A MULTISITE CASE STUDY OF STATE POLICY AND TEACHER PERCEPTIONS OF RECRUITMENT AND RETENTION IN RURAL SCHOOL DISTRICTS IMPACTED BY THE CRITICAL QUALITY EDUCATOR SHORTAGE

by

Hailey Suzanne Hancock

A dissertation submitted in partial fulfillment
of the requirements for the degree

of

Doctor of Philosophy

in

Education: Curriculum and Instruction

MONTANA STATE UNIVERSITY
Bozeman, Montana

December 2020

©COPYRIGHT

by

Hailey Suzanne Hancock

2020

All Rights Reserved

DEDICATION

To Joey and our children, thank you for going on this adventure with me, and for continuing to inspire me and make me laugh.

To the youth and educators of Montana–you are the pillars of our communities–thank you for persevering and innovating. We must do better to support you.

ACKNOWLEDGEMENTS

I am thankful for the support of my committee, Dr. Downey, Dr. Lux, Dr. Schmitt-Wilson, and especially my Advisor, Dr. Christine Rogers Stanton. You always knew exactly how far to push me, while also respecting my other responsibilities. I appreciate your dedication to me and my work. I would also like to thank the participants in this study who inspired me through their stories, and their continued service to students. I would like to thank the professionals at the Office of Public Instruction and the Montana legislature who provided advice and documents to support this project. While we must continue to progress, so that we can better meet the needs of all our students, I recognize the work you have done and continue to do—thank you for your service to Montana. Next, I would like to thank my cousin, Mark Lancaster, who unofficially served as my legal expert, my brother, Ian Eck, who formatted my proposed theoretical framework, my editors, and the Montana State librarians. I would also like to thank my extended family, many of whom call Montana home, for engaging in conversations about education, and encouraging me. Thank you to all of our childcare providers, especially my parents and first teachers, Earline and Kermit Eck. Finally, I would like to acknowledge the students, teachers, administrators, and mentors I have worked with over the years, who challenge me and motivate me. This includes but is not limited to, Kris Stanec, Katy Lapp, Derek Carlson, Connie Vincent, Amy Gutierrez, Karen Roberts, Danielle Lopez, Jennifer Magner, Brad Kahrs, Danielle D'Ascenzo and the KMCP 6th grade team, Lindsey Morgan Lorehn, Gordon Grissom, and my Bozeman colleagues.

TABLE OF CONTENTS

1. INTRODUCTION 1

Introduction 1
Problem Statement 5
Purpose Statement 7
Research Questions 6
Significance of the Study 8
Theoretical and Conceptual Frameworks 10
Research Design Overview 12
Definitions of Terms and Concepts 14
Assumption, Delimitations, and Limitations 18
Chapter Summary 19

2. LITERATURE REVIEW 20

Introduction 21
Theoretical Framework 21
The Uniqueness of Rural Places 26
Rural Teacher and Student Characteristics 32
Teacher Recruitment and Retention 36
A Brief History of Montana School Finance: From 1864–1927 40
Montana School Finance: 1935–1972 45
Montana School Finance: 1989–2017 49
Columbia Falls v. State (2008): The Progress of the State 55
Chapter Summary 56

3. METHODOLOGY 58

Introduction 58
Researcher Positionality 58
Research Questions 60
Research Design 61
Rationale 62
Ethical Considerations 63
Data Collection and Analysis Procedure 64
Data Trustworthiness 71
Critical Policy Discourse Analysis Framework 73
The Montana Constitution (1972) Article X, Section 1 75
Argument Reconstruction 76
Interdiscursive Analysis 78

TABLE OF CONTENTS CONTINUED

Participants and School Site Context....80
Participant Biographical Information....84
Chapter Summary....88

4. FINDINGS....90

Introduction....90
Findings....93
Theme 1: The Sociological Dimension of Place: Recognizing Responsibility....93
Introduction to Theme....93
How Montana Views Public Education: The Responsibility of the State and Local School Boards....93
Argument Reconstruction....95
Interdiscursive Analysis....98
Teacher Perceptions: "The Small School Setting Really has Some Advantages"....100
How the Culture of the Town and School Attracts or Repels Teachers....100
Collaboration: How Relationships Help Recruit, Develop, and Retain Teachers....109
Theme 2: The Political Dimension of Place: Advocating for Economic Efficiency and Economic Growth....111
Introduction to Theme....111
An Appeal: Adequate Funding Based on Educationally Relevant Factors....112
Argument Reconstruction....113
Interdiscursive Analysis....118
Teacher Perceptions: "We've had a lot of turnover in the last couple of years, but it's been a one way street"....120
Recruitment and Retention: How Economics Create Opportunity and/or Challenges for Teachers....120
Economic Decline or Economic Growth: Creating Uncertainty for Teachers and School Systems....128
Local Politics: The Complications of Place....133
Theme 3: The Perceptual Dimension of Place: Believing in Equality of Opportunity....136
Introduction to Theme....137
Reviewing the Progress: Is There Equality of Opportunity?....137
Argument Reconstruction....139

TABLE OF CONTENTS CONTINUED

Interdiscursive Analysis....142
Teacher Perceptions: "There always seems to be a shortage of money" 148
School Funding and Personal Finances: Unequal Opportunities....149
Professional Capacity Building: The Responsibility of Administrators and Systems to Provide Opportunities to Support Teachers 157
Theme 4: The Ideological Dimension of Place: Aspiring for Quality....161
Introduction to Theme....161
Quality Education: What it is–The Accreditation Standards....162
The Montana Code Annotated: Accreditation, Curriculum, and School Funding....163
The Administrative Rules of Montana: School Accreditation, Standards, and Procedures 166
Teacher Perceptions: "Every time you recruit a new teacher it costs thousands of dollars…You have to start over from square one." 173
Induction, Mentoring, and Professional Development: An Effort (or not) To Provide Opportunities for Teacher Growth 179
Theme 5: The Ecological Dimension of Place: Engaging in Systems of Power 189
Introduction to Theme....189
Who has the Power? State Policy Addressing Teacher Recruitment and Retention from 2005–2019....190
Teacher Perceptions: "If the workload was more reasonable" 196
Chapter Summary 203

5. CONCLUSIONS AND IMPLICATIONS....204

Introduction....204
"It would be helpful if more could be done to ease these problems": A Divide Between Rural and Non-Rural Schools……205
"They just don't get it": The Disconnect Between Policy and a Teacher's Reality……209
"They're sticking band-aids on all of this": Short-Term Solutions to Systemic Challenges 215
The "Don't mess up kind of environment" and the "Super supportive" District: Teachers Want Respect....219

TABLE OF CONTENTS CONTINUED

Theoretical Implications 224
Practical Implications.....230
Future Research 235
Chapter Summary 236

REFERENCES CITED.....240

APPENDICES 260

APPENDIX A: IRB Exempt Application.....261
APPENDIX B: Sampling Specifications.....271
APPENDIX C: Semi-structured Interview Questions.....274
APPENDIX D: Follow-up Questionnaire for Interview Participants.....279
APPENDIX E: Codebook.....285

LIST OF TABLES

Table Page

1. Community and school demographics 82

2. Personal and professional background information from interviews and surveys 83

3. Professional and financial background information from interviews and surveys 84

LIST OF FIGURES

Figure Page

1. Problem statement.....5

2. Multiphase participatory design: A multisite case study and critical policy discourse analysis.....65

3. Data analysis processes.....68

4. Fairclough & Fairclough's (2012) proposal for the structure of practical arguments.....75

5. Argument reconstruction, the Montana Constitution.....77

6. Key findings aligned with themes.....92

7. Argument reconstruction, Columbia Falls v. State (2004).....96

8. Argument Reconstruction, Columbia Falls v. State (2005).....113

9. Argument reconstruction, Columbia Falls v. State (2008).....139

10. Montana state education policy established in the MCA and ARM..... 163

11. The Place-Conscious Social-Ecological Model: A new perspective for education policy.....229

ABSTRACT

The purpose of this qualitative multisite case study is to explore the history of school funding and policy in Montana K–12 schools with a focus on how the State legislature is or is not providing equality of educational opportunity. Because teachers are the most significant school-related factor on student performance, the analyses will focus on data involving recruiting and retaining highly qualified teachers in rural contexts. This case study occurs from 2004–2019 when school districts sued the State legislature in Columbia Falls v. State of Montana (2004/2005) for not providing an adequate education. The Montana legislature revised their school finance model and, while the State claims the funding is sufficient, Montana continues to face a critical quality educator shortage in rural communities. Since 74% of Montana schools identify as rural this is especially problematic.

Critical place-conscious theory was applied to the multisite case study, which consists of five interconnected phases where the semi-structured interviews influence critical policy discourse analysis. The study focused on two rural school districts impacted by the educator shortage, identified as the Glacier and Yellowstone[1] sites. Findings demonstrate that there is a disconnect between Montana policies addressing teacher recruitment and retention, and the reality of educators' professional lives. The unsustainable workloads of teachers, inadequate staffing, low-compensation, and unaffordable housing are all challenges faced by Montana teachers. Rurality is not the primary cause of these challenges rather these issues appear to be systemic. A major conclusion is that teacher attrition impacts the quality of education students receive therefore equality of opportunity does not exist between rural and non-rural schools in Montana. Local school districts are integrating place-conscious solutions to fill this opportunity gap such as teacherages and innovative scheduling, however, not all schools have the financial capacity or leadership to do so, therefore the Montana legislature has a responsibility to provide more funding to schools impacted by the critical quality educator shortage. Furthermore, a new framework, the Place-Conscious Social-Ecological Model, is suggested to create education policy that values Montana's rurality.

[1] Both Glacier and Yellowstone are being used as pseudonyms in this study. The pseudonyms were chosen because they are both significant places in Montana, and place is central to this study. The pseudonyms do not mean that these schools are near these beautiful places.

CHAPTER ONE

INTRODUCTION

Introduction

Research shows that teachers are the number one, school-related factor impacting student learning (Darling-Hammond, 2014, 2016; Hanushek, 2016; Hattie, Masters, & Birch, 2018; National Commission on Teaching and America's Future, 2016). Teacher compensation also constitutes the largest portion of K–12 school district budgets (Hanushek & Rivkin, 2006; Odden & Picus, 2014; Office of Public Instruction, 2020). Since staffing is a substantial factor in a school budget, it continues to be an issue of contention, although stakeholders agree highly qualified teachers (HQTs) are essential in schools (Azano & Stewart, 2015; Clotfelder, Ladd, & Vigdor, 2007; Ingersoll, 1999; Ingersoll & Perda, 2010). This dissertation focuses on Montana's history of providing adequate and equitable funding so all K–12 students have the equal opportunity to pursue a quality public education. This study specifically explored the impact of policy on practice to better understand the recruitment and retention of teachers in rural contexts.

Recruitment and retention are important because of the correlation between a HQT and student achievement (Darling-Hammond, Newton, & Wei, 2013; Ronfeldt, Loeb, & Wyckoff, 2013). The correlation implies that an effective teacher increases student learning and a less effective teacher can negatively affect student learning while also recognizing that other factors, such as environment and student motivation, influence achievement (Darling-Hammond & Berry, 1999; Darling-Hammond & Youngs, 2002;

Hanushek, 1971). The positive effects of a teacher can extend beyond an individual classroom also known as the peer spillover effect: “An effective teacher (as measured by teacher value-added) also affects individuals who later share a class with the teacher’s students” (Opper, 2019, p. 1082). The spillover effect is both statistically and economically significant, “with an increase in the average quality of a student’s peers’ previous teachers being found to affect the student’s test score by around 50% as much as a similar increase in her own teacher’s quality” (Opper, 2019, p. 1082). The positive effects of a high-quality teacher even extend “into adulthood in terms of college completion, earnings, and wealth accumulation” (Player & Husain, 2018, p. 117). If teachers are so important, what are schools doing to recruit and retain HQTs?

Adequate resources, including competitive compensation packages, professional development, induction or mentoring, and enough staff so that workloads are manageable, are necessary to recruit and retain highly qualified teachers for students to succeed in school, future careers, and civic life (Darling-Hammond 2010, 2014; Odden & Picus, 2014; Ravitch, 2013; School Funding Interim Commission, 2016; Sutcher, Darling-Hammond, & Carver-Thomas, 2016). Hanushek and Rivkin (2012) define the funding and resources that support learning as inputs and the quality of instruction or student achievement as outputs. This economic concept is known as a production-function, and it is used to analyze school finance models as well as how education policies contribute, or do not contribute, to student achievement (Ferguson, 1991; Ferguson & Ladd, 1996; Hanushek, 1986; Hanushek & Rivkin, 2004). The Coleman Report (1966) heightened the debate over the value of educational inputs and outputs,

including but not limited to, the value and quality of a teacher. Education stakeholders and legislators in Montana are also embroiled in this debate.

Since the establishment of the Common School System in 1865, the legislature has distributed funds to schools and teachers, and it has addressed teacher shortages across Montana (Malone, Roeder, & Lang, 1991; School Funding Interim Commission, 2016). In the late nineteenth and early twentieth centuries, policymakers identified rural education as problematic since rural people and communities were often viewed as inferior and backward compared to their urban peers (Biddle & Azano, 2016; Cubberley, 1912; Howley & Howley, 2010; Theobold & Wood, 2010). Throughout the mid-1900s, education stakeholders debated the purpose of rural education, asking were schools responsible for preserving rural life or to help students adjust to general society (Gruenewald & Smith, 2008; Sims, 1946)? In 1972, Montana delegates revised the state constitution, and in doing so, established that "equality of educational opportunity is guaranteed to each person of the state… The legislature shall provide a basic system of free quality public elementary and secondary schools…" (Mont. Const. art. X, § 1, cl. 1, 3.). The responsibility of the state was to develop the educational potential of all Montana students, rural and non-rural alike. Teachers were, and continue to be, essential to fulfilling this goal.

Throughout the 2000s, Montana created task forces and committees involving teachers, administrators, consultants, and politicians to address issues around K–12 teacher recruitment and retention. Despite these efforts, the shortage has not subsided, and in fact, some have even called the shortage a crisis (Jean, 1988; Sutcher et al., 2016).

