



Education and Workforce Data Governing Board

Report to the Education Interim
Committee and the Education Interim
Budget Committee

Department of Administration

September 1, 2026

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Purpose

In accordance with 5-11-210, this report provides the Education Interim Committee and the Education Interim Budget Committee an update on the activities and progress of the Education & Workforce Data Governing Board.

About

Montana's 68th Legislature (2023) enacted HB 949 establishing the Education and Workforce Data Governing Board, a transparent multi-agency governance board tailored to apply oversight, structure, and a shared commitment to the "linkage of education and workforce data gathered and maintained by state agencies to ensure that the data is used to benefit the people of the state in a secure manner and only for appropriate uses."

The Education and Workforce Governing Board is attached to the Department of Administration for administrative purposes, as provided by 2-15-121. Board membership consists of five voting members: the Director of the Department of Administration, the Superintendent of the Office of Public Instruction, the Commissioner of Higher Education, the Commissioner of Labor and Industry, and the Presiding Officer of the Board of Public Education, along with four non-voting members: the State Chief Information Officer, the Legislative Fiscal Analyst, the Legislative Auditor, and the Director of Legislative Services.

The contributing agencies "subject to the policies developed by the board" are the Office of Public Instruction (OPI), the Office of the Commissioner of Higher Education (OCHE), and the Department of Labor and Industry (DLI) as these state agencies "gather and maintain education and workforce data."

Defined requirements for the Board, include, but are not limited to:

- Develop and make available a model data-sharing agreement that allows for reciprocal sharing of information between public schools, public, private, or tribal institutions of higher education, and state and local workforce entities;
- Work with the contributing agencies to create, publish, and make publicly available a data inventory and dictionary of data elements with definitions to ensure the integrity and quality of the data collected and reported;
- Develop an education and workforce research agenda and data plan to:
 - i. improve alignment across existing programs and systems;
 - ii. support student success in K-12 education, higher education, and the workforce;
 - iii. increase the efficiency and effectiveness of state education, training, workforce, and financial aid programs; and
 - iv. equip local and state policymakers with information about education and workforce development;
- Develop and implement policies and procedures for the linking and sharing of education and workforce data among the contributing agencies.

Summary

The Legislature found that “a systems approach with shared governance between relevant agencies is the best way to utilize education and workforce data while ensuring that the data is only used for appropriate purposes and in compliance with the Family Education Rights and Privacy Act of 1974, 20 U.S.C. 1232g, as amended, and its implementing regulations at 34 CFR, part 99, and all other relevant federal and state privacy laws.”

Since actualization, the Board has made significant progress in meeting directives:

- Governance policy: Implemented 2024; updated 2025, 2026.
- Research agenda: Implemented 2024; updated 2025, 2026.
 - Contributing agencies individually sponsor questions and work collaboratively to share, link, and utilize longitudinal and point-in-time data.
- Templated memorandum of understanding allowing for “reciprocal sharing of information between public schools, public, private, or tribal institutions of higher education, and state and local workforce entities.” Implemented 2024.
- Publicly available data dictionary on the Education & Workforce Data Governing Board webpage, <https://doa.mt.gov/EWDGB/>.

Continually striving to improve understanding of the effective purposes and uses for education and workforce data sharing, the Board has exceeded the bill’s requirements and implemented additional reports providing transparency.

- Education & Workforce Data Governing Board Data Request Register (page 3): A register of all data requests between the contributing agencies and “public schools, public, private, or tribal institutions of higher education, and state and local workforce entities.” Board requests for disclosure of public school/s and tribal institution/s data requests have been declined or no response by some agencies. Currently, one (1) contributing agency data request from December 2025 is pending. Publicly available at: <https://doa.mt.gov/EWDGB/>.
- Education & Workforce Data Governing Board Annual Report on Public and Private Data Requests: Annual reporting by the contributing agencies on all data requests received (public and private, excluding Board contributing agencies), initiated in September 2025, first reports provided July 2026, and continuing annually upon July of each year. Annual reports are currently available to all Board members.

The *Education and Workforce Data Governing Board Research Agenda* is addressed at each Board meeting utilizing the adopted Research Project Timeline Form. Contributing agencies provide complete updates on progress and achievement in meeting their sponsored agenda questions. The Research Project Timeline Forms are available to all Board members with the July 16, 2026, agency submissions beginning on page 8.

