities in the state.

### Beginning the SIG Process

Based on federal guidance, the Office of Public Instruction (OPI) leadership team analyzed student performance data and determined the lowest-performing schools in the state in the early spring of 2010. All seven schools on the persistently lowest-performing list were located on American Indian reservations and in some of the most remote locations in the state. With these geographic barriers and the revised SIG requirements, Montana’s Superintendent of Public Education, Denise Juneau, and her staff realized that significant changes at OPI were necessary.

The leadership team compared the circumstances in the SIG-eligible schools with the federal guidelines and then adapted the SIG program to better meet Montana’s needs. Barriers to the planning process were almost immediate; three of the four improvement models were not viable options within the state for a variety of reasons.

- **Restart Model—**There are few educational management organizations that already work or would want to work in these extremely remote areas, and few organizations would have the skill-sets necessary to meet the social-emotional and community needs of the reservations.
- **School Closure—**Closure is not an option; there are no alternative schools for the students to attend in these districts. Most of these districts have one elementary, one middle, and one high school. In some cases, one building houses the elementary, middle, and high schools, as well as the district office.
- **Turnaround Model—**Removing half the teaching staff of a school is not feasible; it is already extremely difficult to recruit teachers to these areas and schools in the first place.

The transformation model was the most viable model; yet removing the principal was still a large sticking point, as finding qualified local replacements would be problematic. The district offices of these schools have limited capacity with few staff members and it was unlikely that simply giving the low-performing schools a sum of money would produce immediate or sustainable results. As a result of this limited capacity and a lack of external partners, OPI developed a unique coaching model, run by the state, that targets services and capacity building at the local level (more detail on the coaching model starts on page 8).

Historically, eligible Title I schools applied for SIG money, and if OPI approved the plan, money was released to the districts. The district would then be responsible for implementing and demonstrating improvements and there was limited contact, ranging from one to two times per month, between OPI and the local districts. This time, OPI recognized that these districts and schools would be incapable of carrying out their own reforms. In order to compensate for these needs, Montana’s SIG model allows the state to hold onto the federal dollars and sends coaches and other supports

The Numbers	10-11	11-12
Tier I Schools Eligible for SIG Funds	7	8
Schools Applied for SIG Funds	7	TBD
Schools Receiving SIG Funds	6	TBD
Districts Receiving SIG Funds	4	TBD
High Schools	4	TBD
Middle School (7–8)	1	TBD
Elementary School (K–6)	1	TBD

out to the schools to guide implementation and increase capacity at the local level.

Once the seven lowest-performing schools were identified, the state superintendent and a handful of her staff members went out to five communities (three schools were in one district) to explain the opportunity presented by SIG funds, and why their schools were selected. The OPI team met with each community's stakeholders, including the local school board, administrators, teachers, students, parents, community leaders, tribal colleges, tribal councils, and the county administrators. Despite knowing that the schools were not exemplars, the discussions were difficult, and some communities had a hard time acknowledging and accepting that their schools really were the lowest-performing schools (out of over 820 schools) in the state.

During the community meetings, the attendees were divided into groups to brainstorm causes of the low performance and to problem-solve potential solutions. OPI leaders described the requirements of the grant, and emphasized OPI's desire to enter into a partnership with the local districts, as opposed to forcing changes. Having the state superintendent and the president of the state teacher's union (a combination of the Montana Federation of Teachers and the Montana Education Association) facilitate the meetings with representative teachers and encourage community participation created a joint message and ensured that the local communities and teachers understood the importance of the work ahead of them. Most meeting attendees also realized that they needed assistance to improve.

Despite the fact that the US Department of Education (USDE) had not yet approved Montana's SIG model, OPI took a leap of faith after the community meetings and brought the local district teams together to start planning. Dr. Sam Redding, director of the Center on Innovation & Improvement, and staff from the Northwest Regional Comprehensive Center met with district representatives at a statewide symposium on school improvement to further explain the purposes and requirements of the SIG program. Once OPI had federal approval, the state moved forward and created Implementation Agreements with the schools and districts (see page 7 for more detail on the Implementation Agreements). If a school wanted to apply for SIG funds, but refused to sign an Implementation Agreement, it was allowed to submit a more traditional application for SIG funds. Six of the seven schools signed the Implementation Agreements, and one school submitted a traditional SIG application (and was ultimately denied grant funds due to the lack of comprehensive and intense plans for improvement). The six SIG-funded schools are part of a larger set of schools in Montana called Montana's Schools of Promise, as they

have the potential to provide students a high-quality education and the ability to make positive changes in their communities.