Although there is a shortfall of empirical research addressing this reported "crisis," there is substantial news media coverage with anecdotal evidence supporting this claim. Scholars and practitioners also discuss the systemic challenges of teacher recruitment and retention, especially in rural areas (Azano & Stewart, 2015; Biddle & Azano, 2016; Reagan, Hambacher, Schram, McCurdy, Lordy, Higginbotham, & Fornauf, 2018; Sykes & Martin, 2019). In Montana, the legislature's 2015–2016 School Funding Interim Commission (SFIC) recognized teacher recruitment and retention as a top concern when it published that "Schools across Montana struggle with recruitment and retention in specific content areas, particularly special education, math, and career/technical education…" (2016, p. 24). These struggles are a historic issue, and since they continue to persist, new approaches to address teacher recruitment and retention are needed.

Findings from the study align with existing research, that recruitment and retention of teachers in rural areas is not just a "rural problem", rather, the challenges are systemic, and that high teacher turnover negatively affects student achievement and the culture of a school. Six out of seven participants in the study expressed that their workloads were overwhelming, and all of the participants explained how their local funding is not sufficient, so the state legislature needed to provide more funding, specifically for staffing and facilities. Increased state funding should support place-conscious policy solutions, such as teacherages, and creating sustainable teaching schedules with opportunities for in-school or virtual collaboration. I propose a new theoretical model, adapted from healthcare's social-ecological model (Glanz, Rimer, & Viswanath, 2015; Golden & Earp, 2012)—The Place-Conscious Social-Ecological

Model, which integrates public policy and place-consciousness to create a new space for education policy. The model and other conclusions are discussed in greater depth in Chapter Five. Currently, Montana state policy does not adequately address teacher recruitment and retention therefore inequitable educational opportunities persist, as summarized in the problem statement below.

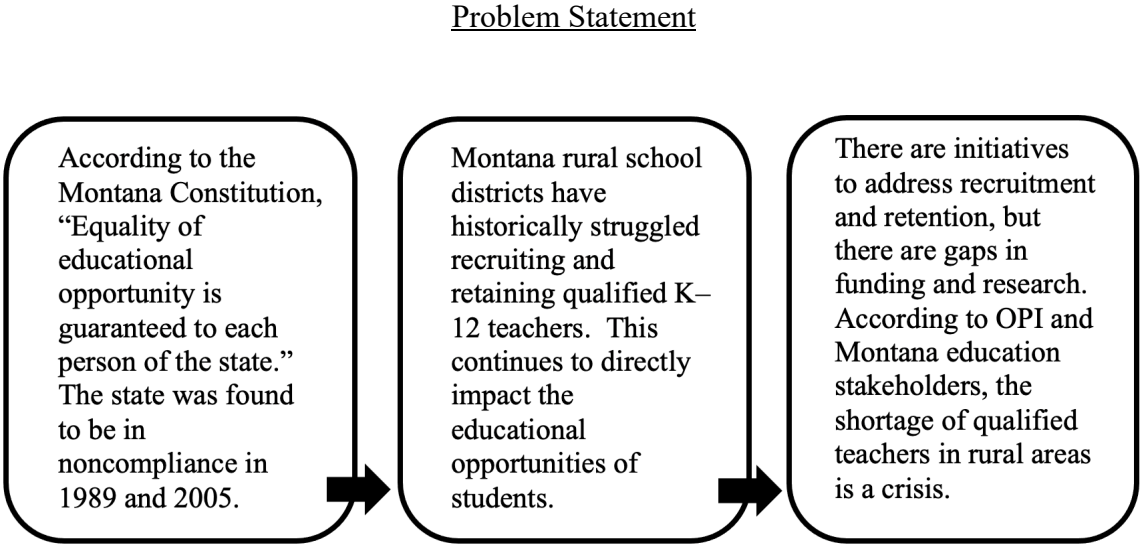


Figure 1. Problem statement

The phenomenon of recruitment and retention of K–12 educators is a historic issue that continues to dominate education state policy (Biddle & Azano, 2016; Malone et al., 1991; SFIC, 2016). Montana's SFIC (2016) identified several factors impacting recruitment and retention. Schools that are geographically isolated and/or that serve high-poverty populations have more trouble recruiting and retaining staff (OPI, 2013, 2019; SFIC, 2016). During the 2016–2017 school year, Montana was identified as having the greatest percent of public schools located in rural places, 74.4%, as classified by the U.S.

Census Bureau and 38.4% of the state education funds go to rural districts (Showalter, Hartman, Johnson, & Klein, 2019). During the 2018–2019 school year, the starting salary for Montana teachers remained the lowest in the country at $32,132 (NEA, 2020). While the OPI and education stakeholders have called recruitment and retention a crisis, even that terminology and thinking is problematic since a "crisis" implies that it is an emergency requiring short-term remedies. A review of Montana's history and rural education generally, suggests that teacher recruitment and retention is a systemic issue which requires complex, and long-term solutions—perhaps even a reimagining of school funding.

In 1989, the Montana Supreme Court ruled that the state's funding formula was inequitable and, in 2005, the Montana Supreme Court ruled that the state legislature's funding formula was inadequate. Since equitable and adequate educational opportunities are explicitly guaranteed in Montana's Constitution, the legislature was not in compliance with the state constitution. Thus, the legislature was obligated to revise the funding formula, and other initiatives, such as a loan forgiveness program and establishing induction programs. What remains unknown is how the history of school funding in Montana has influenced the recruitment and retention of quality teachers, especially in rural contexts. To address the gap, this study focused on the problem that Montana school districts are having a difficult time hiring and retaining HQTs, specifically in rural places, which directly impacts the educational opportunities of students.

Purpose Statement

The purpose of this qualitative multisite case study was to explore the history of school finance in Montana K–12 schools, with a focus on equity and adequacy to determine the ways in which the state was or was not providing equality of educational opportunity. Because teachers are the most significant school-related factor on student learning, the analyses focused on data involving recruiting, professionally developing, and retaining HQTs in rural contexts. Supporting teachers involves both economic and social factors, such as professional salaries and benefits, hiring enough staff so teacher workloads are manageable, and opportunities for collaboration with colleagues to develop curriculum and instruction. This study uses a critical place-conscious lens to explore how state policy and funding have been implemented in practice in rural schools in Montana.

Research Questions

The research questions for this multisite case study are listed below:

RQ 1. Is the State fulfilling its responsibility to provide equality of educational opportunity to students in rural schools through supporting teacher recruitment and retention?

RQ 2. What have been the outcomes, in terms of adequate support (funding, curricula, and accreditation) for teacher recruitment and retention in sample Montana rural school districts since the initial *Columbia Falls v. State of Montana* (2004/2005) decision?

A. How has state policy affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?

B. How has local policy, as perceived by practicing K–12 teachers, affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?

Significance of the Study

The Montana legislature and Office of Public Instruction (OPI) have declared that there are critical quality educator shortages (OPI, 2019). State and advocacy groups have consulted with Education Northwest (Yoon, Mihaly, & Moore, 2019) and Zogby Analytics (RISE4Montana, 2016) to gather data on the phenomenon; however, qualitative research focusing on rural schools is limited (Grimes, Haskins, & Paisley, 2014; McShane & Smarick, 2018; Monk, 2007). NCES's 2015–2016 data reports that rural schools' amount for 18.7% of the total number of schools in the United States[2] (Glander, 2017, p. 10). In Montana that is much higher, as rural schools serve 36.1% of the state's total 145,240 student population, and rural schools account for 604 schools out of 817 schools (Glander, 2017, p. 10). In 2017, OPI reported that "40 percent of the schools have fewer than 50 students…Eighty-one percent of the students are white, and 10 percent are American Indian. Other races make up the remaining nine percent. Thirty-five percent of the students are economically disadvantaged" (Kendrick & Cresswell, 2017, p. 7).

Nationally, graduation rates are higher for rural students than urban students; however, according to the High School Longitudinal Study (2013), fewer rural students attend and complete college. This is supported by recent high school graduation reports; according to the NCES's 2016–2017 data, the national average was that 84.6% of

[2] "Total number of students is the count of students enrolled on October 1 of the reported school year" (Glander, 2017, p. 11).

students earned high school diplomas in four years, and Montana surpassed that with 85.8% of students graduating in four years from high school (Education Week, 2019). In Montana, about 52% of public school students immediately start college the fall after they graduate, with the majority enrolling in the Montana University System (MUS) – the fourteen public, higher education institutions in Montana, including six four-year colleges and eight two-year and community colleges. Outside of the MUS, there are seven tribal colleges and three private colleges in Montana (Kendrick & Cresswell, 2017).

In the fall of 2016 "seventy-five percent of students who enrolled in MUS 4-year colleges in the fall of 2015 returned to college" which is above the national average for public universities (Kendrick & Cresswell, 2017, p. 14; NCES, 2018). While not all jobs require a college degree, there is a correlation between education levels and economic well-being for individuals and communities. Therefore, while the MUS is doing well retaining college students, it is important to also consider who is not attending college and why. Since rural students are less likely to enroll in or complete college, and Montana is a highly rural state, more attention must be given to rural K–12 education. This applies to civic life, too, when "according to American Community Survey data, the share of adults aged eighteen to twenty-four who are idle – that is, neither in work nor attending school – is higher in rural areas than in other locales" (Malkus, 2018, p. 25). This is problematic because idle adults are also more likely to live in poverty (Malkus, 2018). Montana and the United States cannot afford to ignore the needs as well as the strengths, of rural communities, in particular our schools and teachers. If Montana can

effectively recruit and retain HQTs, then it can better support the next generation of Montanans.

Theoretical and Conceptual Frameworks

This dissertation's research design is a qualitative multisite case study (Creswell & Creswell, 2018; Yin, 2018) bound by time and place, from 2004 to 2019 in Montana. Yin (2018) describes a case study as an "empirical method that investigates a contemporary phenomenon (the "case") in depth and within its real world context, especially when the boundaries between phenomenon and context may not be clearly evident" (p. 15). I applied critical place-conscious theory (Gruenewald, 2003a, 2003b) to focus on Montana and its local school districts, which, due to Montana's rurality, has unique needs compared to many other states (White & Reid, 2008). For example, Montana has over 400 school districts and 800 schools (OPI, 2019), and three-fourths of these are recognized as rural schools (Showalter et al., 2019). In comparison, Colorado maintains a rural population, but the majority of its schools are in non-rural areas with only 24% of schools recognized as rural (Showalter et al., 2019). In Colorado, there are just over 200 school districts and 1910 schools (Colorado Department of Education, 2019). According to the 2010 Census, Montana's population is less than one-fifth that of Colorado, while Montana's land area is 145,545.80 square miles and the population density is 6.8 people per square mile of land (U.S. Census Bureau, 2012a, p. 7). Montana does not even have a city with a population of over 250,000 (McCracken, 2016). Colorado's population is 5,029,196, land area is 103,641.89 square miles, and the

population density is 48.5 people per square mile of land (U.S. Census Bureau, 2012b, p. 7). This comparison of Montana to Colorado is an example of how diverse rural places are. While quantitative statistics make this evident, qualitative research provides the story behind the numbers.

The theoretical framework of critical place-consciousness supported the qualitative research design since data collection includes semi-structured interviews with teachers to provide insight into the cultures and values of the rural communities. For this study, the two rural communities have been identified as Glacier and Yellowstone. The school sites are not actually in the National Parks; the pseudonyms were chosen because of the significance of those places to Montanans. Place-conscious theory is also significant to this study because Section 8 of the Montana Constitution asserts "the supervision and control of schools in each school district shall be vested in a board of trustees to be elected as provided by law" (McCracken & VanBrown, 2018, p. 24). In Montana, the state legislature is responsible for allocating adequate and equitable funds so that each local school board has the ability to offer the students in their district equality of educational opportunity (MCA, §20-9-309). Gruenewald (2003a) recognizes that "place-consciousness complicates the single-minded pursuit of accountability, equity, and achievement by insisting on a connection between school and places" (p. 642). This is especially applicable to rural towns where schools are often the heart of a community. Without a school, or if a school consolidates with other local schools, the town may decline economically or socially (Tieken, 2014).

Further, the theoretical framework of critical place-consciousness (Gruenewald, 2003a, 2003b) was applied to the analysis of recruitment and retention of teachers. Gruenewald and Smith (2008) write that "place-based education can be understood as a community-based effort to reconnect the process of education, enculturation, and human development to the well-being of community life" (p. xvi). Place-based education positions students and teachers as engaged citizens who can individually and collectively participate and change their communities. My personal definition of place recognizes that places are constructed physically, and socially, by culture and power, which in turn affect everything including our personal identities, our communities, and society. Places shape us, and human-environment interaction influences places. When we share a place with others, we have the opportunity to create community thus place and community are inextricably linked. Therefore, it is appropriate that critical place-conscious theory was applied to this study of K–12 education policy and practice.

Research Design Overview

The qualitative multisite case study consisted of five interconnected phases: (1) review of state policy texts, (2) introductory interviews with rural teachers in two districts to establish the structure for the policy analysis, (3) review of local policy texts, (4) in-depth interviews in the same two districts to explore the policy analysis findings, and (5) critical policy discourse analysis (CPDA) of state policy. Phases two and four occurred with the teachers from the Glacier and Yellowstone[3] sites. As of 2018, Glacier was a

[3] Both Glacier and Yellowstone are being used as pseudonyms in this study. The pseudonyms were chosen because they are both significant places in Montana, and place is central to this study.

rural school district in a county that included multiple K–8 schools that fed into a county high school, grades 9–12, with a fluctuating student enrollment of 400-500 students in the entire county, and between 150-200 of those students attending the high school (OPI, 2019). Yellowstone was a rural K–12 school district that included one K–8 elementary and one 9–12 high school with an increasing student enrollment between 300-400 students K–12 (OPI, 2019).