Future progress rests entirely on the contributing agencies’ willingness to securely and safely share data.

Education and Workforce Data Governing Board Data Request Register

Data Requests Between Contributing Agencies, Public Schools, Public, Private, or Tribal Institutions of Higher Education, and State and Local Workforce Entities: 2024 – Present

Date of Request	Requesting Agency	Owning Agency	Description of Data Requested	Purpose of Data Transfer	Use of Data Transfer	Status of Data Request (Pending, Executed, Denied)	End Date
3/21/2025	DU	OCHE	Degree / Completions Data, Enrollment Data	Longitudinal data studies on the efficacy of various workforce and education initiatives. Federal WIOA Title I and III reporting.	Research and results of the data share will enable evaluation and improvement of higher education programs and instruction, including workforce programs and training efforts. Data produced will also be utilized to support and inform prospective and current students with regard to employment outcomes tied to post-secondary education programs.	Executed 10/22/2025	7/31/2028
4/17/2025	OCHE	DLI	Unemployment Wage Data	Longitudinal data studies on the efficacy of various workforce and education initiatives.	Research and results of the data share will enable evaluation and improvement of higher education programs and instruction, including workforce programs and training efforts. Data produced will also be utilized to support and inform prospective and current students with regard to employment outcomes tied to post-secondary education programs.	Executed 10/22/2025	7/31/2028
10/6/2025	OPI	OCHE	Enrollment Data	Data requested on behalf of OPI by Paul N. Thompson of Oregon State University.	OPI will match OCHE post-secondary records to OPI K-12 data. With a data sharing agreement established, and individual student identifiers removed and/or obfuscated, Paul N. Thompson will receive the matched data for the purpose of researching the longitudinal impacts of K-12 four (4) day and five (5) day school week. Results of the data analysis will provide OPI with improved school week model information.	Executed 10/23/2025	5/13/2027
12/3/2025	OCHE	OPI	Student Demographic & Enrollment Data	To create an identities table containing direct identifiers of students represented in datasets held by both parties.	Creating and maintaining this identities table allows for repeatable and consistent matches between Transferor's and Recipient's student data. This will be useful in any future work done by either agency that requires the use of student data from both agencies by ensuring that future matching activities require significantly less time and resources to complete.	Executed 8/10/2026	8/10/2028
12/3/2025	OCHE	OPI	Student Demographic & Enrollment Data	Determine which students are taking courses and matriculating to the Montana University System and other higher education institutions.	This data matching will help OCHE determine where and when students are matriculating and taking courses from higher education institutions, directly related to EWDCB Research Question #4. This data share would also be a first step in being able to answer research questions #1 (establishing a direct college admissions program to the MUS for Montana residents) and #8 (support student success in federal funded programs that span K-12 through higher education).	Pending	
1/7/2026	DU	OPI	School Employee Compensation and Licensing Data	Research and analysis on teacher compensation in Montana	Publication of an updated Teacher Compensation Report prior to the 2027 legislative session, providing summary data on the compensation of teachers and administrators across school districts, geographic areas, and other teacher characteristics as well as labor market characteristics of teachers and administrators in Montana such as turnover and wage growth.	Executed 4/02/2026	6/30/2027
N/A	DU	Fort Peck Community College	Degree/ Completion Data	Studies on the efficacy of FPCC educational programs on employment outcomes in Montana.	This data exchange will enable research by DLI on the employment of students/graduates from FPCC in Montana's workforce. It will further allow FPCC to analyze and improve the quality of higher education programs at their institution and understand their contribution to workforce development in Montana.	Executed 12/01/2025	12/31/2028
N/A	DU	Salish Kootenai College	Degree/ Completion Data	Studies on the efficacy of SKC educational programs on employment outcomes in Montana.	This data exchange will enable research by DLI on the employment of students/graduates from SKC in Montana's workforce. It will further allow SKC to analyze and improve the quality of higher education programs at their institution and understand their contribution to workforce development in Montana.	Executed 09/13/2024	7/31/2026
N/A	DLI	University of Providence	Degree/ Completion Data	Studies on the efficacy of UP educational programs on employment outcomes in Montana.	This data exchange will enable research by DLI on the employment of students/graduates from UP in Montana's workforce. It will further allow UP to analyze and improve the quality of higher education programs at their institution and understand their contribution to workforce development in Montana.	Executed 12/22/2025	12/31/2027