## **PROMISING PRACTICES**

### **Clarity, Accountability, and Focus from the Top Down**

#### ***Process Overhaul***

Once the SIG Management Team realized the extent of the problems and the lack of capacity in the identified districts, the team created an improvement process, essentially from scratch. In addition to designing the system of support and the improvement process for the Schools of Promise, past improvement efforts had included only a limited role for part-time school coaches from OPI, and the state education agency lacked capacity in its ability to fully oversee, monitor, and guide the improvement process at the local level. OPI leaders created the full-time, on-site coaching model to address the limited capacity in the schools and districts, but they also acknowledged that there would be a significant learning curve within the state education agency as well. Additional positions at OPI were created to help address the needs at the state level (see page 4 for more information on the organizational structure at OPI).

As opposed to creating new models and tools, the team modified existing improvement and intervention tools and practices from other states and organizations to meet Montana's needs. Washington State, Mass Insight Education & Research Institute, and the Center on Innovation & Improvement provided many of the tools and models that Montana adapted for the Schools of Promise.

While discussing action steps and nonnegotiable conditions, the OPI staff members each selected different priorities and created different timelines for implementation. Remedying this lack of focus and clarity of priorities became a central goal of the planning process. The team realized that they all had to be on the same page at OPI and must present the same vision and set of priorities to the local teams. The Indicators of Success document was created, with support and guidance from the Center on Innovation & Improvement and the Northwest Regional Comprehensive Center, to address this concern at OPI and in the local districts (see page 5 for more information on the Indicators of Success).

Members of the SIG Management Team learned a great deal about themselves and OPI as an organization over the first year of the revised SIG program. They also understand that, as the needs of the Schools of Promise evolve, the skills and supports at OPI will need adjustment as well. For example, in 2010–11, much of the

improvement work centered around creating an infrastructure for the school and the district and changing the culture of learning. In Year 2 (2011–12), the Schools of Promise will focus on instruction, building relationships, and increasing collaboration within the community. Year 3 will focus on sustainability, embedding practices, and transferring the responsibility for improvement to the community. As the focus areas change, the coaches' roles will adjust, and the supports provided by OPI will need to change as well.

**Annual Focus Areas for the Schools of Promise**

Year 1 (I do—OPI staff models for school and district staff):

- OPI models the best practices and school/district staff work alongside OPI coaches and leaders.
- Focus on developing infrastructure, establishing processes and procedures, increasing student engagement (student lounges, after school programs), changing culture and building relationships to show that change is possible, and launching new Reading/Language Arts and Math programs.

Year 2 (We do—OPI and school or district staff work together):

- OPI and school/district staff develop shared leadership and increase collaboration.
- Focus on enhancing instruction; using differentiated instruction, data analysis, and RTI; coordinating the curriculum with the assessment cycle; aligning the curriculum to the standards; and intensifying community engagement and relationships.

Year 3 (You do—school and district staff take the lead with feedback from OPI):

- School and district staff lead efforts, and OPI staff observe, monitor, and offer feedback.
- Focus on embedding the changes, developing practices to ensure sustainability, exploring what it means to be a public school on an

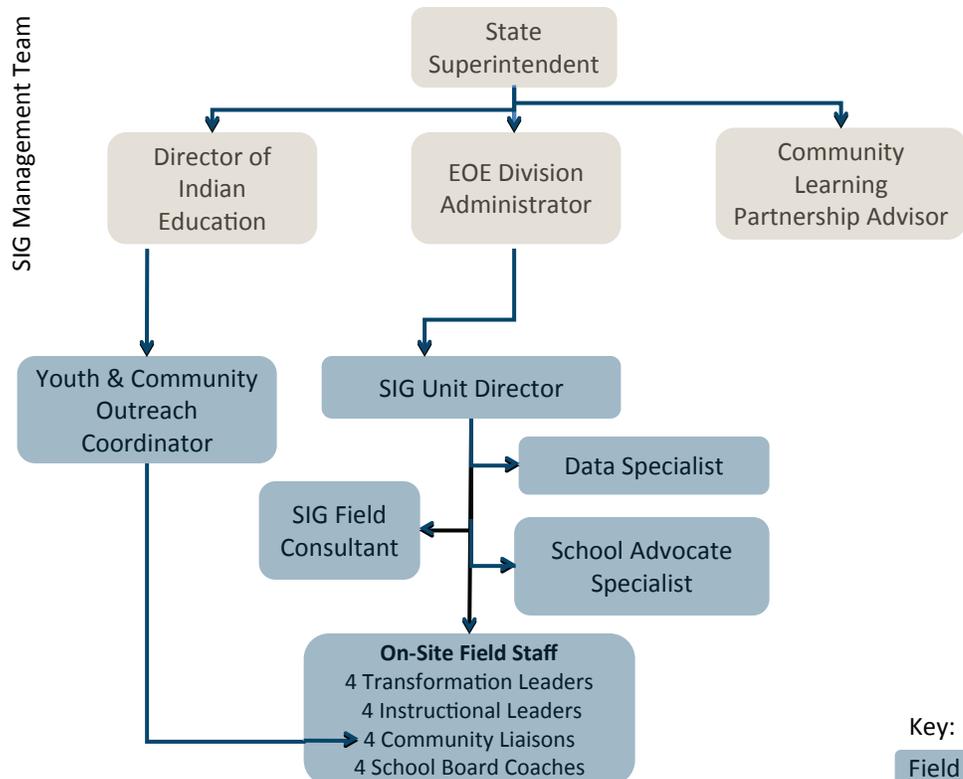
Indian reservation, continuing to intensify supports for community relationships and partnerships, and developing shared accountability within the community.