During phase four, the in-depth interviews were with the same teachers from phase two. This participatory aspect aligns with critical place-conscious theory since the qualitative case study provides the opportunity for participants to influence the study, and it recognizes that teacher voices are necessary in order to holistically understand the phenomena under review. The semi-structured interviews with both early career and veteran teachers were used to understand why teachers stay or leave a district. By including both early career and veteran teachers, the study was designed to more accurately capture the uniqueness of the school sites and communities. The introductory semi-structured interviews (phase two) influenced the documents included in the CPDA (phase five); however, the teacher interviews did not solely dictate the CPDA. I recognized that policy is complex and that teachers may have limited exposure to state education policy, so I used a plethora of criteria to select and analyze the documents in the CPDA. Teacher input was just one of those. The teacher perspective on policy was especially valuable when discussing local policies since they had insider knowledge, which an outsider cannot easily access.

Phase five of the qualitative research utilized CPDA (Fairclough & Fairclough, 2012; Taylor, 2004). While other forms of discourse analysis were considered, CPDA was selected because it focused specifically on public policy. The CPDA explored economic, organizational, and policy texts provided by Montana's Legislature, the Office of Public Instruction (OPI), and other stakeholders in K–12 education between 2004 and 2019. In turn, the emerging themes from phase two influenced some interview questions that were asked during the in-depth semi-structured interviews in phase four. Through this study, I explored the impact of policy on practice to better understand the recruitment and retention of K–12 teachers in rural contexts. Specifically, I wanted to understand why teachers move to rural districts, what support they receive and why they think it is or is not valuable, and why teachers stay or leave rural school districts. Are state and local policies effectively supporting teachers?

Definitions of Terms and Concepts

Rurality is defined geographically by the U.S. Census Bureau (Malkus, 2018; Radcliffe, Burd, Holder, & Fields, 2018), which the National Center for Education Statistics has used since 2006 to define the locales of schools. A rural area is anything outside a city (large is more than 250,000; midsize is between 100,000 and 250,000; and small is fewer than 100,000), an urbanized area is 50,000 or more people, and a town is between 2,500 and 50,000. According to the U.S. Census, there are three categories of rural: fringe (less than or equal to five miles from urbanized areas), distant (more than five, but less than 25 miles from an urbanized area) and remote (more than 25 miles from

an urban area). However, upon further review, Montana legislators agreed in 2016 that "federal classifications for rurality/isolation are not a good match for Montana" because it does not thoroughly address issues of geography and time (SFIC, 2016, p. 23). For example, "criteria made some rural schools ineligible for the loan assistance program" (SFIC, 2016, p. 23). The new definition described isolated schools as:

- Driving distance or time from an urbanized area of urban cluster or creating a new designation, such as cities and towns with more than 10,000 people;
- Excluding those urban clusters with a population below 5,000 (for example) (McCracken, 2016, p. 3).

Then in 2019, OPI posted on their website that a school qualifies as being impacted by the critical quality educator shortage if the district cannot hire a qualified teacher, fewer than five candidates apply, and if "a public school that driving at a reasonable speed for the road surface, is located more than 20 minutes from a Montana city with a population greater than 15,000 based on the most recent federal decennial census[4]" (OPI, 2019). While this is not a formal definition of rural, it is a criterion created to enact policy that affects rural schools and teachers.

A *highly qualified teacher* (HQT) is defined by the state of Montana as "a full-time equivalent educator… who holds a valid certificate under the provisions of 20-4-106, MCA… is a licensed professional under 37-8-305, etc." (MCA, §20-4-502). OPI also uses this description to identify a "quality educator" when describing the details of the Quality Educator Loan Assistance program. Pedagogically, the definition of a quality

[4] OPI (2019) also noted, "OPI uses an analysis completed by the Montana State Library to determine drive time. Cities with population greater than 15,000 are Billings, Missoula, Great Falls, Bozeman, Butte, Helena, and Kalispell."

teacher and teaching quality will align with Marzano's (2017) teaching and learning progression, where teachers practice "effective application of instructional strategies," then recognize and engage "specific student mental states and processes," which leads to "enhanced student learning" (p. 5). The student processes are organized into three categories: feedback, content, and context. To be effective, Marzano argues, there needs to be a shift in perspective so that the focus of teaching needs to be on the students and not just the actions of the teachers. While teacher quality and teaching quality are interrelated, teacher quality has more to do with a "teachers' knowledge, skills, and dispositions" and teaching quality "refers to strong instruction that enables a wide range of students to learn" (Darling-Hammond et. al., 2017, p. 18).

Adequacy is defined in school finance terms as requiring "that each district receive sufficient funding to enable it to provide each child with an education that reaches a certain level of quality" (Odden & Picus, 2014, p. 19).

In this dissertation, *equity* will be used interchangeably with *equality of opportunity*, since that is an essential phrase of the Montana constitution. Fowler (2013) writes that "equal opportunity exists when everyone has a similar chance to get a good education or find a decent job, regardless of race, sexual orientation, handicapping condition, age, or national origin" (p. 97).

In 2016, schools labeled as impacted by the *critical quality educator shortage* met three criteria: "1. Rural isolation (based on locale codes used by the National Center for Education Statistics[5]); 2. Economic disadvantage (measured by percentage of students

[5] The definitions of rural isolation changed in Montana concerning education policy in 2016, 2017, and 2019.

participating in the free and reduced meals program); and 3. Low student achievement (based on the number of years a school has been under improvement status under the federal No Child Left Behind Act)" (SFIC, 2016, p. 23). The definition of a *critical quality educator shortage area* was updated in late 2019 after the passage of SB 211 to include (OPI, 2019, p. 3-4):

> (1) "Critical quality educator shortage area" means a specific licensure or endorsement area in an impacted school in which:
>
> (a) in any of the 3 immediate preceding school fiscal years a position was:
>
> (i) filled through the procedures set forth in 19-20-732 *(employment of retired teachers)*, 20-4-106(1)(e) (*Class 5 provisional certificate*), or 20-4-111 (*emergency authorization*) [6];
>
> (ii) filled from a candidate pool of less than five qualified candidates; or
>
> (iii) advertised and remained vacant and unfilled due to a lack of qualified candidates for a period in excess of 30 days; or
>
> (b) a vacancy for the current school year was advertised for a period of at least 30 days and the district received less than five applications from qualified candidates.

The term *local control* references a local school boards authority over curriculum and instruction as well as their fiscal capacity to maintain buildings, hire staff, or purchase resources (Darling-Hammond, 2010; SFIC, 2016).

Critical policy discourse analysis aims to critique both social and political, narratives and arguments in order to better understand the relationship between discourse(s) and "other elements of social life, including social relations (and relations of power), ideologies, social institutions, and organizations" (Fairclough & Fairclough, 2012, p. 78). *Discourse* is recognized as "language in social context"; policy is just one type of discourse and can be categorized even further (Fairclough & Fairclough, 2012, p.

[6] According to OPI, the italicized phrases in the definition were added for clarity.

78). For example, the *local policies* analyzed in this study were not necessarily written texts, but were represented through verbal agreements, norms, or codes. This is important for methodological clarification and also to provide insight to how rural places, schools, and policies shape each other in unique ways.

Other definitions relevant to the study can be found in the codebook, which is included in Appendix E.

Assumption, Delimitations, and Limitations

It is assumed that the study participants responded truthfully about their experiences teaching in a rural school and that the teachers have some knowledge about the local policies or issues related to recruitment and retention. At the beginning of the study, I assumed I would be able to access local policy texts because they are legally publicly available. However, documents such as school board minutes were not consistently available without having to disclose my identity, which in turn could have jeopardized the identities of my participants. Therefore, I did not critically analyze any local policy texts, which is a limitation. Another limitation of this study is that only two schools will be involved in the semi-structured interviews, while 421 schools qualified as being impacted by educator shortages when research for this study began (OPI, 2017). However, it is appropriate to focus on a small sample of schools, so that the tenets of critical place-consciousness can be applied meaningfully with integrity. There is no generic rural school, which is one of the challenges of creating education policy and reform. A delimitation is participant exclusion criteria. In this study, participants who are

teachers were included, while other community members such as administrators, school board members, parents, and students were not included. I focused only on teachers as participants because I wanted to explore the alignment between policy and practice without compromising the anonymity of my teachers. I was worried that if I included other participants from the same community that they may be able to identify my teachers, which could put the teachers in a compromising position. Also, teachers may have been more reserved during the interviews, especially if there were power imbalances, such as an administrator or school board member involved in the study.

Chapter Summary

K–12 teacher recruitment and retention need to be further addressed in Montana, especially in our rural schools. Public policy should consider the unique needs of rural communities, including both the strengths and challenges of rural places. This is especially important in Montana since 74% of schools and about one-third of students identify as rural (Showalter et al., 2019). All students deserve a quality education, which Montana students are entitled to according to our state constitution. However, because of the teacher recruitment and retention shortage, it is appropriate to ask whether or not students are receiving a quality education. For the social, political, and economic wellbeing of Montana, it is vital to ensure that schools are receiving adequate and equitable resources—in policy and practice. Chapter Two will provide an analysis of critical place-conscious theory, the history of education policy in Montana, and a review of the literature on rural education.

CHAPTER TWO

LITERATURE REVEW

Introduction

The purpose of this literature review is to further explain critical place-conscious theory, to explore rural education, to analyze teacher recruitment and retention trends, and to examine the history of Montana's school funding and education policies. Since modern policies are influenced by the traditions and laws of the past, this review will briefly describe education in Montana from 1864 to 1972. Then the review will focus on pivotal events, including, the revision of education goals in Montana's Constitution (1972), the *Helena Elementary No. 1 v. State* (1989) lawsuit and the development of the new funding formula, the creation of the Montana Code Annotated (MCA) 20-9-309 in 2005, and the *Columbia Falls v. State* (2004/2005, 2008*)* lawsuits. Reports from the OPI, legal documents, history texts, and peer-reviewed articles will be used to synthesize education stakeholders' efforts to address persistent discrepancies in the adequacy and equity of Montana's education funding[7]. While education policy is often place-agnostic, place-consciousness is central to creating and implementing meaningful education policy in Montana.

[7] Evidence or data from the OPI reports is usually self-reported by school districts; evidence from the legal documents is often coming from primary sources and the Findings of Fact in court documents; the history texts are secondary sources with references to primary sources, which I located and reviewed when possible. The peer-reviewed articles were located using library databases and included the journals: Education Policy Analysis Archives, The Journal of Education Research in Rural Education, The Rural Educator, Peabody Journal of Education, and publications from the American Educational Research Association. Since this study includes policy, history, and peer-reviewed scholarship it is important to note what was considered as evidence.

Theoretical Framework

A critical pedagogy of place (Gruenewald, 2003a) and critical place-conscious theory (Gruenewald, 2003b) is applied interchangeably to this dissertation's historical policy analysis of K–12 school finance in Montana. Gruenewald's framework is founded on the discourse of critical theory (Freire, 1970/2000; Horton & Freire, 1990); outdoor education, environmental, ecological, and rural education (McLaren & Giroux, 1990; Theobald, 2005). Gruenewald argues that place is inextricably linked to individual and community identity. Place is defined as an intersection of the individual and collective, the human and the natural, the physical and the cultural. In order to authentically form connections between place and identity, educators must recognize and confront "the ways that power works through places to limit the possibilities for humans and non-human others. Their place-based pedagogy must in other words, be critical" (Gruenewald, 2003a, p. 7). Gruenewald writes that opportunities for transformation develop when critical consciousness is applied. He believes that the values and unique characteristics of a place can impact all realms of individual and community life.

Examples of place-based pedagogy include teachers engaging with/in the community (outside the traditional classroom) to develop student understanding as well as relationships, such as science trip to a local watershed with conservationists or a social studies trip to learn about recycling programs in a county (Schuler, 2020). Place-based pedagogy also provides an opportunity for educators to "capitalize on the strengths and resources" of their community, including culture and history (Schulte, 2018, p. 16).

Finally, place-based pedagogy positions students "as learners who benefit from the expertise and funds of knowledge present in the places they inhabit, and create opportunities for them to give back to the community to further educational growth and development" (Dani, 2019, p. 51). In summary, place-based education is culturally relevant aligning with social justice teacher orientations that believe in developing student agency, beyond K–12 or P–20 contexts.

Place-consciousness can be applied beyond education, and it can be used as a lens to analyze society. Gruenewald (2003b) writes, "As centers of experience, places *teach* us about how the world works and how our lives fit into the spaces we occupy. Further, places *make* us: As occupants of particular places with particular attributes, our identity and our possibilities are shaped" (Gruenewald, 2003b, p. 621). However, Gruenewald asserts that education systems and school reform initiatives often neglect the uniqueness of place as an educational construct. Additionally, place-conscious theory recognizes "the larger cultural contexts of living; of which formal education is just a part" (Apple, 2001; McNeil, 2000, 2002; Spring, 1998; as cited in Gruenewald, 2003b, p. 620). Thus place-consciousness provided the framework to critically study Montana school finance policy as well as the communities involved in the multisite case study. The policies and the teacher interviews were analyzed through the following five dimensions of place: sociological, political, perceptual, ideological, and ecological (Gruenewald, 2003b; Greenwood, 2019[8]).

[8] Gruenewald and Greenwood are in fact the same person; Gruenewald changed his last name to Greenwood after 2009.

According to the sociological dimension of place, places are socially constructed, and are therefore cultural products. Gruenewald (2003b) writes, “Recognizing that places are what people make of them—that people are place makers and that places are a primary artifact of human culture—suggests a more active role for schools in the study, care, and creation of places” (p. 627). In this dissertation study, the sociological dimension of place was applied to the review of historic Montana policy as a means to understand other cultural events and phenomena that were occurring throughout the state and the nation when pivotal legislation was introduced and ratified.

Next, Gruenewald (2003b) introduces the political dimension of place. He writes that “entering politicized space suggests political roles for educators as meditators in the construction of culture, identity, and the places where they emerge” (p. 631). This could be very challenging for any teacher, but especially educators who are seen as “outsiders” that may be new to a rural community. Gruenewald also encourages educators to explore marginalization in their communities that may be a result of uneven development, economic exploitation, or cultural imperialism. Gruenwald cites hooks (1984,1990) who explores marginalization in relation to gender, race, and class, and she asserts that living in the margins is not all bad: “[M]arginality [is] much more than a site of deprivation … it is also the site of radical possibility” (hooks, 1990 as cited in Gruenewald, 2003b, p. 632). Gruenewald concludes that the political dimension of place challenges traditional models of accountability by encouraging a “multiculturalism that embraces ‘the spaces the difference makes’” (Gruenewald, 2003b, p. 633). In this dissertation, the political dimension was used to analyze how policies impact the demographics of Montana, with a

focus on socioeconomic classes and geography, and how demographics and geography influence policy.