Education and Workforce Data Governing Board Research Agenda

Revised & Approved: 7-16-2026

Establishing the Education and Workforce Data Governing Board (HB 949; 2023), the Legislature found that “the utilization of education and workforce data holds great promise for developing the full educational potential of Montanans and in maximizing the effectiveness of state investments in education and workforce systems.” (20-7-136(1)(a), MCA)

The Legislature tasked the Board with the development of education and workforce research agenda to:

- improve alignment across existing programs and systems;
- support student success in K-12 education, higher education, and the workforce;
- increase the efficiency and effectiveness of state education, training, workforce, and financial aid programs; and
- equip local and state policymakers with information about education and workforce development. (20-7-138(7)(b), MCA)

The Education & Workforce Data Governing Board publishes a research agenda describing research areas and priority questions. The Education and Workforce Data Governing Board Contributing Agencies, the Office of Public Instruction (OPI), the Office of the Commission of Higher Education (OCHE), and the Department of Labor and Industry (DLI) individually sponsor the agenda questions and work collaboratively to address the agenda, sharing, linking, and utilizing longitudinal and point-in-time data. The Research Agenda reflects a shared commitment among Contributing Agencies to engage in partnerships in order to improve the interconnection between education pathways and employment opportunities in Montana. The agenda is focused on the following research areas:

Pathways and Pipelines: Study of the entry, transition, and exit points students and individuals take through specific education levels, services and programs, and labor sectors. Questions for this agenda item include, but are not limited to:

1. How might Montana establish a direct college admissions program to inform soon-to-be high school graduates before they apply that they are already accepted to in-state institutions based on their academic profile?
 - ✓ *Value to Montana:* Providing preemptive information to students takes the risk out of the college application process (getting in is now a ‘sure thing’) and helps students who may not feel they are college material know that they are. Using existing data and commitments to share this information is much more cost-effective than college marketing campaigns.
 - ✓ *Sponsor:* Office of the Commissioner of Higher Education
2. Through what pathways do nontraditional students return to educational and training opportunities in Montana? What are common characteristics of individuals who return to complete K-12 equivalencies and individuals that return to postsecondary offerings? How do their workforce outcomes change?

- ✓ *Value to Montana:* The evolving needs of the workforce requires individuals to add skills, retrain, and continuously evolve to new in-demand skills. Identifying characteristics of individuals who return to education from the workforce and how their workforce outcomes differ can help institutions facilitate and support those individuals to complete their training programs and improve workforce outcomes.
 - ✓ *Sponsor:* Office of the Commissioner of Higher Education
3. Does Montana provide K-12 completers, specifically students and individuals with special needs, validated programmatic opportunities for success in the post-secondary and workforce environment?
- ✓ *Value to Montana:* About 14% (over 21,000) of Montana PK-12 students are receiving special education services under IDEA. Federal and state laws require additional services and transition plans to prepare special education students for success after high school. However, there are major disparities across the state in terms of transition services provided and the success rate of these young adults in careers or college after they graduate. In addition to federal and state obligations to ensure every student is prepared for success, Montana's economic demands require our state to intentionally engage all potential workforce development sectors.
 - ✓ *Sponsor:* Office of Public Instruction

Educational, Training, and/or Workforce Outcomes: Study of student-level and/or institutional-level characteristics and the importance of these characteristics in predicting outcomes. Questions for this agenda item include, but are not limited to:

4. Which students from K-12 matriculate to colleges or universities, whether in Montana or out of state, and which students do not? Of the students not matriculating, are they leaving the state for education and/or workforce opportunities or are they staying in Montana? Of particular interest are outcomes of students with special needs, students classified as low socioeconomic status, and students of American Indian classification.
- ✓ *Value to Montana:* The MUS, Reach Higher Montana, and private philanthropy makes substantial annual investments to improve college access and opportunities. Improved analytics would help us target and evaluate interventions.
 - ✓ *Sponsor:* Office of the Commissioner of Higher Education
5. What is the relationship between K-12 CTE concentrators and entrance and immediate success in a Montana Department of Labor & Industry apprenticeship program, work-based certificate program, or industry-recognized credential program, or entrance and immediate success in a Montana University System college-level certificate program?
- ✓ *Value to Montana:* The state has long sought to coordinate K-12/MUS/and DLI data and initiatives to reduce silos and better prepare young people for success in their careers and post-secondary studies after high school, in a way that aligns with the state's economic demands. Studying CTE concentrator data to ensure alignment with

market demands and post-secondary or college training pathways will better inform state CTE policies, program investments, and initiatives.