**Revised Organizational Structure**

The SIG Management Team at OPI consists of the State Superintendent, the Director of Indian Education, the Title I Director (EOE Division Administrator), and the superintendent's policy advisor (Community Learning Partnership Advisor). The Management Team meets regularly to discuss progress, problems, and changes for the current and upcoming year. The entire SIG team also includes the SIG unit director, a field consultant, and several other OPI staff members who are based in other divisions (i.e., data management, American Indian community outreach), and the four field staff (coaches/leaders/liaisons). The SIG team (field staff on organizational chart) meets weekly to plan for the upcoming week, resolve problems, and discuss how to best support the needs in the field.

A SIG Unit Director, hired in July 2010, oversees the day-to-day needs of the six Schools of Promise, as well as the OPI staff working in those schools. The Director coordinates OPI staff members working with the schools and guides the coaches through the improvement process. Before the position was created, there were few formal documents or processes to lead the full-time on-site improvement work; much of the first

**OPI's SIG Organizational Chart**



several months of the Director’s employment were spent developing policy and procedure manuals for the coaches (links to many of these documents are included in the reference section).

Because seven American Indian reservations are located in Montana, there is a state constitutional mandate to provide culturally relevant curriculum and services to all American Indian students. The Youth and Community Outreach Coordinator, who reports to the Director of Indian Education, supervises the community and youth engagement work in the Schools of Promise and guarantees that American Indian cultures are highlighted and maintained throughout the improvement efforts. Since the community is such a large part of the improvement process, ensuring that all OPI staff understand and promote the cultural needs of the community will likely result in stronger and more sustainable results.

In comparison to improvement efforts in other states, the OPI staff-to-student ratio for SIG funded schools is extremely low. OPI’s SIG Management Team believes that this low ratio is necessary to make the needed changes in these schools and communities based on the needs and the geographic limitations of these communities. As the three-year influx of school improvement funds decreases and the capacity at the local level increases, it is likely that the roles and intensity of the OPI on-site field staff would decrease accordingly.

Many of the OPI central office staff members, who provide oversight or services to the improvement efforts, are not allocated to the Schools of Promise full time, but also have numerous other responsibilities within the agency. The SIG Management Team committed large amounts of time to get the SIG efforts off the ground

in 2010. As one OPI administrator reflected, “We were stretched to the max, but we’re not going to stand by as an SEA and let another generation of students pass by. Changes are needed now, and we’re responsible for making those changes happen.”

All OPI SIG staff members regularly work with non-SIG-focused divisions and specialists in order to meet the Schools of Promise’s individual needs. While some state education agencies are unwieldy and division staff can be territorial, there is a clear understanding in Montana that everyone is working for the betterment of the students, and that collaboration from the top (OPI’s leadership) to the ground (the local communities) is necessary. This level of coordination at OPI models the type of coordination and alignment needed, and that is developing, in the districts.

**Indicators of Success**

Once the improvement efforts were underway, it was clear that additional monitoring documents were necessary to track progress and note areas for improvement. Using the Readiness Triangle, created by Mass Insight Education & Research Institute, OPI developed Indicators of Success for each of the three readinesses (to act, to teach, and to learn). Each readiness includes multiple categories related to school operations and management and is further broken down into specific strategies and the requirements of the federal transformation model. A timeframe for implementation of each indicator is included to assist with the overall improvement planning process, (i.e., the principal should be replaced during the first quarter of the intervention, and the District Leadership Team will meet monthly throughout the three-year effort).