Schools traditionally have a pattern of isolating teachers and schools—separating school life from community life (Dewey, 1900; Gruenewald, 2003a, 2003b). When there is a lack of awareness and appreciation of places, student development is limited. Therefore, Gruenewald suggests that the perceptual dimension of place has two main tenets, "First, people are capable of perceiving places and learning from that direct experience. Second, our ability to perceive places can be either thwarted or fostered by educational experience" (Gruenewald, 2003b, p. 625). Throughout the policy analysis, this study considers how legislation was supported or halted by the experiences and positionality of those involved. Perceptions of place impact what stakeholders prioritize.

The fourth dimension of place is ideological, which merges critical geography with spatialized critical social theory. Gruenewald (2003b) cites Foucault (1980) and Lefebvre (2009) when explaining that "spaces and places are expressive of ideologies and relationships of power" (p. 628). Therefore, place is both a reflection of society and develops society. The review of Montana legislative history offered in this dissertation reflects on the relationship between rural schools and non-rural schools in Montana. Traditionally, education policy targets the needs of non-rural education systems, so it is interesting to see how Montana approaches this issue.

Finally, the fifth dimension of place, the ecological, integrates values of bioregionalism (Berry, 1992) and ecofeminism (hooks, 1984; Warren & Cheney, 1991) Bioregionalists believe that humans should live within ecological limits—a value that

often conflicts with capitalism and globalization—but that is essential to environmental sustainability. Gruenewald (2003b) writes that ecofeminists

> recognize that historical patterns of domination and control over women (and other marginalized groups) are connected to patterns of domination over the land…They contend that "nature" and "woman" are related social constructions that reflect relationships of power, and that patriarchal, capitalistic societies have constructed both nature and women as something "other" to have "power over" (p. 635).

Both bioregionalists and ecofeminists confront socially constructed systems of oppression. In Montana environment protection and conservation is especially important, given the reliance on the environment for agricultural industries, tourism, and recreation—all essential to rural communities. Therefore, this study uses the ecological dimension of place to synthesize the historic trends and the impact of policy on marginalized groups. Finally, this study explores how the ecological dimension of place in education has similarities with the social ecological model (Glanz, Rimer & Viswanath, 2015; Golden & Earp, 2012) often used in developing healthcare policy.

Gruenewald recognizes limitations to his five dimensions of critical place-conscious theory. He acknowledges that a more comprehensive framework would include discussion of Native American and other Indigenous traditions as well as other academic disciplines such as psychology or sociology. In 2019, Greenwood published a response to the controversies around critical place-consciousness. This includes a conversation on decolonization and reinhabitation as well as how Greenwood's conceptual understanding of place has expanded to include at least 12 dimensions of place[9]. While it will be

[9] Greenwood (2019) suggests the following dimensions of place: perceptual, ecological, sociological, ideological, epistemological, political, economic, ethical, inner, interscalar, animistic, and aesthetic.

valuable to apply in future research, this study continues to focus on the five core dimensions of place: social, political perceptual, ideological, and ecological.

The Uniqueness of Rural Places

There is no generic rural community (Biddle & Azano, 2016; Corbet, 2016; DeFeo & Tran, 2019; Schafft & Jackson, 2010; Schmitt-Wilson, Downey, & Beck, 2018; White & Reid, 2008). The community identity makes each rural place unique. As social and economic contexts change, so does the concept of rurality (Biddle & Azano, 2016; Howley & Howley, 2010). However, rural places do share certain inherent characteristics, including small populations, sparse settlement, narrowness of choice or conveniences (i.e. shopping, schools, medical services), distance from population concentrations, and an economic reliance on the land such as agriculture, timber, mining, or tourism industries (Lavalley, 2018; Monk, 2007; USDA, 2017, 2019). Monk describes the positive attributes as often including beauty and serenity, a strong sense of community, a growth in rural economies after the 1990–1991 recession (and more rapidly than those in urban areas), and high property-tax values in rural areas, which then support the schools. Monk writes about rural economies that have a direct connection to rural schools:

> The economic base of rural communities tends to be place-bound (i.e., agriculture meat packing)…the rural economic base may be shifting to include more industries that are place-bound and that make use of low-skill workers. Such shifting has far-reaching effects for the schools in general (p. 156).

With more low-skilled workers, there may be more students living in poverty, which increases the need for social welfare services that may or may not be available in a rural place. Low-skilled workers may also be more transient, which can erode the sense of community found in established rural towns. A lack of competitive or higher-paying jobs may also lead to a "brain drain" where a rural community's best and brightest choose to leave the community post high school (Carr & Kefalas, 2011; McShane & Smarick, 2018). However, this is not always the case. In some rural communities that are able to offer better paying jobs or a desired lifestyle there have been "brain gains," such as in rural Minnesota and Nebraska (Crabtree, 2016; Cromartie, von Reichert, & Arthun, 2015; Winchester, 2012) In summary, Monk (2007) emphasizes that it is important to consider both the strengths and challenges of rural communities and that the demographics of rural places are changing.

Traditionally, the plights of urban education have dominated policy discourses (Biddle & Azano, 2016; Lavalley, 2018; Showalter et al., 2019). However, in response to the election of President Trump and changing demographics across the nation, there is an emergence of interest in rural places and education, which is important in order to understand the challenges of education reform (Howley & Howley, 2018). While there is no one profile for rural communities, statistically speaking the majority of rural residents identify as white and older, and over 80% identify as Christian. Dahill-Brown and Jochim (2018) write that rural communities often identify as lower and working class, a majority voted Republican in the last presidential election, and "people in rural communities are more likely than suburban and urban residents to express deep distrust of government

institutions, holding them at least partly accountable for the hardships of recent decades" (p. 64). Dahill-Brown and Jochim (2018) explain that this distrust can turn into a feeling of disrespect and even resentment toward the news media, political leaders, and members of suburban or urban communities. Members of rural communities may feel that policies and services too often focus on the needs of others. It is especially important for outsiders of a rural community to recognize this dissonance, and to understand how the close-knit community and values associated with rural places are also an asset.

McShane and Smarick (2018) describe the importance of looking holistically at a place, suggesting that "any serious study of rural education must move beyond a deficit mind-set and focus on building on the strengths of rural communities and citizens who inhabit them" (p. 5). For teachers, integrating place-conscious pedagogy (Gruenewald, 2003b) also supports the notion that rural places have resources—that by building on student experiences, teachers can view place as an asset (Biddle & Azano, 2016; Reagan et. al., 2019). Concerning the rural communities that schools are part of, Dahill-Brown and Jochim (2018) write that "while only 57 percent of respondents living in cities believe that their neighbors shared their values, 74 percent of rural respondents did," which implies that rural places may have greater social cohesion. This makes it easier to pass local policies or decisions for which a school board may lobby. Shared values may also unite schools even if students live farther apart from one another. This is evident in the "unusual level of pride—their history, culture, traditions, work, and more" that McShane and Smarick (2018) identify as an asset of rural communities (p. 5). There are many celebrations regarding academic performance and children's educational

aspirations as well (Howley, 2006; Lavalley, 2018; Showalter et al., 2019). On average, rural kindergartners arrive more prepared to learn and have higher graduation rates than their urban peers (McShane & Smarick, 2018). On the National Assessment of Educational Progress (NAEP), rural fourth and eighth graders outperform urban fourth- and eighth-grade students in math, reading, and writing (Malkus, 2018).

Concerning achievement, policymakers and taxpayers reflect on the dollars being spent to support student learning. There are several concepts that are essential to understanding school finance in general: per-pupil expenditures (PPE)[10], economies of scale, property assessments, levy rates, and cost-of-living adjustments (Shuls, 2018). These concepts help explain why, despite pride in their community, rural schools may struggle to meet staffing, resource, and facility needs. Schools receive money for their students from the government and often receive more money based on students' needs such as qualifying for special education and/or qualifying as an English Language Learner. This leads to economies of scale—the concept that the districts with more students benefit.

Once a school district's budget is set, traditionally PPE is the metric used to compare the funding levels between districts. PPE includes all operating expenses divided by the number of students. PPE is somewhat deceiving, though, since "the low-spending district may actually provide better educational options than the high-spending school districts and simply have a lower PPE by virtue of having more students" (Shuls, 2018, p. 102). In Montana, most rural remote schools appear to have a high PPE, but

[10] In Montana this is referred to as Average Number Belonging or ANB.

there are fewer students, and a large portion of the budget is spent on transporting students. Shuls warns not to just look at PPE when making policy decisions or conducting policy analysis, and instead to break down specific costs/expenditures.

Shuls (2018) goes on to describe the factors that impact school finance such as property taxes, which are divided into classifications such as personal, intangible, and real property.

> Personal property is described as property that is not affixed to a specific location, such as boats, cars, and farm equipment. Intangible personal property includes stocks, bonds, and the like. Real property includes land, permanent structures, and improvements to the land. (Shuls, 2018, p. 102)

The real property is especially important for school funding because it is broken down into three subclasses that are all appraised differently. The subclasses are residential; agricultural; and utility, industrial, and railroad property. Residential properties are appraised using a market or cost approach, which compares similar properties to determine the value of the residential property. Agricultural land does not use this approach, and instead assigns a grade to the farmland based on the quality of the land, which is then assigned a dollar value per acre. For example, in Missouri, the least valuable land is $31 per acre while the most valuable land is $1,035 per acre. Shuls (2018) found that "nearly 50 percent of all farmland is in the lower three grades… These practices require Missouri assessors to assess farmland at a rate that is lower than the market value of the property, a practice common throughout the country" (p. 104). Shuls (2018) found that, in Georgia, there was an estimated 80% reduction in property taxes based on similar policies. In Missouri, the U.S. Department of Agriculture (2016) valued

their farmland at $96.2 billion, but the assessment practices valued the property at $10.3 billion.

Another way that school districts generate revenue is through levies, or taxes that are proposed by the local school district to maintain, purchase, construct, or remove a building, and this is voted on by constituents (Odden & Picus, 2014; Shuls, 2018). While this measure is intended to close funding gaps, often the schools that need increased support are in the communities that do not pass levies or cannot afford to pass levies. Shuls identifies two trends that may influence the passage of a levy. First, older people who may no longer have kids in the school system are more likely to vote than younger citizens. Second, people of higher socioeconomic status and higher education levels vote more often than those with less education. Statistically, rural communities tend to have an older, less educated, and a working class population, so according to Shuls (2018), levies are unlikely to be passed.

In Montana, inequalities between regions with high property wealth and low property wealth are apparent when analyzing school mills. For example, in 2019, the Northwest region of Montana levies an average of 278.63 mills, North Central levies 263.32 mills, the Southwest levies 238.91, Central Montana levies 239.84 mills, and Eastern Montana levies 197.87 mills (Pattin, 2020). While Eastern Montana has less school mills levied "the total number of mills levied across the state is partially equalized by the statewide 95 mill levy and the 6 mill levy for the university system" (Pattin, 2020, p. 18). With less funding than urban and suburban schools, rural communities need to

advocate for efficient, innovative school funding policies that are place-conscious (Biddle & Azano, 2016; Schafft, 2016).

One innovative reform that has mixed results is the cost-of-living adjustment funds. State incentive programs often neglect to consider the unique needs of rural communities such as challenges recruiting and retaining teachers because a community is isolated and/or the pay is extremely low. Cost-of-living programs tend to favor urban/suburban schools. Yes, the rent or a mortgage will be higher in those areas, but when so much money is directed to those locales, then there is less for rural schools, which still need to ensure their teachers are paid as professionals. Because cost-of-living adjustments have favored urban areas, 27 states have passed funding for the "Small District Factor" to help rural schools address issues with staffing. However, according to Shuls (2018), "to date, no state has been able to do that very well. It may be that the task is impossible or politically infeasible" (p. 109). So, who are the teachers who stay in rural communities? What is keeping them?

Rural Teacher and Student Characteristics. Player and Husain (2018) used data from the NCES Schools and Staffing Survey (SASS), a nationally representative survey of teachers that was conducted every four years from 1987 until 2011–2012. In their data analysis, the SASS compared the teacher vacancies and characteristics of teachers in rural and non-rural schools, as defined by the U.S. Census Bureau. Concerning teacher vacancies, Player and Hussain (2018) found that nationally "rural schools were slightly less likely to report having at least one vacancy to fill (74 percent) than were non-rural schools (76 percent)" (p. 120). They infer that it could be due to the size and remoteness

of rural schools. There are fewer positions to fill, there could be a healthy supply of qualified teachers, or, it is difficult to fill the positions, so the school may be less selective. In both rural and non-rural schools, Science, Technology, Engineering, Mathematics, and English Language Learner (ELL) positions were the hardest to fill (Player & Husain, 2018). Montana's rural schools are disproportionately affected by teacher shortages, yet the subject areas that are hard-to-fill are similar (OPI, 2019).

Next, Player and Husain (2018) answered the question, "To what extent does the unique rural setting lead to a different type of teaching being in a rural classroom than a non-rural one?" (p. 123). Rural schools have fewer novice teachers than non-rural schools, and rural teachers are on average more experienced. This is significant because "teacher experience has been shown to influence teacher effectiveness" (Player & Husain, 2018, p. 124). However, the teachers at rural schools are less likely to hold a master's degree than teachers in non-rural locations. This could be because of access, state policies, or teacher preference. Finally, on average, rural schools have fewer teachers of color than non-rural schools, but this does vary by region (Darling-Hammond & Berry, 1999). In conclusion, while there are differences between rural and non-rural teachers, Player and Husain (2018) claim that the differences tend to be fairly small, so it is difficult to measure how the teacher characteristics influence their effectiveness in the classroom.