✓ *Sponsor:* Office of Public Instruction

6. What workforce outcomes result following the attainment of a postsecondary degree or credential? How do the returns of postsecondary attainment vary by program of study or other characteristics of the student?

✓ *Value to Montana:* Montana post-secondary institutions are one important component of workforce training, and therefore it is essential to understand if post-secondary students are graduating in fields that align with workforce demand. Understanding the returns to postsecondary attainment in the Montana workforce will help educators, students, and policymakers make data-driven decisions about investments in postsecondary education.

✓ *Sponsor:* Department of Labor & Industry

7. How might Montana identify short-term education and training programs that qualify for Workforce Pell under federal rules, and what data and methodological approaches can the state use to address small sample sizes when assessing program outcomes such as completion, employment, and value-added earnings?

✓ *Value to Montana:* Workforce Pell creates new opportunities for Montanans to access short-term, in-demand training, but many Montana programs will have small cohorts that complicate outcome measurement. Identifying which short-term programs qualify for Workforce Pell and developing sound methods to evaluate outcomes with limited sample sizes will help the state implement these new rules.

✓ *Sponsor:* Department of Labor & Industry

Program and Policy Evaluation: Program and policy evaluation is intended to determine whether a given program or policy has been successful. The evaluation may be used to improve program effectiveness, efficiency (distribution of costs and benefits), and/or equity and to inform policy or program changes (including reforming or discontinuing programs), program renewals and/or program expansions. Questions for this agenda item include, but are not limited to:

8. How might Montana establish improved data connections across K-12 and higher education to support student success in federally funded programs that span K-12 through higher education?

✓ *Value to Montana:* Montana embraces the positive goals that federally funded programs such as Perkins, Gear Up, and Talent Search aim to bring to student outcomes. Advancing connections across K-12 and higher education will identify where improvements in student supports are needed in areas such as matriculation, completions, transitions between education levels, and program parameters.

✓ *Sponsor:* Office of the Commissioner of Higher Education

9. What is the relationship between K-12 math completion and academic entry and success in the Montana University System?

- ✓ *Value to Montana:* The State Board of Education, through joint initiative of the Board of Public Education and Board of Regents, passed a resolution in November 2024 calling for additional secondary/post-secondary coordination and alignment in addressing math proficiency in high school. Lack of proficiency in math has long been recognized as a problem for the state. The 69th Legislature passed HB 338 adding numeracy to the state's targeted early intervention programs. As a pressing PK-20 issue acknowledged by multiple state agencies, the connection between secondary and post-secondary math achievement should be examined in parallel with early intervention strategies. Strengthening this bridge could reduce the need for academic support upon entry into the Montana University System (MUS) and promote on-time graduation.
- ✓ *Sponsor:* Office of Public Instruction

10. How has teacher compensation in Montana changed in response to the incentives created under the STAARS Act?

- ✓ *Value to Montana:* Significant investments in public schools were made under HB 252, including incentives to raise entry-level teacher pay and to expand career and technical education opportunities for middle and high school students through Future Ready payments tied to opportunities validated through a new credential registry. Researching whether the legislation is effective in achieving its stated objectives will help inform future policies and investments in Montana's public education system.
- ✓ *Sponsor:* Department of Labor & Industry

Contributing Agency Research Project Timeline and Tracking Forms

Department of Labor & Industry

Research Project Timeline and Tracking Form

Adopted: 6-30-25
Update: July 16, 2026

Agency: Department of Labor and Industry

Research Project / Agenda Question #: 6. What workforce outcomes result following the attainment of a postsecondary degree or credential? How do the returns of postsecondary attainment vary by program of study or other characteristics of the student?