**Indicators of Success**

Readiness to Act	Readiness to Teach	Readiness to Learn
<ul style="list-style-type: none"> <li>■ Administration</li> <li>■ School Board</li> <li>■ Finance</li> <li>■ Team Work</li> </ul>	<ul style="list-style-type: none"> <li>■ Comprehensive Instructional Reform Activities</li> <li>■ Professional Development</li> <li>■ Team Work</li> <li>■ Student Data</li> <li>■ Technology</li> <li>■ Teacher/Principal Evaluation &amp; Incentives</li> <li>■ Special Education</li> <li>■ Paraprofessionals</li> </ul>	<ul style="list-style-type: none"> <li>■ Student Safety</li> <li>■ Student Well-Being               <ul style="list-style-type: none"> <li>• MBI (Montana’s version of PBI)</li> <li>• IERS—trauma</li> <li>• Health &amp; Mental Health</li> <li>• Youth Support</li> </ul> </li> <li>■ Family &amp; Community Engagement</li> </ul>

The Indicators of Success guide the school improvement process, ensure that the federal requirements are met, and prioritize action items for the local teams. When the on-site OPI staff first began work with the local teams, there was some confusion about what steps were most important and the order of implementation. The Indicators of Success help clarify the timeline and the priorities for the entire improvement effort from Helena to the field.

### ***Community Focus***

Social problems infiltrate the four communities where the Schools of Promise are located. Some of the most predominant social issues include: a lack of higher education or employment opportunities; high levels of domestic violence, poverty, substance abuse (especially alcoholism), and suicide; and isolation from social-emotional services and other community-based organizations present in many impoverished urban environments. Similar to other rural communities across the country, regardless of the quality of education, the schools are viewed as the center of the community, and any changes to the educational system impact a large portion of the population and are often highly controversial. Due to the importance of the schools in the community and the high number of social problems, community engagement must be a central feature of the improvement efforts.

Engaging the community began at the community meetings in spring 2010, and OPI continued building upon that engagement throughout the 2010–11 school year. OPI leaders understand that the influx of SIG funds is temporary and that, in order to create sustainable changes in the schools, the communities must also be empowered. During some of the initial community meetings, State Superintendent Juneau stated, “After these meetings are over, I go back to Helena, but you live here. These are your children, and we’ll help make the changes, but you’re the ones who have to do this work.”

In addition to community engagement, Montana is developing additional wraparound support services into the schools. Primary and secondary trauma services for the students in these schools, and also for the teachers and staff members working with the students, will be provided through a partnership with the University of Montana. Similar to high-poverty urban environments, teachers in these schools burn out quickly because they lack coping strategies for themselves and there are not sufficient staff or programs addressing the needs of students undergoing significant issues at home. The SIG funding from USDE was already allocated to pay for the coaches and a variety of other needs, so OPI applied for, and received, an additional \$609,713 from The Montana

Mental Health Settlement Trust to cover this trauma work.

The community empowerment piece will be further developed in Years 2 and 3 of the improvement effort. OPI strives to achieve a level of interdependence and collaboration between the various stakeholders and government entities that continues after the coaching intensity is reduced. The tribal councils, community-based organizations, the federal government, and state institutions must work together to align efforts and combat some of these social problems as one force. By Year 3, the hope is that this collaboration and alignment will become the new norm for all projects or services in the communities.

While community engagement is part of each on-site field staff member’s work stream, some of the most promising anecdotes from 2010–11 are emerging from the work of the community liaisons. These specialists encourage better communication and understanding between teachers, parents, and students by teaching school staff how to perform home visits. After these visits, teachers understand the external constraints on the students; students learn that their parents do want them to do well at school; and parents, who likely had poor experiences with school themselves, understand how to access the school system, how to communicate with teachers, and how to better support their children. OPI will also work with the Montana Parent Information and Resource Center (PIRC) and the Academic Development Institute (ADI) to adapt and implement ADI’s Solid Foundation program for building strong school communities in Year 2.

The state superintendent and her staff completed a road trip in fall 2010 to give each of the schools a pep talk and to kick off the school year. They will head back out in spring 2011 to check in on all of the communities. Maintaining the connections and communication from the state level down to the ground remains a priority for all members of the SIG Management Team.

### ***Shared Accountability***

From the onset of planning, Montana leaders knew that shared accountability must be entrenched in the entire improvement process. The local teams needed to be part of the solution, but they lacked the capacity to do the work on their own. To address both the goals of SIG and the needs of the communities, Montana developed Implementation Agreements and Memorandums of Understanding (MOU) for each of the districts. These two contracts clearly outline the purpose of the SIG funds, that OPI would maintain the funds, that services and coaches would be provided to the districts and Schools of Promise, and that the teachers’ association

acknowledges changes to the existing collective bargaining agreement.