When analyzing how teachers are trained, rural teachers are less likely to graduate from a selective college or university than their non-rural peers; however, this does not necessarily mean they are less academically prepared (Lavalley, 2018; Player & Husain;

2018). More research needs to happen. Player and Husain (2018) also found that rural teachers are more likely to complete a traditional teacher training program that includes student teaching or an internship, while 13% of urban teachers participate in alternative licensure. Therefore, they conclude, "it does not appear that rural areas are using alternative certification programs to fill teaching vacancies" (Player & Husain, 2018, p. 124). Instead, many rural schools are trying to use the strategies of financial incentives such as housing stipends or loan forgiveness; "grow your own" in which students from the community come back to teach; paraprofessional development programs that provide a pathway to teacher licensure; creative induction programs such as the Alaska Statewide Mentoring Project (ASMP), which is a hybrid in-person/virtual mentoring program; and job modifications, which may have schools virtually share a teacher or utilize distance education to offer advanced courses (Lavalley, 2018; Player & Husain, 2018; Showalter et al., 2019).

Teacher Recruitment and Retention. Teacher recruitment and retention is an enduring problem (Biddle & Azano, 2016; Borman & Dowling, 2008; NCTAF, 2016; Nielson, 2002; Sutcher et al., 2016). Place complicates teaching, even though rural and non-rural schools may have seemingly similar challenges. Biddle and Azano (2016) write that:

> The lived realities of students, teachers, administrators, and community members happen within the context of a school, situated in a place, and in the current American system of public schooling, much of the local economic and social realities of the place determine the opportunities and constraints of local schooling (p. 316).

In the United States, the Institute of Education Science (2013) reported census data that "nearly one-fourth of K12 students, one-third of schools, and more than half of school districts are considered rural" (Reagan et al., 2019, p. 83). More than 40 states reported severe teacher shortages in specific subject areas (Darling-Hammond & Podolsky, 2019). Rural students are more likely to have limited access to quality teachers, especially in economically disadvantaged areas (Kaden, Patterson, Healy, & Adams, 2016; Krasnoff, 2014; Yarrow, Ballantyne, Hansford, Herschell, & Millwater, 1999). A HQT is one that is certified in their teaching field, additionally, factors such as a successful student teaching experience and completing a teacher education program, higher scores on teacher licensing tests, more than two years of teaching experience, or National Board certification, also increase the quality of a teacher (Boyd et al., 2008; Hanushek et al., 2004; Krasnoff, 2014). A longitudinal study of teachers in North Carolina found that "while each of these traits helped make teachers more effective, the combined influence of having a teacher with most of these qualifications… was larger than the effects of race and parent education combined" (Clotfelter, Ladd, & Vigdor, 2007, p.). So, what are schools doing to recruit HQTs?

The U.S. Department of Education estimates that teacher demand is on the rise through at least 2025, as student enrollment increases, policies shift pupil-teacher ratios in classrooms, and high teacher attrition persists (Sutcher et al., 2016).[11] When recruiting

[11] In the U.S. about 8% of teachers currently leave the profession annually, compared to high-achieving education systems such as Finland or Ontario, Canada where 3% to 4% of teaches leave annually (Sutcher et al., 2016). In 1992, only 5.1% of teachers left the profession, and this is still the case in some states such as Massachusetts, New Jersey, and Vermont where compensation and working conditions are recognized as stronger (Darling-Hammond & Podolsky, 2019).

teachers, school districts that conduct hiring earlier in the year and offer competitive compensation package are more likely to attract HQTs (Krasnoff, 2014; Sutcher et al., 2016). School districts successfully recruiting teachers also provide incentives such as signing bonuses, salaries that align with cost-of-living including affordable housing, adequate health and retirement benefits packages, reasonable workloads and planning time for instruction, and induction or mentoring programs (Darling-Hammond et al., 2017; Ingersoll & Strong, 2011; Reagan et al., 2019; Theobold, 1990). A study by Moeller, Moeller, and Schmidt (2016) found that "the availability of higher-salaries and more easily accessible resources (found in non-rural areas) pulled new teachers away from teaching or planning to teach in rural communities" (as cited in Reagan et al., 2019, p.90). Additionally, research suggested that the main barriers were not rurality in of itself—preservice teachers in the studies wanted to teach in rural communities—but the compensation was too low (Reagan et al., 2019).

One-third to fifty percent of early career teachers leave the profession within five years depending on their where they teach (Berry, 2004; Ingersoll, 2003; NCTAF, 2016). Teachers stay for the financial and professional reasons mentioned above as well as feeling valued by their peers, administrators, students, and/or the community (Darling-Hammond, 2010). School leadership and support are essential—veteran and early career teachers express different needs, but teacher perceptions of working conditions often influence whether they stay or leave—principals exercise significant power over school climate (Burkhauser, 2017; Ladd, 2011). For example, Tran and Dou (2019) found that "veteran teachers mentioned needing to have their voices be heard, while the new

teachers expressed greater needs for mentorship… and assistance with integration into the community (including experienced teachers who are new to the school)" (p. 144). When expert teachers were granted release time to mentor early career teachers, competency and retention increased (Ingersoll & Strong, 2011; NCTAF, 2016). Other factors affecting teacher retention include time to plan instruction collaboratively with colleagues and teacher autonomy over their classrooms as well as school level decisions (Krasnoff, 2014). Current research supports cultivating a professional community for teachers, especially in rural places where teachers may be more isolated, and to provide opportunities for teachers to build relationships with the larger community (Azano & Stewart, 2015; Rooks, 2018).

Teacher turnover is detrimental to student learning and achievement, as well as costly to school districts (Darling-Hammond et al., 2013; Ronfeldt et al., 2013). For example, the Alliance for Excellent Education estimated that during the 1999-2000 school year, "each case of teacher attrition costs a school system $12,546" which with over 170,000 nonretirees leaving education, cost nearly $2.2 billion to replace those teachers (Borman & Dowling, 2008, p. 368). In 2007, a NCTAF study estimated that the annual cost of teacher attrition may actually be upwards of $7 billion, and that does not account for the negative effects on students and their achievement (NCTAF, 2016).

The magnitude of teacher turnover requires systemic solutions to adequately address the issue. Sutcher, Darling-Hammond, and Carving-Thomas (2016) describe four policy initiatives to address teacher retention and recruitment, including competitive compensation packages that are also equitable across school districts in a state. With

increased funding from state legislatures, traditionally underserved school districts can compete with wealthier school districts to hire HQTs. Second, "enhancing the supply of qualified teachers for high-need fields and locations through targeted training subsidies and high-retention pathways" involves offering loan forgiveness and stipends for HQTs that commit to hard-to-staff schools, as well as "grow your own programs" where students from the area commit to returning to their community as teachers (Sutcher et al., 2016, p. 6). Third, schools need to improve mentoring, induction, working conditions, and career development, which requires more funding, training, and/or innovative scheduling. Finally, the federal government needs to collaborate with states, universities, and other education stakeholders in "developing a national teacher supply market that can facilitate getting and keeping teachers in the places they are needed over the course of their careers" (Sutcher et al.2016, p. 7). In conclusion, teacher recruitment and retention are an equity and social justice issue (Azano & Stewart, 2015; Darling-Hammond, 2010). In order for to close student opportunity and achievement gaps, all schools must be staffed with HQTs whose professional capacity is supported to deliver quality instruction—regardless of a school's geographic location.

A place-conscious example of state policy is the Alaska Statewide Mentoring Project (ASMP) which was effective in recruiting and retaining teachers in Alaska's rural K–12 schools. Adams and Woods (2015) found that the program, which is a hybrid in-person/virtual mentoring experience, had several themes among the teachers who stayed. Teacher efficacy themes included a love for Alaska (the place where they taught and lived), a feeling of being prepared for the lifestyle as well as curriculum and instruction, a

culture of professionalism and teamwork at school, socializing in the community through religious activities or hobbies, and, finally, being student-focused. Adams and Woods (2015) concluded that they would like to expand their study to a larger context and sample size. The success of the ASMP shows that teacher retention has increased from 67% in 2009 to 77% in 2015 at schools that participated in the program (McShane & Smarick, 2018). Mentoring and induction programs are associated with higher rates of retention of K–12 teachers across the United States and internationally, so the ASMP is significant in that it provides a potential model for other rural schools struggling to develop effective programs (Adams & Woods, 2015; Darling-Hammond et. al., 2017; Ingersoll & Smith, 2004; Kahrs, 2011; Sutcher, Darling-Hammond, & Carver-Thomas, 2016).

Finally, the concepts of job embeddedness (Mitchell, Holtom, & Lee, 2001; Watson, 2018) and place attachment (Kudryavtsev, Stedman, & Krasny, 2011; Manzo, 2005; Vanclay, 2008) affect teacher working conditions and satisfaction. These are two concepts that local districts and schools can directly address. Job embeddedness describes "a combination of attachment factors that offer an alternative explanation of employee retention" (Watson, 2018, p. 28-29). Watson (2018) studied the correlation between job embeddedness (JE) and teacher retention. She surveyed 143 early-career teachers (fewer than five years of experience) in Central California. She found that JE[12] does significantly

[12] There are six dimensions related to JE: organizational fit, community fit, organizational links, community links, organizational sacrifice, and community sacrifice (Mitchell et al., 2001a, 2001b, as cited in Watson, 2018). Fit refers to the perception of shared values and goals between the teacher and their school or community. Links refer to shared hobbies, interests, or relationships with school and community members. Sacrifice refers to the perception of stress (financial or emotional) that would be felt by the teacher if they left the school or community.

affect which novice teachers stay or leave. Examples of job embeddedness in education are providing mentors, recognizing accomplishments, hiring based on a “fit” with the job as well as the culture, providing financial incentives, providing in-house professional development, and supporting work-life balance (Krasnoff, 2014; Mitchell et al., 2001).

Place attachment “refers to the bond between people and places” including how an individual values a place (Kudryavtsev et al., 2011, p. 231). In education this is important to consider when hiring teachers—if there is a conflict between an individuals’ self-identity and the place where they teach, this could lead to negative attachments and attrition (Kudryavtsev, 2018). Therefore, schools and administrative leaders want to create opportunities for teachers to build positive place attachment. This dissertation reinforces the importance of early career and veteran teachers having a personal connection with both their school and the community if they are going to stay. Overall, the research on teacher recruitment and retention recognizes the importance of financial support, professional capacity building, and developing relationships both in school and the community. What does this mean for Montana?

A Brief History of Montana School Finance: From 1864–1927

Prior to the colonization and settlement of Montana by non-Indigenous peoples, many Indigenous Nations claimed the area as their home. The Nations acknowledged here have direct traditional and contemporary claims to the land where this research occurred—Apsáalooke (Crow), Niitsítpiis-stahkoii ᓀᐟᒧᐧᑯᐦ ᖁᖬᓂᐟ (Blackfoot / Niitsítapi ᓀᐟᒧᐧᒣᑯ), Očhéthi Šakówiŋ (Lakota), Piikani (Blackfeet), Seliš (Salish), Shoshone,

Shoshone-Bannock, and Tsétsêhéstâhese (Northern Cheyenne)[13]—many other Nations not listed here have ties to the area known today as Montana. The Indigenous peoples of Montana have shared and continue to share a history of sustainable place-conscious education. Once Montana was colonized, the "traditional" system of education was developed. Between 1864 and 1889, Montana functioned as a territory of the United States. In 1865, the Common School System[14] was established by Governor Edgerton and the Montana Territorial Legislative Assembly through Council Bill 38. Edgerton (1865) argued:

> … it is of the highest importance that the people should be so educated as to understand the hearing of public measures. A self-ruling people must be an educated people, or prejudice and passion will assume power, and anarchy will soon usurp the authority of government (as cited in Malone et. al., 1991, p. 358).

This is reflective of the sociological dimension of place and the values of culture. At the time, the common schools were operated by revenue generated by the school fund, which had three main sources of income. An "irreducible fund" that included money received from the sale of school lands; county property taxes, which became required to hire schoolteachers; and fines "arising from any breach of a law regulating license for selling liquors, keeping of bowling alleys or any billiard saloons, or of any penal laws of the Territory" were used to pay for school needs (Jean, 1988, p.9).

---

[13] I would like to thank Dr. Stanton for introducing me to land acknowledgements and for sharing her knowledge on the Indigenous Nations of Montana. I would also like to recognize the work of the team at Native Land Digital, https://native-land.ca, so that others may access their resources.

[14] This Common School System is the name given to public education systems in the territory of Montana by the legislature, and it is not a direct reference to Horace Mann's "common schools" of the mid-1800s (Urban & Wagoner, 2014), although the founders of this system in Montana may have been influenced by Mann's ideas.

Over several legislative sessions, recommendations were made to increase funding support for school operations, but it was not until 1872 that House Bill (HB) 6 was ratified. This bill raised the number of mills that were to be assessed in the county, and it created the voted levy. From 1872–1886, school leaders in Montana tried to increase funding for schools, but they had little success. The issue of school finance became more problematic as Montana passed compulsory school attendance laws in 1883 and 1889, ordering children ages eight to fourteen and then five to 21, respectively, to attend school. These laws increased the number of students attending schools. According to Malone et al. (1991), the first public schools were established in Helena in 1876, Bozeman and Deer Lodge in 1878, and Butte in 1879. During this time, the school term also expanded from three months to five months, and teachers were required to attend training to improve their instruction.

The United States Congress admitted Montana into the Union in 1889 along with North Dakota, South Dakota, and Washington. When Montana became a state, the new state constitution also expanded its political offices, including "the office of superintendent of public instruction elective and placed control of education in the hands of a State Board of Education, composed of the governor, the superintendent of public instruction, the attorney general, and eight citizen members appointed by the governor" (Malone et al., 1991, p. 360). This organization remained in place until 1972 when the Montana Constitution was revised.