Principal Researcher: Olivia Hayes

Principal Researcher Contact: awatson@mt.gov

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Project planning	Outreach to tribal colleges and private colleges for inclusion in analysis	6/2025 / 6/2026	Agreements on data share established and data is obtained.	Amy Watson in coordination with DLI Tribal Liaison	Agreements with University of Providence and Fort Peck Community College have been fully executed. Received UP and RMC data. Awaiting FPCC and Carroll College data. DLI provided Blackfeet CC with draft MOU and official data request but didn't receive a response. Deadline for participation was extended to 6/26/2026 but is now closed.
Project planning	Update data sharing agreement between OCHE-DLI	7/2025 / 10/2025	Signed MOU	Amy Watson	Fully executed MOU signed October 2025.

Data share and matching	Share and match data across agencies	10/2025/ 1/2026	Executed data share with successful match.	Amy Watson Emily Trautman	Data share was completed on 1/7/2026. DLI can access data in Snowflake.
Data Prep	Merge and prep graduate data from colleges and OCHE	1/2026/ 7/2026	Graduate file ready for wage and income matching.	Amy Watson Olivia Hayes	Finished initial cleaning of individual graduate files. Cleaned apprenticeship RTI records for inclusion in report. Awaiting data from Fort Peck CC and corrected data from Carroll College. Once received, then the file will be ready for income matching. BLS wage match cannot be completed until October due to federal work schedule.
Employment Projections	Generate occupation employment projections used to measure postsecondary workforce demand	5/2026/ 7/2026	2025-2035 employment projections submitted to BLS.	Nick Holom	Completed on 7/10/2026.
Supply and Demand Analysis	Compare graduate supply and demand by program and occupation	7/2026/ ongoing	Generation of supply and demand tables	Olivia Hayes	Data is prepped and analysis will begin as soon as the individual file has been sent to DOR.

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Department of Labor and Industry

Research Project / Agenda Question #: 7 Establishment of a credential registry

Principal Researcher: Crystal Armstrong

Principal Researcher Contact: Crystal.Armstrong@mt.gov

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Contractor Identification and Award	RFP Process	5/2025 / 7/2025	Contract awarded.	Crystal Armstrong	Credential Engine was awarded the contract.
Determine data layout	Specify data requirements for credentials to be added to the registry	7/2025 / 8/2025	Schema / data layout determined	Crystal Armstrong Chris Bradley Credential Engine	CTDL schemas are being used, leveraging with customizations for Montana specific requirements.
Stakeholder outreach	Focus groups and community engagement	8/2025 / 11-30-2025	Initial list posted for public comment period.	Crystal Armstrong	Focus group conversations with key CTE and K12 groups, other outreach and engagement with Montanans at work tour.
	Credential identification and data preparation for	8/2025 / 11/30/2025	First posting of credential registry	Chris Bradley Credential Registry	Future public comment periods and reviews of

Populate Initial Registry and Publish	loading. Schema alignment.		publicly available as of 12/1/2025		proposed IRCs for registry will occur.
Define Work Based Learning Opportunities	Specify requirements for WBL inclusion	1/1/2026-	Work-based learning opportunities rules are published	Crystal Armstrong Chris Bradley	WBL rules will be posted after rulemaking starting.
First registry update	Additional rulemaking for WBL opportunities and incorporating additional IRCs	4/2026-	Rulemaking/public comment completed	Crystal Armstrong Chris Bradley Conner Mostek	New credential registry list to be posted following rulemaking.

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Department of Labor and Industry

Research Project / Agenda Question #: 10 How has MT teacher pay changed in response to the STARS Act

Principal Researcher: Emily Trautman

Principal Researcher Contact: Emily.Trautman@mt.gov

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Research Planning	Assess data availability, timelines	7/1/2025 / 10/1/2025	Complete	Emily Trautman	In March 2026 the 24-25 academic year GEMS data will be available for analysis. The 24-25 academic report will be ready November 2026. As such, this analysis will cover the school year before the STARS act passage
Preliminary Research	Exploratory research on administrator pay using data from 2025 report.	10/2025 / 12/2025	Complete	Emily Trautman Amy Watson	Stakeholder input has been used to determine data request and expected analysis for 2026 report.
MOU Request	Make MOU request, finalize MOU language, execute agreement.	12/2025/ 4/2026	Execution of agreement	Chris Bradley Emily Trautman	MOU fully signed 4/2/2026.