### Memorandum of Understanding

The MOU is a document that outlines the relationships between and the responsibilities of the local school board and the local education association (teachers' union). The MOU defines the terms and conditions of the SIG program and supersedes any related contractual language in the existing Collective Bargaining Agreement. The document expires June 30, 2013.

### Key Provisions of the MOU

#### Labor/Management Leadership Team

- A SIG Labor/Management Team that makes all decisions and resolves issues related to SIG, labor issues, and working conditions will be created.
- District and the teachers' association each appoint four members.
- The team must develop group and/or individual rewards based on classroom or schoolwide improvement in achievement, attendance, and/or graduation rates.

#### Professional Compensation

- Teachers are paid a prorated salary for any time worked beyond the contractual day or year.

#### Professional Development

- Teachers must participate in specified professional development workshops/trainings.

#### Teacher Evaluation

- Create a new evaluation instrument.
- Hold pre-evaluation conference between teacher and evaluator.
- Evaluator observes teacher through "announced" and "unannounced" observations.
- Areas of evaluation include: planning and preparation, classroom environment, instruction, professional responsibilities, student improvement.
- Evaluator submits a post-evaluation report to teacher, schedules a conference to discuss the observations, and prepares a final evaluation report.
- Non-tenured teachers receive two evaluations per year; tenured teachers have one annual evaluation.

### Implementation Agreement

The Implementation Agreement is the main contractual document for the partnerships between the districts and OPI. The Implementation Agreement establishes "a framework for collaboration between the District and OPI, as well as [articulates] the roles and responsibilities in support of the District's and OPI's efforts to implement the School Improvement Grant." (Pryor Implementation Agreement, 2010)

### Key Provisions in the Implementation Agreement

- District has the ability to apply for SIG funds on its own, as opposed to OPI providing services to the district and controlling the distribution of funds.
- The transformation model will be used.
- OPI and district agree to participate in a mutual collaborative effort to implement all elements of the transformation model.
- District and union will sign MOU.
- If performance does not improve as expected, OPI could enforce: additional collaboration between OPI and the district, temporarily withholding reimbursement of funds, disallowing costs, or any other enforcement measures permitted by law.
- OPI does not have any authority over the district, the board, its employees, or its students.
- OPI will provide a consultative, non-voting role in all hiring decisions (for all decisions in which OPI wishes to be involved).
- Signatories include the State Superintendent of Public Instruction, district school board chair, district superintendent.

Ensuring that the local board chair, the local superintendent, and the local union head sign either the MOU or the Implementation Agreement ensures that all parties acknowledge the contingencies of the grant. This number of signatures may create a longer negotiation process in some districts, but it also ensures that there is deep and widespread understanding of the components of the improvement process.

OPI leaders stated that the concept of shared responsibility is somewhat innate in rural areas as there are fewer people and entities involved in the process. In such cases, it is difficult to play the typical "blame game" of low-performing schools, as there are fewer people to identify as the source of all the problems. By default, community members and local leaders acknowledge

that they are part of the problem and must also be part of the solution. The Implementation Agreements and the MOU helped formalize this understanding of shared responsibility.

### **Embedded Coaches in the Field**

*“The School Coach mission is to “guide from the side” and facilitate the school improvement cycle.”*

#### **Guided Process**

Due to the lack of local capacity, the use of coaches is a central feature of Montana’s improvement process. Each district with a School of Promise is provided four full-time on-site OPI field staff (called coaches, leaders, and liaisons) that guide the local teams through the transformation model requirements, the improvement process, implementation of the Indicators of Success, and the creation of a sustainable improved school system. The coaches are based in the local communities, are in regular contact with OPI staff, and use a variety of policy and procedure manuals to guide their work and to maintain their objective position during decision making. The coach position is designed to facilitate the changes at the local level by empowering community members to lead the changes.

#### **Coach Recruitment & Professional Development**

Finding sixteen people who met the field staff job requirements and who were willing to potentially relocate for up to three years was challenging. The SIG Management Team called upon a number of retired principals, administrators, school board members, and consultants to fill some of the positions. Other coaches, who were employed by districts at the time, took a leave of absence from their current positions to temporarily serve as a coach in one of the Schools of Promise.

The on-site field staff positions require: knowledge of effective schools research in teaching and learning and successful instructional designs, classroom implementation and school administration, and the ability to deliver appropriate K–12 education to diverse student populations. Sensitivity to the needs of and the ability to provide culturally appropriate instruction for American Indian students was also desired. OPI leaders recruited and placed on-site field staff not only based on their skills, but also on their ability to fit within the local communities. The coaches must become fully entrenched in the communities, and finding the right personality fit is crucial to the success of the improvement efforts.