At Montana's 1889 Constitutional Convention, an amendment was proposed to "disallow the sale of any lands and to require only the leasing of State lands… If the land

was only leased or rented, and annual payments made to districts then no money could be lost for the schools" (Jean, 1988, p. 39). This is an example of the political dimension of place where economic power is derived from places. The delegate who introduced the proposal also claimed to be concerned with the use of the land, "that once it was gone, it was gone" (Jean, 1988, p. 39). This also relates to the ideological and ecological dimensions of place-consciousness because a debate ensued in the legislature around the value of Montana's state land for economic purposes, providing revenue for the common schools as well as private industries such as logging, mining, and agriculture. The amendment was not passed, but in the 1891 legislative session, Governor Toole brought up the issue again. The State School Superintendent, John Gannon, wrote in his First Annual Report (1891, p.15–16):

> Depredations are constantly committed upon the school lands, and under the present law there is practically, no relief. Timber, which alone renders some of these lands valuable, is being removed; agricultural lands are probed in the hunt for stone, which will enable the finder to enter a mineral land claim; lands of the fourth class (this will be discussed below) are teeming with gold when it is discovered that they are valuable as town lots… the children of the State are being systematically robbed of that which should be regarded as a sacred trust (as cited in Jean, 1988, p. 42–43).

Gannon (1891) infers that children were being deprived of equality of opportunity to access a quality education due to inadequate funding which reflects the political dimension of place. He claims that the needs of children are marginalized due to the economic development of resource-rich land which recognizes how larger systems shape schools and support, or do not support, education, while also connecting to the ecological and ideological dimensions of place.

Since the majority of funding for schools was spent on teacher salaries, historically (Jean, 1988) and currently (McCracken, 2015; OPI, 2020), it is also worthwhile to note that the teaching profession experienced a feminization during the 1800s (Urban & Wagoner, 2014). While men dominated administrative roles and higher education, the number of women teaching in common schools increased. There are many reasons for this, but two are especially significant. First, it cost districts and states less to fund schools since women were paid considerably less than their male peers. Second, having women serve as teachers and men as administrators was "compatible with traditional male-female hierarchical relationships" where men are viewed as an authority, and women are viewed as subservient and nurturing (Urban & Wagoner, 2014, p. 99). Urban and Wagoner's (2014) summary of the feminization of education throughout the 1800s further demonstrates the political and ecological dimensions of place. Since common schools were primarily taught by female educators, it could be argued that male legislators did not view the adequate financing of schools as a priority.

During the early 1900s, there was a homestead boom in Montana that doubled the population of Montana students. This led to an increase in the number of small, rural school districts, which was positive for building communities but became a problem for the state when the agricultural industry struggled in the 1920s and during the depression. When communities could not financially support their schools, they started to consolidate school districts. However, in 1929, there were still 2,500 one- and two-room schoolhouses in Montana (Malone et al., 1991). In 1927 the State Common School Equalization Fund passed, which added the revenues of taxes on inheritance, oil, and

metals, and redistributed taxes by the State Board of Education in an effort to provide more equity. Prior to the passing of this law, local property taxes were the main source of funding for school systems, which had caused disparities in quality among schools and reflected the political dimension of place (Malone et al., 1991).

Adequate and equitable funding remained an issue for Montana. The first school equalization legislation was not passed until 1935, and it only provided about 20% of the costs that districts needed: "School districts, especially rural districts, had to rely heavily on district and county property taxes to support their schools. To compound these inequities, county levies were distributed to school districts based on school district population, not on actual educational or financial needs" (QSIC, 2006, p. 2). This demonstrates both political and ecological dimensions of place-consciousness. Industry leaders and policymakers had power over the natural resources, so those places became politicized. In turn, revenue from those ecological places was used to increase equity among schools, which required political decision-making.

Montana School Finance: 1935–1972

School equalization legislation was not passed until 1935, and it only provided about 20% of the costs that districts needed (Erickson, 2006).

> School districts, especially rural districts, had to rely heavily on district and county property taxes to support their schools. To compound these inequities, county levies were distributed to school districts on the basis of school district population, not on actual educational or financial needs (Erickson, 2006, p. 2).

In 1949, the School Foundation Program Law passed, which became the new basis for Montana school finance policy. The law was created in response to a report submitted to Governor Ford in 1946 that outlined 12 problems concerning education in Montana and focused on the general organization of education and finance. The Foundation Program (also known as the Public School Fund, 1963) attempted to address all of these problems between 1946 and 1971. The state took on more financial responsibility by "channeling state funds into those districts where local and country tax dollars were not adequate to meet minimal needs and standards" which is an example of the political dimension of place-consciousness (Malone et al., 1991, p. 361). The state equalization fund increased significantly, which was needed because "the total statewide ANB[15] count had doubled from 94,578 in FY[16] 1949 to 180,987 in FY 1967" due to the nationwide "baby boom" post-World War II (Merrill, 1992, p. 13).

Throughout the 1960s, Montana citizens and policymakers expressed frustration with the organization of the original state constitution. Supporters of a new constitution argued that companies such as the Montana Power Company and the Anaconda Company had benefited from unfair tax policies when the earlier constitution was written—that corporations and industries had dominated Montana politics at the expense of the people (Bowman, Hagener, Robinson, & Barrett, 2015). This relates to the sociological and political dimensions of place because there were power imbalances that impacted the

[15] ANB is an abbreviation for Average Number Belonging which equates to the number of students and per pupil expenditure.
[16] FY is an abbreviation for Fiscal Year.

culture of Montana, including marginalized groups such as women, children, Native Americans, and lower socioeconomic classes.

A referendum calling for a constitutional convention made it onto the state ballot. It was passed with 65% of voters approving the referendum in November 1970, and the revised Montana constitution was ratified in 1972 (Bowman et al., 2015). This was a pivotal point in Montana's history of school finance because the language focusing on education in the 1972 Constitution changed to the following:

> 1) It is the goal of the people to establish a system of education which will develop the full educational potential of each person. Equality of educational opportunity is guaranteed to each person of the state.
> 2) The state recognizes the distinct and cultural heritage of the American Indian and is committed in its educational goals to the preservation of their cultural integrity.
> 3) The legislature shall provide a basic system of free quality public elementary and secondary schools. The legislature may provide such other educational institutions, public libraries, and educational programs as it deems desirable. It shall fund and distribute in an equitable manner to the school districts the state's share of the cost of the basic elementary and secondary school system (Mont. Const. art. X, § 1, cl. 1-3).

Article X, Section 8 of the Montana Constitution also describes how responsibilities should be divided—specifically that local school boards and trustees have the responsibility of supervision and control of their district. The state legislature may distribute funds, but the local trustees decide exactly how that happens for their school system. This is very important in Montana, and it relates to the ideological dimension of place-consciousness because it shows how Montanans value local control, or at least the perception of local control, since education is a responsibility jointly shared by the state and local school boards. In Montana, local school boards exercise authority over their

district's curriculum and instruction—ensuring that curriculum aligns with accreditation standards mandated by ARM 10.55 and hiring highly qualified teachers to deliver the instruction. However, property-poor districts arguably exercise less control than wealthy districts since funding dictates access to the quality of choices, curricular materials, facilities, and even staff.

It is not surprising that Montana's education goals in 1972 included the values of equality, cultural integrity, and equity since the revisions were made after *Brown v. the Board of Education* (1954), the Civil Rights Act of 1964, and the Coleman Report (1966). These events focused on whether or not institutions, such as education, were providing equality of opportunity, so education systems across the country were being scrutinized (Merrill, 1992). In 1972, a legislative study found that local property taxes paid for 67% of education costs in Montana. Recommendations were urgently made to rectify the inequitable school finance system. During the 1973–1974 legislative sessions, all of the suggestions were ratified, which decreased the inequities among school systems. Nationwide, state and district courts became embroiled in this ideological and political fight for equity and adequacy, including 36 equity lawsuits[17] and 31 adequacy lawsuits[18] (Hanushek & Lindseth, 2009). Montana would face its own lawsuits starting in 1989.

[17] Sixteen of the equity lawsuits ruled in favor of the plaintiff, while 20 ruled in favor of the states (Hanushek & Lindseth, 2009, p. 92).
[18] Eleven of the adequacy lawsuits were dismissed on separation of powers grounds, 14 rulings favored the plaintiffs, and six rulings favored the defense (Hanushek & Lindseth, 2009, p. 107).

Montana School Finance: 1989–2017

Montana's equity lawsuit, *Helena Elementary No. 1 v. State* (1989) ruled in favor of the plaintiff. This was a pivotal event in Montana's history because the Montana legislature made several policy reforms as a result of the 1989 lawsuit. HB 28 increased the statewide levy as well as the state equalization aid. However, two more lawsuits were filed, which forced the legislature to change from the Foundation Program school funding formula to the current Base Amount for School Equity (BASE) system that funds school district general funds today. When the legislature created the BASE system in 1993 through HB 667, the pending lawsuits were dropped. This is an example of the political dimension of place where educators and administrators compromised in order to claim financial support for their schools.

Then, in late 1993, the legislature convened for a special session, and it passed HB 22, which decreased state funding for public schools by 4.5% (Erickson, 2006). During the late 1990s, Montana schools were struggling to recruit and retain teachers and administrators. While this is a historic issue in rural areas, it appeared to worsen in Montana at this time (Biddle & Azano, 2016; Nielson, 2001). In a follow-up study to the report, "Who Will Teach Montana's Children?" issued by the Montana Board of Public Education (2002), Nielson found that "high numbers of Montana teachers and new education graduates were being attracted to other states with higher salaries and benefits. Retirements had increased dramatically. And some subject area and administrative positions were extremely difficult to fill" (p.1). The report also identified trends between the geography of districts and the magnitude of the HQT shortage as well as the type of

shortage (i.e., specific content area, many job openings, inability to recruit and retain staff, severe shortages). Higher teacher salaries and better health benefits were the top two factors that survey participants reported would improve their chances of working in Montana. Without addressing these issues, Montana was going to face a statewide teacher shortage crisis (Nielson, 2001; Nielson, 2002).

State support for public schools steadily declined throughout the 1990s and was viewed by the Montana Quality Education Commission (MQEC) as unconstitutional because the state failed to provide adequate funding so that all students had access to a quality public education. In 2002, MQEC filed a lawsuit in collaboration with 11 school districts, advocacy groups, and citizens, against the state. The hearing began in January 2004 for *Columbia Falls v. the State*, and in April 2004, District Judge Sherlock ruled in favor of the plaintiffs, Columbia Falls et al. The Findings of Fact included a list of problems with HB 667 (the BASE system), a summary of challenges faced by public schools, and the state's lack of action on Article X, Section 1(2) of the Montana constitution recognizing and preserving the cultural heritage of American Indians[19]. While the judge "stated that it was not appropriate for the Court to tell the legislature how to design a school finance system," he did recommend a timeline for implementing a new funding system that included support for Article X, Section 1(2) and to define what a quality education system entailed in Montana (Erickson, 2006, p. 5).

Immediately, the state appealed to the Montana Supreme Court, which ruled in favor of the District Court decision. These District and Montana Supreme Court decisions

[19] Today the policy most often associated with Article X, Section 1(2) of the Montana Constitution is Indian Education for All (IEFA).

are pivotal events in the history of Montana's school finance because, together, they ignited legislative and policy changes that continue to influence school systems today. The courts' decisions also relate to political place-consciousness because the judges recognized the unique characteristics of Montana's rural and non-rural schools as well as the cultural heritage of the state. Judge Sherlock ruled in favor of groups who had been marginalized by the legislature—American Indians in particular—and he required the legislature to address their deficiencies.

The first task the 2005 legislature addressed was defining a "quality" system of education since that was ordered by the courts. SB 152 defines a quality education as:

- the educational program specified by the accreditation standards;
- educational programs to provide for students with special needs;
- educational programs to implement "Indian Education for All";
- qualified and effective teachers and administrators and qualified staff;
- facilities and distance learning technologies associated with meeting the accreditation standards;
- transportation of students;
- a procedure to assess and track student achievement; and
- preservation of local controls of schools in each district vested in a board of trustees. (as cited in Erickson, 2006, p. 7)

Once the legislature defined a quality education in SB 152, also known as MCA 20-9-309, they were ready to address school funding. This establishment of these accreditation standards is the third pivotal event in school finance history because it allowed the legislature to more authentically estimate costs associated with providing an education.

The Montana legislature approached this costing-out by creating a Joint Select Committee on Education Funding, which included members of the House and Senate, that worked with education stakeholders to identify key components of an adequate school budget. As the committee completed their research and began to compile

proposals, it became clear that more time and resources were needed to complete their tasks. Therefore, the Quality School Interim Committee (QSIC) was established through SB 525 to assess the needs of Montana students, to determine "the costs of a basic system of free quality public and elementary schools," to determine the state's responsibility, and to create a fair, reasonable, and equitable funding formula (Erickson, 2006, p. 9).

The QSIC collaborated from May to December 2005, and it hired outside consultant R.C. Wood to design a study, collect data, and evaluate data assessing the needs of Montana's school districts[20]. The survey had an 83% response rate. Several findings stood out to the QSIC: with the proper distribution of funding, school districts would hire more certified personnel and meet the accreditation standards; the achievement gap most impacted Native American students and the schools that served them; IEFA received insufficient support and funding to be effective; to retain quality educators, schools wanted help building positive school climates and professional development as well as competitive salaries and benefits; districts wanted more infrastructure to support technology; and finally, districts asked for funding to train educators to effectively use the data from state assessments (Erickson, 2006).

Now that the QSIC knew what the needs of their school districts were, and it had an expectation of what constitutes a quality elementary or secondary education according to SB 152, it was time to put a cost on everything. R.C. Wood applied four different models to measure financial adequacy in Montana: the successful schools' approach, the professional development approach, the evidence-based approach, and the advanced

[20] All school districts in the state were invited to participate. All school types (K–6, 6–8, 9–12, K–8, K–12) and regions ended up being represented, which increases the reliability and validity of the survey.

statistical analysis approach (Odden & Picus, 2014). The successful schools approach found that the state needed to increase expenditures by about $96 million; the professional judgement approach claimed the increased costs were $329 million; the evidence-based approach, which also included two pilot programs, expected an increased cost of $32.2 million; and finally, the advanced statistical analysis recommended an increase of $34 million (Erickson, 2006). Illinois, Maryland, Ohio, and Washington applied the successful schools approach. Kansas, Kentucky, Massachusetts, New York, and South Carolina conducted studies using the professional judgement approach. North Dakota, Wisconsin, and Wyoming currently utilize the evidence-based model when determining their school funding. No state currently utilizes the advanced statistical analysis approach (Odden & Picus, 2014). In addition to the needs assessment and the four adequacy studies, the QSIC also requested an economic analysis of teacher recruitment, retention, and salaries.