Data Prep	Transfer of data, prep for analysis	4/2026/ ongoing	Data prepped for analysis / merged with DLI UI data.	Emily Trautman	Initial data received from OPI 4/6 and merged with UI data. DLI identified data issues, requested corrected OPI data pull on 05/26/2026. DLI is currently awaiting updated data from OPI to complete data prep.
Compensation Analysis for Teachers and Administrators	Calculate salary and non-salary income by district, education, and experience.	<i>Delayed</i>	Draft of Teacher and Administrator Compensation sections	Emily Trautman	Analysis start is pending corrected file of teacher and administrator expenditure and licensure data.

Office of the Commissioner of Higher Education

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Office of the Commissioner of Higher Education

Research Project / Agenda Question #: 1. How might Montana establish a direct college admissions program to inform soon to be high school graduates before they apply that they are already accepted to in-state institutions based on their academic profile. Through what pathways do nontraditional students return to educational and training opportunities in Montana?

Principal Researcher: Eric Meredith

Principal Researcher Contact: emeredith@montana.edu, (406)449-9165

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Program Parameters: Authorization	Research appropriate authorization to create a direct communication of data between OPI and OCHE	7/30/2025 / Ongoing	Review of Board of Regents, Legislative, Board of Public Ed applicable statutes and completion of MOU between agencies	a) Eric Meredith b) Tyler Trevor	Work on a MOU is in process now.
Research Parameters: Data Access	Work with IT divisions at the state, school and agency level to create a means of data communication between agencies	7/30/2025 / Ongoing	Access to data is available to each agency	a) Eric Meredith a) John Thunstrom	A working tunnel is currently available between agencies to allow data sharing.

Research Parameters: Matching students	Without a common ID used by both agencies an agreed upon method of matching students is needed.	7/30/2025 / Ongoing	Agreed upon method of matching students is completed and used by both agencies. May include a shared table of ID's between agencies.	a) Eric Meredith b) John Thunstrom	An MOU to create this matching process has been created and is making its way through the approval process.
Program Parameters: Resident Student Access	Develop a method that allows data from each student's academic profile to be used to determine their acceptance into MUS schools	7/30/2025 / Ongoing	Viable method that allows all MT High School soon to be graduates to be accepted based on their academic profile	a) Scott Lemmon Eric Meredith b) John Thunstrom Tyler Trevor	

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Office of the Commissioner of Higher Education

Research Project / Agenda Question #: 2, Through what pathways do nontraditional students return to educational and training opportunities in Montana? What are common characteristics of individuals who return to complete K-12 equivalencies and individuals that return to postsecondary offerings? How do their workforce outcomes change?

Principal Researcher: Eric Meredith

Principal Researcher Contact: emeredith@montana.edu, (406)449-9165

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Program Parameters: Authorization	Research appropriate authorization to create a direct communication of data between OPI and OCHE	7/30/2025 / Ongoing	Review of Board of Regents, Legislative, Board of Public Ed applicable statutes and completion of MOU between agencies	a) Eric Meredith a) Tyler Trevor	Work on a MOU is in process now.
Research Parameters: Data Access	Work with IT divisions at the state, school and agency level to create a means of data communication between agencies	7/30/2025 / Ongoing	Access to data is available to each agency	a) Eric Meredith b) John Thunstrom	A working tunnel is currently available between OPI-OCHE to allow data sharing. OCHE-DLI data is being shared using Snowflake.
Research Parameters: Matching students	Without a common ID used by both agencies an agreed upon method of matching students is needed.	7/30/2025 / Ongoing	Agreed upon method of matching students is completed and used by both agencies. May include a shared table of ID's between agencies.	a) Eric Meredith b) John Thunstrom	An MOU to create this matching process has been created and is making its

					way through the approval process
Research Parameters: Non-Credit and Non-Degree training data	A database for tracking non-degree and non-credit training/apprenticeships and other opportunities is needed	7/30/2025 / Ongoing	Establish a working database to track non-credit and non-degree data across the state	a) Chase Stahl Eric Meredith Kirk Lacy b) John Thunstrom	Work has been started on a database with Education Design Labs

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Office of the Commissioner of Higher Education

Research Project / Agenda Question #: 4, Which students from K-12 matriculate to colleges or universities, whether in Montana or out of state, and which students do not? Of the students not matriculating, are they leaving the state for education and/or workforce opportunities or are they staying in Montana? Of particular interest are outcomes of students with special needs, students classified as low socioeconomic status, and students of American Indian classification.