Each coach works under a one-year contract with OPI that is renewable for two additional years. The SIG Unit Director and Field Consultant work closely with the on-site field staff to monitor the changes in the schools and districts, but also to ensure that the coaches meet the needs of the local community. Due to the requirement to have the improvement process begin in fall 2010, the coaches only received 1.5 days of training on the SIG program and Montana’s plan for improvement. Despite having strong staff who took on their roles quickly, a great deal of professional development for the coaches took place during the entire 2010–11 school year.

The on-site field staff complete weekly reports of their respective schools. These reports include reflections on what was done the previous week, as well as goals for the upcoming week. This clarity requires the coaches to define their work plans each week and to ensure their alignment as a team. Each on-site coach completes a report. Response items vary slightly, but generally include:

- Past week’s activities:
  - Schedule by day
  - Goals
  - Expected hours
  - Changes to last week (i.e., what plans changed during implementation?)
- Summary of action steps/items/SIG requirements (specific to the job focus/role of the coaches)
- Reflection
  - Observations of past week (i.e., School Board Coach reflects on the school board meeting)
  - How my actions built capacity at the local level
  - I need support with...
  - A success from last week...
- Task list
  - Submit time sheets/travel
  - Met with appropriate school, district, or community staff
  - Met with SIG team
- Next week’s planning
  - Upcoming schedule & meetings
  - Goals for position
  - Team goals

The SIG Unit Director receives all four reports from each team every week, responds to any immediate needs, and addresses any upcoming needs and professional development areas with the rest of the SIG team at OPI. The reports are also posted on OPI’s shared file server, which allows other OPI staff the ability to check in

on the progress or to provide more targeted assistance in any of the Schools of Promise.

### ***Division of Responsibilities***

The four coaches in each school/district have separate job descriptions, responsibilities, skill sets, and goals, but each field team “provides school improvement grant services and programs that provide leadership to initiate and develop school improvement efforts in the areas of curriculum, instruction, professional development, and leadership” (Job Profile). Each local School Improvement team includes a Transformation Leader, an Instructional Leader, a School Board Coach, a Community Liaison, and other part-time school and instructional coaches. (See Summary of OPI Field Staff Positions on pages 10-11.)

Improving communication between all of the various players is a crucial piece of Montana’s improvement work. In-person meetings, conference calls, and Interactive TV (iTV) are used to stay in touch with the field staff on a regular basis and to cut down on travel time and costs.

Regular communication between the field staff and OPI’s central office occurs in a variety of ways:

- Each field team meets weekly to discuss progress of the improvement plan, upcoming needs, and how the team needs to work together. A representative from OPI’s central office listens in on these calls as well;
- The four Transformational Leaders, Instructional Leaders, and Community Liaisons each have a conference call with OPI every week. The School Board coaches have two calls per month. These position-specific conference calls are led by the relevant OPI staff lead and offer the coaches the ability to learn from and assist each other across district lines; and
- Weekly reports are submitted from each field team.

Both sets of meetings not only encourage increased communication within the on-site field teams, but they also allow OPI to understand the realities in the field, address issues as they arise, and adapt professional development trainings to reflect the needs of the coaches.

While each coach has his or her own set of responsibilities and goals, all four on-site team members must work together to develop goals, coordinate resources, represent their stakeholders, and model shared decision making and accountability for the community.

## **CONCLUSION**

As members of the SIG Management Team reflect on the first year of increased federal funds, many of them have the same concerns, “How can we sustain the growth once the money is gone? Now that we’re one third of the way done, can we really make the improvements that we know are needed and that we know are possible in these schools?” State education agency staff across the country share these concerns, and Montana’s school improvement plan includes several elements that will assist in sustaining and improving long-term growth.

Montana’s coaching model provides significant support to small communities for three years. It is crucial that the coaches develop the school and district capacity and delegate responsibilities over Years 2 and 3. The on-site staff, the school and the district leadership teams, and the community must create a new status quo based on collaboration and interdependence. Working together to solve a problem, find resources, and bring services to the community must become institutionalized in everyday practices. This coordination will significantly increase capacity at the local level, while also bringing in additional resources to the community.

Addressing sustainability is important as Montana’s leaders plan for the second SIG cohort, and the priorities for receipt of SIG funding will be adjusted to address this concern. Two of the four districts currently part of the SIG program have persistently low-performing feeder schools (elementary and middle schools) and, in order to concentrate resources, those feeder schools will be prioritized during the application process. By focusing the state’s efforts on an entire district, Montana can work to transform an entire system, as opposed to individual schools supported by some district processes. This districtwide improvement will increase the likelihood of continued improvement, sustainability, and the positive impact on the entire community.