Stoddard and Young (2005) found that between 1988 and 2000, Montana teacher salaries fell from 85% of the national average to 76%. In 2004, about 40% of recent graduates went to teach in other states, which was attributed to declining student enrollment and declining salaries, relative to similar professions. Isolated schools had (and still have) the most substantial recruitment and retention problems. Stoddard and Young asked, “How much would an increase in salaries affect recruitment and retentions?” They found that a 10% salary increase in their district (not all districts) “would reduce turnover by about 20%, difficulty in hiring by about 10%, and misassigned teachers by about 30%” (Erickson, 2006, p. 18).

After all studies were complete, the QSIC recommended to the Joint Select Committee that there should be nine components in the new school funding formula, which focused on students, staff, operations, and facilities. To help with this process, OPI established size categories for elementary and secondary schools as well as some student identifications ("at-risk," gifted, special education, etc.), that made the per-student and classroom costs more equitable. This is another example of the political dimension of place.

The costs associated with education are so complex that at the end of their scheduled work time, the QSIC determined that their proposal changes were not ready. In December 2005, these policies went into effect:

- the American Indian Achievement Gap payment defined as "a payment for each American Indian student enrolled in the district on the fall enrollment count date"[21];
- the Quality Educator payment defined as "a payment for each full-time equivalent licensed educator and for other license professionals employed by the school district"[22];
- the At-Risk Student payment defined as "based on Title I distribution amount"[23];
- and the IEFA payment defined as "a payment to assist with the implementation of the provisions of the Montana Constitution (Article X, section 1(2)) and the statutory requirements for the recognition of American Indian cultural heritage (20-1-501, MCA)."[24]

The four components were all recommended by QSIC, as well as $23 million in maintenance needs and $2.5 million for a statewide facility condition inventory. QSIC issued a final report in October of 2006. The next special education committee, the SFIC,

[21] The American Indian Achievement Gap can be found in 20-9-306(11) and 20-9-330, MCA.
[22] The Quality Educator Payment can be found in 20-9-306(16), 20-9-326, and 20-9-327, MCA.
[23] The At-Risk Student component can be found in 20-9-306(12) and 20-9-328, MCA.
[24] The IEFA component can be found in 20-9-306(14) and 20-9329, MCA.

did not meet until 2015. Between 2005 and 2015, several significant events influenced the work of the SFIC starting with *Columbia Falls v. State* (2008).

Columbia Falls v. State (2008): The Progress of the State

The plaintiffs from *Columbia Falls* (2004/2005) sued the state again because they were failing to see change. In *Columbia Falls v. State* (2008), Judge Sherlock ruled in favor of the state writing that Montana was making progress. However, in his discussion, Sherlock wrote that the state needed to maintain or increase its share of state aid. Funding also needs to keep up with the costs of special education and teacher salaries. Finally, he reiterated the complexity of Montana's education system due to its geography, which relates to all dimensions of place-consciousness.

The *Columbia Falls* (2008) decision steered the direction of legislation from 2009 to today. Post–*Columbia Falls*, significant legislation included the 2009 creation of the Digital Academy[25] via funding in HB 2 and described in Section 20-7-1201, MCA; the 2011 MQEC lawsuit and negotiations; and multiple bills that increased BASE funding and adjusted for inflation. Bills were also introduced to address recruitment and retention, an issue that the 2015–2016 SFIC would address as well. For example, as a result of the SFIC, in 2017, HB 119 revised the quality educator loan assistance program to better ensure money was going to the schools impacted by recruitment problems. SB 115 also revised an old program to encourage National Board certification. Instead of a one-time

[25] Formerly known as the Virtual Academy.

payment, the new program provides ongoing stipends, which rewards high-quality teachers.

The SFIC also made recommendations to increase equity across the state. Perhaps most significant was the elimination of block grants and the natural resource development payment in 2018, which was an attempt to equalize the state's guaranteed tax base aid. "As state funding that previously went to districts as block grants is redistributed by increasing the GTB multiplier over the new few years, GTB aid will increase and local property taxes (BASE mills) will generally decrease," unless you are a wealthy district—in that case, you will pay more in BASE taxes (Montana Legislative Fiscal Division, 2018). Montana's school finance policies are increasingly complex as the government works to provide equitable and adequate funding so that all students have an equal opportunity to access a quality education.

Chapter Summary

This literature review provided a summary of critical place-conscious theory, provided a historical overview of school funding in Montana, recognized both the strengths and challenges of rural communities, and identified characteristics of teachers who work in rural schools. Montana's experience shows that many of the education challenges in the state are not technically educational issues or "rural problems"; they are economic, political, and systemic. In addition to legislative policies, stakeholders such as the OPI and the MUS are implementing programs and incentives to strengthen the teacher profession and make the distribution of HQTs more equitable across the state.

However, “the real challenge is to sustain such supports over time…that creating a stronger and more attractive teaching profession will depend on effective advocacy” (Berry & Shields, 2017, p. 15). Advocacy groups under RISE4Montana, the Montana Public Education Center, and the School Administrators of Montana (SAM) represent the needs of Montana’s pre-service teachers, practicing teachers, principals, and Montana’s school communities. This dissertation provides another opportunity for K–12 teachers in rural communities to share their experiences. The Montana constitution sets the expectation that providing an equal opportunity to quality education for all students, regardless of their backgrounds, needs to remain at the heart of policy and practice. Policymakers and education stakeholders must recognize the importance of place-consciousness (Gruenewald, 2003a, 2003b) to build lasting relationships and effective practices (Biddle & Azano, 2016; Darling-Hammond, 2019; Schafft, 2010; Showalter et al., 2019). This is essential to recruiting and retaining teachers in rural communities as well.

CHAPTER THREE

METHODOLOGY

Introduction

This dissertation examines the discourses of K–12 education policy in Montana, explores historic trends and changes through these discourses, and investigates how discourses (legislation, studies, reports, etc.) affected K–12 teacher recruitment and retention practices. The theoretical framework of critical place-consciousness (Gruenewald, 2003a, 2003b) was applied to the semi-structured interviews while also using CPDA (Fairclough & Fairclough, 2012; Taylor, 2004) as the methodology for the qualitative data. This chapter describes the methodology of the dissertation including a review of the research questions and sampling specifications.

Researcher Positionality

Before moving to Montana, I taught in Colorado at a public, rural middle school for five years, and at a charter, urban middle school for a year, both in underserved districts, working to close students' opportunity and achievement gaps. These experiences taught me about the importance of getting to know my students and the larger community where I teach. As a former K–12 teacher, I also recognize the great responsibility that educators have and the potential to truly change lives. While there were several times throughout my initial six years that I was completely burnt out because of personal struggles with managing my learning environment and my teaching

workload, those early years of teaching were transformative for me. The students taught me more about myself than I taught them about social studies content. I reflect on those years with humility, gratitude, and sometimes even guilt, that I should have done better for those students, while also recognizing I taught to the best of my ability at the time.

When I moved to Montana, I taught for three years at a public, affluent, middle school located in an urban cluster, but otherwise, remote town (McCracken, 2016). My experiences at this school were very positive, but when I attended conferences and academic competitions across the state, I was sometimes met with animosity when I shared where I taught. It seemed that many schools did not have the same quality of resources and support that my district provided, so there was some resentment. I began to question the equality of educational opportunities for teachers and students across the state, just as I had in Colorado.

I recognize that my background causes me to favor the positions of teachers and students as opposed to administrators or taxpayers. I also need to be aware of my role as someone who is not considered an insider or member of the places that I am studying. I need to practice respect, responsibility, and reciprocity (Anderson & Lonsdale, 2014). Since I did not grow up in Montana, I try to connect with participants and education stakeholders through the stories of my extended family whom live throughout Montana. For example, my mom grew up in in the rural Montana town, Broadus, my aunt and uncle own and operate a ranch in Ashland, Montana, my mother-in-law's family is established in Havre, and my husband grew up in Great Falls, but he spent a lot of time in the more remote towns of Choteau and Augusta, on the Rocky Mountain front.

I also recognize the differences in political values between Colorado and Montana. In Colorado, the state exercised more control in regard to curriculum standards and assessment. Colorado's political climate allowed for more state intervention, and in my six years in Montana, I have experienced a political climate that favors local control. For example, state standards for content programs were revised between 2019-2020, and during this process the OPI had to complete an economic impact study to ensure that local school districts could afford to implement the new standards, whether or not they would need to buy new curricular resources, etc. While this makes sense, I also wonder, will the state provide additional funds, so that school districts can purchase new materials, if needed? Would a district's ability to afford materials trump best practices, if the economic impact was deemed "too great"? I recognize my own preference for more state accountability and leadership. This is important to identify because my values may conflict at times with critical place-consciousness theory, which is central to my study.

Research Questions

The research questions for this multisite case study are listed below:

RQ 1. Is the State fulfilling its responsibility to provide equality of educational opportunity to students in rural schools through supporting teacher recruitment and retention?

RQ 2. What have been the outcomes, in terms of adequate support (funding, curricula, and accreditation) for teacher recruitment and retention in sample Montana rural school districts since the initial *Columbia Falls v. State of Montana* (2004/2005) decision?

A. How has state policy affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?

B. How has local policy, as perceived by practicing K–12 teachers, affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?

Research Design

I used a qualitative multiphase participatory research design that integrated a multisite case study and CPDA (Creswell, 2013; Creswell & Creswell, 2018; Yin, 2018). Collection of qualitative data allowed development of an in-depth understanding of the research problems by exploring, utilizing, and comparing the results from multiple sources of data (Creswell & Creswell, 2018). A strength of the qualitative design is that each phase or component of data has the potential to inform decision-making in the other phases. For example, the semi-structured interview phases of the study provided an understanding of the unique values and culture of the rural communities, which would not have been possible if the study was purely focused on education policy texts. In addition, a participatory orientation (Mertens, 2003) was applied, meaning that teacher insights during interviews influenced some of the policies that were analyzed and the questions that were asked in the second interview. In this way, the participants were both being studied and helping to guide the study, which aligns with critical place-consciousness. A participatory orientation can be applied to the CPDA as well, where the court and policy documents provide data and also steer the study.

A case study is defined as research that "investigates a contemporary phenomenon in depth and within its real world context, especially when the boundaries between phenomenon and the context may not be clearly evident" (Yin, 2018, p. 15). My

data are bound by time (2004-2019), place (Montana), and context (rural schools that OPI identifies as impacted by the critical quality educator shortage). This exploratory multisite case study focused on the history of school finance in Montana K–12 schools with a focus on equity, adequacy, and whether or not the state is truly providing equality of educational opportunity, which includes recruiting and retaining teachers. A variety of sources provided data for each participant and school district site, including two interviews, field notes with memos, and participant questionnaire. The units of analysis included the individual teachers and state policy texts [court documents, legislative documents, the Montana Administrative Rules (ARM), the Montana Code Annotated (MCA), etc.].

Rationale

The research questions focus on the phenomena of K–12 teacher recruitment and retention in rural schools impacted by the critical quality teacher shortage in Montana. Question one bounds the study by time, 2004–2019, using the District Court case, *Columbia Falls v. State* (2004) to initiate this case study. Otherwise, the history of providing an adequate education could be chronicled back to Montana's founding in 1889. RQ1 is answered using CPDA and the teacher interviews. RQ2 and the supporting questions, A–B, provide a rich description of how policy is implemented in practice. I hoped to analyze local school board packets and minutes; however, after a review of eight school districts that were initially considered for this study, it became clear that school board information was not consistently updated or made available to the public

unless there was a request. I wanted to only analyze publicly available discourses so that there was no risk of compromising the anonymity of interview participants. Therefore, question RQ 2B is answered through the participant interviews, which provide a thorough description, but is also limited to the personal experiences of teachers at their school district (Creswell & Creswell, 2018).

Ethical Considerations

One challenge of this multisite case study was being sensitive to the vulnerability of the people and places involved in the study. Teachers need the support of their administrators to keep their jobs and to grow professionally. Administrators and school districts need the financial and political support of the public, and the public tends to support schools they feel are performing well. All participants had the choice to conduct their semi-structured interviews face-to-face, by telephone, or by webcam. An advantage of this type of data collection was that participants had the opportunity to provide historic information and context. However, my presence and role, especially as an outsider of the community, may have prejudiced the responses of the interviewees.

Since this research involved schools, the safety of students was of upmost importance. All protocols outlined in the Family Educational Rights and Privacy Act and district policies protecting students' privacy were followed. A challenge of the qualitative aspect of the study was working with small populations, where individuals may be easily identifiable in interviews. I was also sensitive to the socio-political-cultural context of the communities I worked in. For example, school districts rely heavily on the financial

support of their community through bonds and mills, so I respected that district leaders would want to protect the image of their schools. My participants take pride in their work, so I honored that as I explored the recruitment and retention of HQTs. I also protected the identity of my participants, so that what they shared does not impact their jobs. All participants were assigned a gender-neutral pseudonym, personally identifiable traits were removed, and participants had an opportunity to review Chapter Four to ensure they felt protected and that my interpretations accurately represented their experiences.

Data Collection and Analysis Procedure

Throughout the multisite case study, data were organized geographically, chronologically, and categorically. Figure 2 summarizes the data collection process which is organized into five phases involving both semi- structured interviews and CPDA.