Principal Researcher: Eric Meredith

Principal Researcher Contact: emeredith@montana.edu, (406)449-9165

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Program Parameters: Authorization	Research appropriate authorization to create a direct communication of data between OPI and OCHE.	7/30/2025 / Ongoing	Review of Board of Regents, Legislative, Board of Public Ed applicable statutes and completion of MOU between agencies	a) Eric Meredith b) Tyler Trevor	Work on a MOU is in process now.
Research Parameters: Data Access	Work with IT divisions at the state, school and agency level to create a means of data communication between agencies	7/30/2025 / Ongoing	Access to data is available to each agency	a) Eric Meredith b) John Thunstrom	A working tunnel is currently available between agencies to allow data sharing.
Research Parameters: Matching students	Without a common ID used by both agencies an agreed upon method of	7/30/2025 / Ongoing	Agreed upon method of matching students is completed and used by both agencies. May	a) Eric Meredith b) John Thunstrom	An MOU to create this matching process has been created and is making its

	matching students is needed.		include a shared table of ID's between agencies.		way through the approval process
Research Parameters: Out of State Data	Using the Student Tracker Service from the National Student Clearinghouse to identify and track students attending Post-Secondary school outside Montana	7/30/2025 / Ongoing	Final Transfer table of all students and where they are attending inside or outside of Montana	a) Eric Meredith b) John Thunstrom	Transfer data from NSC has been obtained by OCHE and is now being built into an usable data table.

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Office of the Commissioner of Higher Education

Research Project / Agenda Question #: 8, How might Montana establish improved data connections across K-12 and higher education to support student success in federally funded programs that span K-12 through higher education?

Principal Researcher: Eric Meredith

Principal Researcher Contact: emeredith@montana.edu, (406)449-9165

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Program Parameters: Authorization	Research appropriate authorization to create a direct communication of data between OPI and OCHE	7/30/2025 / Ongoing	Review of Board of Regents, Legislative, Board of Public Ed applicable statutes and completion of MOU between agencies	a) Eric Meredith b) Tyler Trevor	Work on a MOU is in process now.
Research Parameters: Data Access	Work with IT divisions at the state, school and agency level to create a means of data communication between agencies	7/30/2025 / Ongoing	Access to data is available to each agency	a) Eric Meredith b) John Thunstrom	A working tunnel is currently available between agencies to allow data sharing.
Research Parameters: Matching students	Without a common ID used by both agencies an agreed upon method of matching students is needed.	7/30/2025 / Ongoing	Agreed upon method of matching students is completed and used by both agencies. May include a shared table of ID's between agencies.	a) Eric Meredith b) John Thunstrom	An MOU to create this matching process has been created and is making its way through the approval process

Program Parameters: Data Needed by Programs	For each federally funded program a determination needs to be made about exact data needed.	7/30/2025 / Ongoing	Final review by federal programs in both agencies of data needed for their respective programs	a) Eric Meredith b) varies by program (Perkins, Gear Up, Talent Search)	

Office of Public Instruction

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Office of Public Instruction

Research Project / Agenda Question #: 3. Does Montana provide K-12 completers, specifically students and individuals with special needs, validated programmatic opportunities for success in the postsecondary and workforce environment?