Montana leaders acknowledge the isolation and rural nature of the state and have adapted the federal model to address those limitations. Additional services and programs are being developed to meet the ongoing capacity needs in the state—i.e., OPI is working with two professors at Rocky Mountain College in Billings to launch a leadership academy for principals that will focus on leading persistently low-performing schools through a turnaround process. Montana’s Office of Public Instruction figured out how to put a “Montana spin” on the federal School Improvement Grant program by facilitating all SIG efforts from the state level and by highlighting the importance of community involvement and empowerment.

## Summary of the OPI Field Staff Positions

### The Transformation Leader:

- 40 hours per week
- Coordinates, organizes, schedules, implements, and monitors the activities of the local School Improvement Team in coordination with the OPI Unit Director, Division Administrator, and other OPI staff
- Researches, collects, analyzes, manages, and reports scholastic review data, school improvement activities, professional development practices, as well as methods to improve overall school administration
- Supports local education agencies and their efforts to use accountability data to evaluate school performance and identify areas in need of improvement
- Coordinates and administers contracts with educational professionals, institutions, and technical advisors
- Identifies professional development needs of school and district leaders and develops leadership capacity within the district
- Aligns planning and implementation between Title I initiatives and improvement efforts for overall school improvement—e.g., Special Education, Early Reading First, Five-Year Comprehensive Education Plans, Montana Behavioral Initiative, etc.
- Develops project objectives and activities that require interagency coordination/collaboration and partners

The Transformation Leaders works primarily with the district and school administrators to develop a sound infrastructure, policies, and practices. The Transformation Leader works with all of the on-site team members, but works particularly closely with the School Board Coach, as communication among the superintendent, principals, and the school board is crucial to create focus and alignment, and to make progress.

### The Instructional Leader:

- 40 hours per week
- Conducts needs assessment of school districts, teachers, administrators, and curriculum
- Develops, directs, manages, and/or supervises all aspects of improving instructional strategies for specific programs across a broad range of professional areas, including reading/language arts and math
- Facilitates program design, program evaluation, and program implementation
- Establishes criteria, process, and procedures to develop classroom assessments (formative assessments) in the specific curriculum/content area in consultation with curriculum/content specialists
- Identifies professional development needs, develops training modules, and codifies and promotes model lessons and instructional practices
- Identifies personnel issues including staffing patterns, training requirements, and evaluation criteria

Common math and reading programs were selected by OPI for the Schools of Promise and significant training on those programs was necessary in 2010–11. Instruction is a priority for Years 2 and 3, and the Instructional Leader will focus on differentiated instruction, alignment of curriculum, and using data to inform instruction.

### The School Board Coach:

- 15–20 hours per week
- Should have former experience as a school board member
- Conducts an initial assessment of board needs through one-on-one interviews with each board member and appropriate school and district staff
- Identifies structures that will help increase board engagement in increasing student achievement through:
  - Creating a trusting environment
  - Establishing a shared vision
  - Creating a collaborative culture
  - Establishing high expectations
  - Embedding continuous improvement and support
- Attend monthly board meetings and assist with development and implementation of board agendas
- Develops capacity of board members through targeted professional development and training sessions

## Summary of the OPI Field Staff Positions (cont.)

Increasing capacity of school boards is one of the most challenging, but important, pieces of the Montana improvement efforts. School board members are elected in Montana and often lack an understanding of administrative and financial issues. The School Board Coach works closely with the Transformational Leader to increase the lines of communication between the superintendent and the board, and teaches board members how to make good decisions based on data.

In the first year, the on-site team focused on embedding increased monitoring and accountability across the district—i.e., the principals monitor teachers, the superintendent monitors principals, the school board monitors the superintendent, and the community informs and monitors the school board. As communication increases, the coaches work with the board members to teach them how to ask the right questions, what information they need, and how to get that information. All Schools of Promise board members were encouraged to participate in a statewide board-training program, but few attended. In Year 2, the School Board Coaches will attend the training program run by the Montana Association of School Boards, they will bring back the tools and resources to OPI, the entire team will synthesize the most important pieces, and then the Coach will run the trainings on-site. While retention is always a concern with school boards, OPI hopes that the skills and new norms become institutionalized enough that they will continue, despite any changes in board membership.

