



PATHWAYS
TO COLLEGE
NETWORK

Pathways to College Network Summary Report of P-16 Policy Roundtable in Montana

Purpose and Goals

On October 2, 2002, the Montana Governor's Office, Montana Board of Public Education and the Montana Board of Regents co-sponsored a Pathways to College P-16 Policy Roundtable to develop recommendations related to preparation, access, success and finance issues for low-income students within a P-16 framework. The major goals of the meeting were to introduce the concept of P-16 education and launch a multi-level statewide dialogue on access, success and financial aid for low-income students. Participants included 52 K-12, postsecondary, legislative and executive leaders.

Discussion and Outcomes

Background materials provided to the participants included a Pathways briefing memo on P-16 education, P-16 publications from ECS, Census data on the connection between education and income, a paper on privatization in higher education by University of Montana President George Dennison and background materials on the current situation in Montana prepared by the Office of Public Instruction and the Board of Regents. (See Attachment #3 for list of reports and articles).

The major elements forming the backdrop for the Roundtable discussions in Montana include: (1) shrinking K-12 enrollments, (2) NAEP scores above national averages, (3) high graduation rates from high school, (4) low college going rates, (5) declining levels of state support for higher education, (6) fairly high college costs compared to income levels, (7) a preponderance of students enrolled in four-year colleges (71%), (8) little state investment in student financial aid, (9) low college completion rates, (10) a difficult state budget crisis and (11) a culture in which a significant portion of the population does not value a college education.

Following welcoming words from Superintendent of Public Instruction Linda McCulloch, Board of Public Instruction Chair Kirk Miller and Board of the Regents Chair Richard Roehm, Roundtable presenters briefed the attendees on how the Pathways to College Network can help Montana (Cheryl Blanco, WICHE), "Thinking P-16" (Spud Van de Water, ECS), "What Counts Most in the 'New' Human Capital Economy?" (Tom Mortenson, Pell Center for the Study of Opportunity in Education) and "Postsecondary Education in a P-16 System" (Terese Rainwater, ECS). Presenters paused to allow Montana Governor Judy Martz to welcome the participants and stress the importance of these issues to the future of Montana.

The single most compelling point made in the morning presentations was Tom Mortenson's graph of Montana appropriations of state tax funds for higher education per \$1,000 of personal income over the last 40 years.

Strong growth in the 1960s was followed by ups and downs during the 1970s and 1980s and steady decline in the 1990s. The bottom line: Fiscal 2003 shows the lowest tax effort in support of higher education in Montana in more than 40 years.

Following lunch, Montana State University professor Mike Jetty focused attention on best practices for low-income students in Montana. Participants then chose to attend either a panel on financing a college education or one on preparing low-income students for postsecondary education. Panelists were Montana leaders from K-12 and postsecondary education who shared their experience and ideas for improving financial and academic access for Montana's low-income students.

Following the panels, participants were assigned to one of four working sessions on privatization, financial aid, support services, improving retention and graduation rates. Participants were asked to share ideas about how to address the educational disadvantages of Montana's low-income students and how to prepare and retain them in the educational system. Reporters shared the flavor of these discussions with the whole group in response to the following questions posed by the Higher Education Commissioner Richard Crofts:

1. What barriers do low-income Montanans face on their education journey? Responses included:
 - (a) Lack of state support for education
 - (b) Low expectations of parents and teachers
 - (c) Poor basic skills preparation
 - (d) High costs of child care and housing compared to income
 - (e) Lack of understanding of the financial aid process
 - (f) Few or unclear incentives to move out of support programs
 - (g) Inconsistent messages about the importance of education.

2. What should Montana do to mitigate these barriers?
 - (a) Focus and improve professional development to concentrate on the skills and knowledge expected of entering students by the state's colleges and universities
 - (b) Encourage/emphasize postsecondary outreach to K-12 and tribal leaders
 - (c) Encourage greater community involvement
 - (d) Redefine the nature of higher education to provide increased access
 - (e) Simplify processes that support low-income students, e.g., financial aid.

3. What policies/statutes get in the way of abolishing barriers?
 - (a) Conflict/disconnect between high school exit and college entrance standards (Commissioner Crofts noted that this work is already underway)
 - (b) Financial aid policies for non-traditional students, e.g., the number of credit hours required for full-time status to be aid eligible
 - (c) Need more funds to support improved counseling.