Principal Researcher: Special Education Director and SPED Data Specialist

Principal Researcher Contact: State emails

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Internal data collection- What does OPI already have or not have	Data, program, and leadership meetings to review research findings	Aug 2025-September 2025	All relevant internal data or lack of data inventoried	Special Education Unit and Data Section in coordination with superintendent's office	Much of the data needed for the research question can be pulled from longstanding federal reports and plans
Assist local districts with post-secondary transition plans for adult students with disabilities	State settled lawsuit with DRM: messaging went out to districts and effected students regarding public education services until age 21. OPI/OBPP made bridge funding available to districts.	Aug 2025-ongoing	Number and percentage of special education students exiting public school with a successful transition plan	Superintendent's office, OPI legal, OPI SPED, OPI Data, school districts, community partners	

	OPI developed guidance documents, will continue refining guidance and resources, and will work to secure stable funding.				
OPI in collaboration with the Legislature, BPE, and stakeholders have begun developing guidance, updated policies, and are drafting legislation	Payments went out to districts. OPI and stakeholders evaluating paths for alternative content standards.	June 2026-ongoing	Successful review of 2026-2027 school year data (first full year of implementation) and successfully updating law and policy then developing guidance and resources around our findings	Superintendent's office, OPI legal, OPI SPED, OPI Data, school districts, community partners, BPE	

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Office of Public Instruction

Research Project / Agenda Question #: 5, What is the relationship between K-12 CTE concentrators and entrance and immediate success in a Montana Department of Labor & Industry apprenticeship program, work-based certificate program, or industry-recognized credential program, or entrance and immediate success in a Montana University System college-level certificate program?

Principal Researcher: Shannon Boswell (CTE director) and Shara Blair (data specialist)

Principal Researcher Contact: State emails

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Internal data collection- What does OPI already have or not have	Data, program, and leadership meetings to review research findings	Aug 2025- November 2025	All relevant internal data or lack of data inventoried. Next steps will be driven by findings this fall but will involve further state research and guidance.	Shannon Boswell and Shara Blair in coordination with superintendent's office	Much of this research coincides with existing Perkins and Future Ready work being done this fall by OPI, OCHE, and DLI.
Successfully roll out Future Ready program and align state initiatives	Partner with DLI and OCHE to roll out the IRC and dual credit lists, market program, provide targeted guidance, prepare data systems	Sept 2025- ongoing	Utilized federal comp center contract with EDNW for facilitation, provided feedback to DLI and OCHE, updated WBL guidance, aligned Perkins/WIOA, updated data systems, began marketing	Superintendent's office, OPI CTE, OPI Data, OPI Finance plus external partners	

Hire a Future Ready Data Specialist to begin working with school districts	Data system changes have been completed and communicated prior to the hiring of this individual	July 2026-ongoing	Hiring of the Future Ready Data Specialist, begin collecting, reporting, and analyzing data for policy decisions	Superintendent's office, OPI CTE, OPI Data, OPI Finance plus external partners	

Research Project Timeline and Tracking Form

Adopted: 6-30-25

Update: July 16, 2026

Agency: Office of Public Instruction

Research Project / Agenda Question #: 9. What is the relationship between K-12 math completion and academic entry and success in the Montana University System?

Principal Researcher: Marie Judisch (senior manager for academic outcomes and instruction) and Data Section staff

Principal Researcher Contact: State emails

Stage Goal / Objective	Activities / Initiatives to Meet Stage Goal / Objective	Start Date / End Date	Measure or Evidence of Stage Completion	Person/s Responsible: a) Stage Execution b) Stage Review	Comments
Internal data collection- What does OPI already have or not have	Data, program, and leadership meetings to review research findings	Aug 2025-October 2025	All relevant internal data or lack of data inventoried	Marie Judisch Data Section staff in coordination with superintendent's office	Although current data limitations prevent a fully comprehensive view, we have identified several promising pathways to initiate the work—pathways that could be further strengthened through the enhanced datasets generated by the data modernization project.

Implement new 2026 math content standards, incorporate HQIM, increase math proficiency and post-secondary alignment, expand CTE math options	Prepare for July 2026 math standards rollout incorporating HQIM, analyze MAST math proficiency data trends, pass BoE resolution on math attainment, analyze MUS math data	Nov 2025-ongoing	Increase in student proficiency in math, number of math courses completed, lack of remediation, diverse course offerings	Superintendent's office, OPI Programs, OPI Data, external partners	
Schools are being held accountable to new math standards as of July 1, 2026	Analyze accreditation report data as well as complementary assessment and accountability data	July 2026-ongoing	Develop policy recommendations and continue collaborating with the MUS and districts	Superintendent's office, OPI Programs, OPI Data, external partners	

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