### **The Community Liaison:**

- 30 hours per week
- Provides technical assistance and support to schools, school boards, administrators, staff, and stakeholders for youth engagement and well-being, school climate, and community involvement
- Assists in the development and analysis of school climate and student/community perception assessment activities and data collection
- Supports advocacy efforts to encourage school districts to adopt and implement comprehensive youth-school-community policies
- Builds awareness, educates, and motivates education and community leaders and the general public about youth-school-community engagement activities
- Collaborates with specialists, outside partners, and civic groups to determine community needs and the availability of services, and develop goals for meeting needs
- Establishes and maintains cooperative working relationships with teachers, school administrators, students, youth councils, school boards, educational associations, state and federal agencies, and the general public

OPI's Youth and Community Coordinator works closely with the Community Liaisons to coordinate efforts and to ensure that programs meet the needs of the high-poverty American Indian community. The Community Liaison also represents the student voice in all meetings and decisions.

## **Disclosures:**

The Center on Innovation & Improvement/Academic Development Institute implemented the Academy for Pacesetter States and developed the Solid Foundation® program. Montana has been a member of the Academy since 2009.

## **REFERENCES & ADDITIONAL RESOURCES**

### **Center on Innovation & Improvement**

- Academy of Pacesetter States  
<http://www.centerii.org/academy/>
- Transformation Toolkit  
[http://centerii.org/resources/Transformation\\_Toolkit-0409.pdf](http://centerii.org/resources/Transformation_Toolkit-0409.pdf)

### **Montana Office of Public Instruction**

- Individual School of Promise Websites
  - Frazer School  
<http://www.opi.mt.gov/Programs/Promise/Frazer.html>
  - Lame Deer School  
[http://www.opi.mt.gov/Programs/Promise/Lame\\_Deer.html](http://www.opi.mt.gov/Programs/Promise/Lame_Deer.html)
  - Lodge Grass School  
[http://www.opi.mt.gov/Programs/Promise/Lodge\\_Grass.html](http://www.opi.mt.gov/Programs/Promise/Lodge_Grass.html)
  - Pryor School  
<http://www.opi.mt.gov/Programs/Promise/Pryor.html>

- Job Profile and Evaluation
  - Community Liaison
  - Instructional Leader
  - School Board Coach
  - Transformation Leader
- Memorandum of Understanding, Pryor Public Schools & Pryor Education Association, May 11, 2010
- Office of Public Instruction website <http://opi.mt.gov>
- Official state website <http://mt.gov>
- Schools of Promise Main Page [http://www.opi.mt.gov/Programs/Promise/index.html#gpm1\\_1](http://www.opi.mt.gov/Programs/Promise/index.html#gpm1_1)
- Schools of Promise Community Flyer <http://www.opi.mt.gov/pdf/sop/SOPCommunity-Flyer.pdf>
- Schools of Promise Overview <http://www.opi.mt.gov/pdf/sop/10SpringSOPOverview.pdf>
- Schools of Promise Work Plan <http://www.opi.mt.gov/pdf/sop/10SpringSOPWorkplan.pdf>
- SIG Implementation Agreement, Montana Office of Public Instruction, Pryor Public Schools, May 21, 2010
- SIG Weekly Summary and Report
  - Community Liaison
  - Instructional Leader
  - School Board Coach
  - Transformation Leader
- Title I, School Improvement Main Page [http://opi.mt.gov/Programs/TitlePrgms/TitleIA/Index.html?gpm=1\\_9#gpm1\\_11](http://opi.mt.gov/Programs/TitlePrgms/TitleIA/Index.html?gpm=1_9#gpm1_11)

Northwest Regional Comprehensive Center. (2011). *Montana Schools of Promise: A School Improvement Grant Model (Draft)*.

## Center on Innovation & Improvement

121 N. Kickapoo Street  
Lincoln, IL 62656

[www.centerii.org](http://www.centerii.org)    [www.families-schools.org](http://www.families-schools.org)

**Information    Tools    Training**

Positive results for students will come from changes in the knowledge, skill, and behavior of their teachers and parents. State policies and programs must provide the opportunity, support, incentive, and expectation for adults close to the lives of children to make wise decisions.

The Center on Innovation & Improvement helps regional comprehensive centers in their work with states to provide districts, schools, and families with the opportunity, information, and skills to make wise decisions on behalf of students.

The Center on Innovation & Improvement is administered by the Academic Development Institute (Lincoln, IL) in partnership with the Temple University Institute for Schools and Society (Philadelphia, PA), Center for School Improvement & Policy Studies at Boise State University (Boise, ID), and Little Planet Learning (Nashville, TN).

*A national content center supported by the  
U. S. Department of Education's Office of Elementary and Secondary Education.  
Award #S283B050057*

*The opinions expressed herein do not necessarily reflect the position of the supporting agencies,  
and no official endorsement should be inferred.*

© 2011 Academic Development Institute. All rights reserved.

Editing: Robert Sullivan

Design: Pam Sheley