Lessons Learned for Pathways

In their concluding comments, Commissioner Crofts and Superintendent McCulloch agreed that two themes came through clearly during the day's discussions: (1) education leaders need to collaborate more closely to improve student transitions at key points and (2) communications is key to exposing the myth that higher education is not necessary and that there is financial assistance available for low-income students. They pledged to lead efforts to develop a K-16 dialogue that centers on the needs of low-income students (Montana is not ready for a pre-school emphasis) and to do everything they can, given limited funding, to address these themes.

(1) Timing is Important

Montana responded positively to the idea of hosting a Roundtable when first asked in a SHEEO survey in early 2001. In summer 2001 when Pathways invited Montana to co-sponsor a Roundtable, interest remained strong. Planning began in winter 2002 with a Roundtable scheduled for October. In spring 2002, the budget crunch hit and addressing future needs was forced to take a back seat to maintaining current services. By October 2002, Montana's fiscal crisis had become a major deterrent to new initiatives and leaders gathered for the Roundtable felt battered by budget woes. While they clearly understood the need to face issues like low enrollment rates and high dropout rates, this was not a good time. The best they hoped for was laying the groundwork for future initiatives while trying to find low cost improvements to current programs in a time of fiscal distress. Although bold, innovative action seemed beyond reach at the moment, they also recognized that much could be done to ready the state to address these issues when budgets improved.

(2) State Co-sponsor

As with other Roundtables, it was clear that having a committed in-state co-sponsor is essential for the following reasons: (a.) knowledge of local context and issues, (b.) ability to identify appropriate invitees, (c.) ability to persuade invitees to attend, (d.) assistance in designing the Roundtable day, (e.) willingness to provide on-site logistical support and (f.) willingness to play a leadership role in follow-up activities. Joyce Scott, Montana's deputy commissioner for Higher Education, exhibited all of these traits and did an excellent job as Pathways key collaborator in preparing for this Roundtable.

(3) Limited Issues

Preparation for a Roundtable meeting typically begins with a discussion of the content focus and appropriate audience for the Roundtable. Pathways' experience so far has been that state leaders' tend to view Roundtables as an opportunity to make progress on multiple issues. Pathways policy partners' experience, on the other hand, has been that limiting a Roundtable to one or two issues increases the chances of commitment to action and aggressive follow-up. Our in-state co-hosts, including Montana, have graciously accepted the Pathways' approach and picked one or two leading issues as the focus for the Roundtable. In our judgment, this has allowed participants to devote significant time to core issues, develop leadership networks and commit to follow-up action. We intend to continue this strategy in the future.

For Further Information

October, 2002

(4) Action Orientation

While Pathways remains committed to pushing state leaders to act on research and best practice findings, we realize that circumstances may dictate a slower pace. This is the case in Montana in fall 2002. Near term action will be limited by a difficult budget situation and a culture that does not assign a high priority to postsecondary education. In-state education leaders work in a difficult climate but plan to address major issues within the limited funding available. They may have to wait for better fiscal conditions to address the most costly items that constitute barriers for current low-income Montana students. Until then, low-income preparation and access enhancements seem destined to receive, as one Native American participant noted, "Much thunder . . . little rain."

The Pathways to College Network is an alliance of major foundations, nonprofit organizations, educational institutions, and the U.S. Department of Education, working together to improve college access and success for underserved youth, including low-income, minority, and first-generation students. Within Pathways, the policy component strives to achieve Pathways goals through activities that better inform policy makers and policy shapers on the issues around student achievement and college access and success. The primary partners in this work are The College Board, Education Commission of the States (ECS), State Higher Education Executive Officers (SHEEO), and the Western Interstate Commission for Higher Education (WICHE).

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FUNDERS

Occidental College
Daniels Fund
Ford Foundation
Bill & Melinda Gates Foundation
GE Fund
The James Irvine Foundation
W.K. Kellogg Foundation
KnowledgeWorks Foundation
Lucent Technologies Foundation
Lumina Foundation for Education
U.S. Department of Education

Fund for the Improvement of Postsecondary Education
Office of Vocational and Adult Education

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University of California System - EMP Collaborative
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