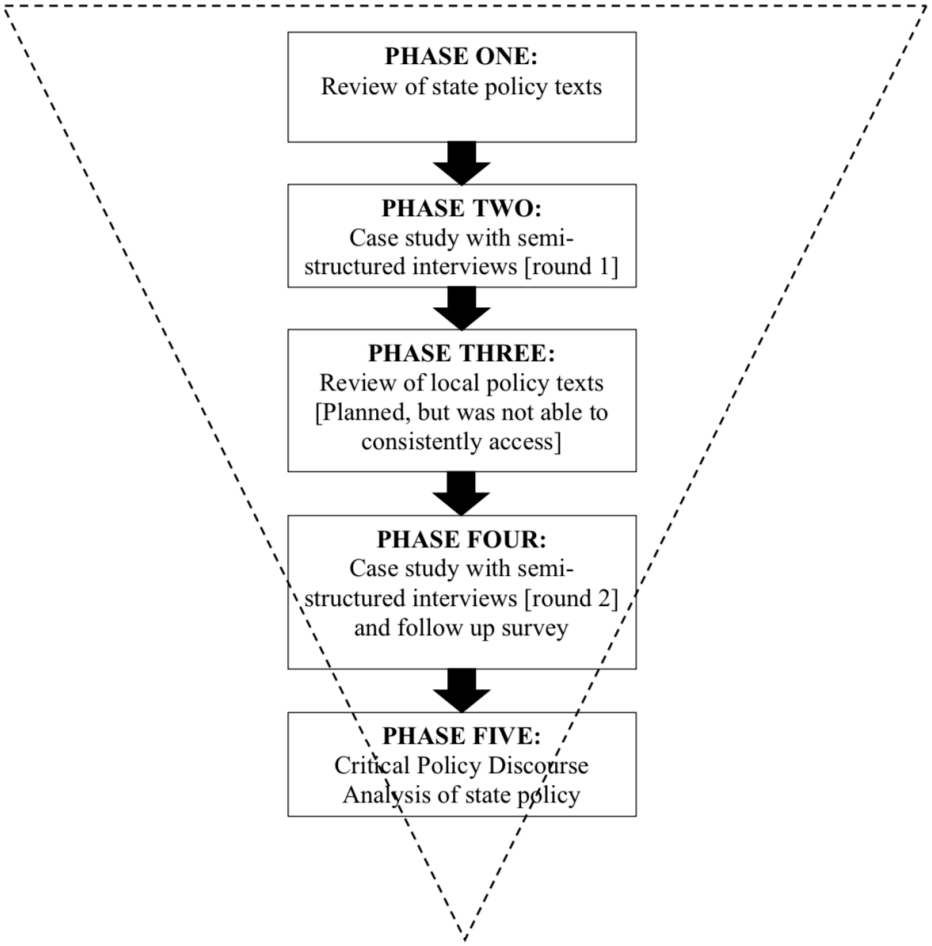


Figure 2. Multiphase participatory design: A multisite case study and critical policy discourse analysis

The case study consisted of five interconnected phases: (1) a review of state policy texts related to teacher recruitment and retention as well as accreditation; (2) introductory interviews with rural teachers in two school districts to establish the structure for the policy analysis; (3) brief review of educational policy texts (to inform second interviews) that included an attempt to publicly access local policies; (4) in-depth interviews in two districts, including a discussion of policy, and a post-interview survey; and (5) critical policy discourse analysis of state educational policy texts. The in-depth interviews (phase

four) involved the same teachers from phase two. The interviews with participants were needed to conceptualize why educators teach in that district, how teachers are supported in their district, how teachers view/provide a quality education, and why teachers stay or leave. The interviews were also needed to better understand the culture of the school and the larger community as well as the effectiveness of public policy. The introductory interviews (phase two) influenced the documents included in the discourse analysis or the coding that occurred during the discourse analysis (phases three and five). Phase five of the qualitative research utilized critical policy discourse analysis (Fairclough & Fairclough, 2012; Taylor, 2004). The policy texts that were screened for the CPDA are included in Appendix B.

The CPDA explored legal, organizational, and policy discourses provided by the Montana's judicial system, Montana's legislature, the OPI, education advocacy groups, and other stakeholders in K–12 education between 2004 and 2019. In turn, the emerging themes from phase three influenced the interview questions that were asked during the in-depth semi-structured interviews in phase four, and phase four influenced phase five. Again, this participatory aspect aligns with the critical place-conscious theory since it values the experiences and opinions of study participants, and it recognizes that their voices are necessary in order to holistically understand the phenomena being studied. A challenge of this design is focusing on the most appropriate qualitative findings in phases one and two, which inform phases three through five.

Interview data were collected over six months, with the majority of data collection occurring over the initial four months. The semi-structured interview questions

are in Appendix C. A first semi-structured interview with the teacher, in her school or town, began the data collection process while a second semi-structured interview with the teacher occurred over the phone, and finally, a follow-up questionnaire was sent via email (Appendix D). I transcribed two of the interviews myself, while the remaining interviews were transcribed using an online transcription service that I paid for, then individually reviewed for accuracy and cleaning, which included removing and replacing personally identifiable information such as names or places with assigned pseudonyms[26]. All interviews were shared via email with the participants, and participants were given the opportunity to comment or elaborate, although it was not required.

Interview data were coded using the software program NVivo for support to efficiently organize and retrieve codes used to synthesize categories and themes. I used the query feature as well as my own observations, to note re-occurring words and phrases to develop an emerging codebook (Appendix E). I also added terms to the codebook from the academic literature and policy discourse surrounding recruitment and retention of K–12 teachers, such as community, curriculum, place-based, professional capacity building, sustainable, values (adequacy, equality of opportunity, equity, quality, etc.).

References to interview data were coded by participant, collection process of data, and the interview time. Participants are identified by a pseudonym, so their initial will be used (M = Mac; J = Jean; P = Pat; S = Sam; E = Erin; A = Alex; C = Charlie) followed

[26] While all pseudonyms are gender neutral on purpose, I am using female pronouns to describe all the participants through the narrative for clarity. I chose female pronouns since K–12 education remains a female-dominated profession.

by the form of data (R1 or R2 = round[27] one interview or round two interview). The number at the end of the coding reference for interviews is the time (hour:minutes:seconds) in the interview that was transcribed and uploaded to NVivo. For example, M.R1.01:16:23 comes from Mac's first round of interviews and the reference can be found in the first hour, 16 minutes, and 23 seconds. Finally, references to policy discourse data will be cited according to APA guidelines since they are all published, publicly available documents.

Figure 3 describes the data analysis processes that were utilized from the beginning of the data collection for both the interviews and the CPDA.

Data Source	**Coding and/or Analysis**
Interviews (round one)	Memo writing; First cycle initial coding and attribute coding
Public policy texts	Memo writing
Interviews (round two)	Memo writing; First cycle initial coding and simultaneous coding (Saldaña, 2016)
Public policy texts	First cycle initial coding; In Vivo coding (Saldaña, 2016)
Interviews (all) and public policy texts	Second cycle focused values coding
Public policy texts	Critical policy discourse analysis, focusing on argument reconstruction and interdiscursive analysis (Fairclough & Fairclough, 2012)
Interviews (all) and public policy texts	Post-coding and pre-writing transition, including the "trinity" of themes (micro, meso, and macro) and a "top 10 list" of interview quotes relating to categories and themes (Saldaña, 2016)

Figure 3. Data analysis processes

[27] I use this term because several teacher interviews lasted over multiple days even though the same foundational questions were asked to all teachers. It took several interview sessions to get through the questions that I asked the other teachers in one interview.

As interviews were conducted during the Spring of 2019, I applied first cycle initial coding to develop emergent themes and the codebook. I focused on (1) dimensions of critical place-based theory, (2) attributes of school and town communities, (3) teachers' personal education backgrounds and experiences, (4) teachers' professional experiences with recruitment, professional development, and retention (including policies), and (5) teachers' definitions of a quality education. During the analysis, I also applied attribute coding (Saldaña, 2016, p. 82–83). Attribute coding is often used in case study research where there are a variety of data sources including, but not limited to, interviews with multiple participants, observations, and discourses (Saldaña, 2016).

After the first round of interviews, I reviewed the policy texts, and completed memo writing. Then I conducted the second round of interviews, which also included memo writing, as well as first cycle initial coding and simultaneous coding which is described as "the application of two or more codes" (Saldaña, 2016, p. 297). This form of simultaneous coding was implemented to start analyzing place-consciousness, teachers practical experiences, and political values.

In September 2019, I completed first cycle initial coding of all interviews and policy documents (Saldaña, 2016). I used in vivo codes, how the document is using those terms verbatim. For example, highly-qualified teachers and equality of opportunity, were phrases that were consistently identified in policy. The goal was to develop a sense of the landscape of the data and to develop the tools for more focused coding. In October, I began second cycle focused coding of all interviews and policy texts, where I reviewed the codebook to select codes that relate directly to place-consciousness and the ways that

place influences attributes, experiences, and policy. I looked at place [perceptual, political, and sociological dimensions] and attributes first. I physically cut out the sections of the participant's interviews that related to identified categories to synthesize themes.

Then I completed second cycle focused values coding, where I analyzed the interviews for either direct references or inferences relating to U.S. cultural and political values: adequacy, economic efficiency, economic growth, equality of opportunity, equity, fraternity, individualism, liberty, order, power, responsibility, and quality education. These values related to political culture (Fowler, 1995, 2013) as well as education finance (Odden & Picus, 2014) and core terms from the court documents.

In October 2019, I began CPDA of policy texts, specifically the District and Supreme Court documents. In total sixteen policy texts relating to K–12 education decisions made at the state level in Montana were identified for the policy discourse analysis. These 16 policy texts are bound by time, from 2004 to 2019 when the Montana legislative session ended. The policy discourses include sections of the ARM including K–12 education accreditation standards, court cases, legislative summaries relating to education, legislative reports, sections of the Montana Code Annotated (MCA), and sections of the Montana constitution. The discourses were chosen because they all directly relate to school funding in Montana's K–12 education system. Legislative experts were consulted to confirm that the 16 documents were the most relevant and that the data were sufficient. All discourses were uploaded to the software program, NVivo, where I utilized the query feature to check my coding. For example, during values

coding, after my review of the discourses, I checked the query results for that value to ensure I did not miss anything of significance.

Throughout November and December, I continued focused values coding and synthesizing connections with critical place-consciousness for all interviews and policy texts. I also completed post-coding and pre-writing transition activities, including creating a graphic organizer representing the "trinity" of themes (micro, meso, and macro) and a "top 10 list" of interview quotes relating to categories and themes (Saldaña, 2016). During the Spring and Summer of 2020, I went back a final time to review the values coding I completed of the policy texts. Then I completed the CPDA of text excerpts using the process of argument reconstruction and interdiscursive analysis (Fairclough & Fairclough, 2012). This process is described in detail below, in a section focusing on the Critical Policy Discourse Analysis Framework.

Data Trustworthiness

During the qualitative analysis, I used multiple strategies to ensure trustworthiness, including triangulation and member checking. Triangulation is the process of using a sufficient variety of data sources, such as multiple interviews, observations, documents, and sites to confirm findings (Creswell & Creswell, 2018, p. 200). Member checking is the process of sharing a version of the report (not the raw data) with the participants so that they have an opportunity to comment on the findings and their accuracy. Lincoln and Guba (1985) consider member checking to be "the most critical technique for establishing credibility" (p. 314 as cited in Creswell, 2013, p. 252).

I emailed transcriptions of interviews to all participants, and I gave them an opportunity to clarify any ideas. I also emailed a follow-up questionnaire to ensure that I documented teacher experiences and perceptions toward policies accurately. Finally, I emailed a draft of Chapter Four, asking participants to confirm that they received the email. Five out of seven of the participants reviewed the draft to ensure they felt their identity was protected, and that their views were properly interpreted. Two emailed that they did not have time to review the draft at the time, but that they received it.

Whittemore, Chase, and Mandle (2001) describe authenticity as making sure different voices are heard. In this study, I included teachers' perspectives and experiences, as well as documents from different political administrations, to reflect varying perspectives and the evolution of how Montana conceptualizes quality education. I also included two different school sites in the case study to show the similarities and differences regarding teacher recruitment and retention across Montana.

Another method for ensuring credibility is inter-coder agreement, which I used during first cycle of coding when a peer independently coded two of the interviews from this study (Creswell & Creswell, 2018). Our coding consistency was approximately 90%, which I calculated by comparing her codes with my codes. A good measure of qualitative credibility is when "the consistency of coding be in agreement at least 80% of the time" (Miles & Huberman, 1994, as cited in Creswell & Creswell, 2018, p. 202).

Critical Policy Discourse Analysis Framework

CPDA examines the relationship between policy and cultural, economic, historical, and political contexts. Language represents the world, and CPDA evaluates how identities, societies, and texts are ideologically influenced by power (Fairclough & Fairclough, 2012; Taylor, 2004). The CPDA included extracts from education policy texts associated with the foundation of Montana's modern public K–12 education goals and responsibilities. The CPDA started with the revised Montana constitution (1972), which is included in Chapter Three to provide background for the education policy texts but is technically outside the timeframe of the case study, 2004–2019. As described in Chapter Four, analysis of policy texts bound by the case study occurred in conjunction with the school site interviews. The CPDA began with *Columbia Falls v. State* (2004/2005) and *Columbia Falls v. State* (2008), then focused on the state legislative reforms initiated by the court cases, including, but not limited to, Sections 20-7-101 and 20-9-309 of the Montana Code Annotated (MCA, 2019), and Chapter 55 of the Administrative Rules of Montana (ARM, 2020).

Data synthesis from the policy texts included a description of the written source; an argument reconstruction (practical claims, goal premises, value premises, and means-goal premises) and an interdiscursive analysis using excerpts of the text. The definitions for the various CPDA premises are as follows (Fairclough & Fairclough, 2012, p. 11).

Claim "the conclusion of practical argument…judgement about what we should do, what it would be good to do, or what the right course of action is…the conclusion is arrived at on the basis of four

	premises"
Circumstantial	"represents the existing state of affairs and the problems it poses"
Goals	"describes (and 'imagines') the future state of affairs agents want to bring about or think ought to be brought about"
Values	"expressing the values and concerns which underlie the agents' goals (but also affects how they represent the context of action)"
Means-goal	"represents the proposed line of action as a (hypothetical) means that will presumably take agents from the current state of affairs to the future state of affairs that is their goal"

As I engaged in CPDA, I first reviewed the entire policy discourse then I selected text excerpts that were most relevant to the phenomena being studied. It was within those excerpts that I analyzed the premises listed above, while also paying attention to the audience of the text, sentence structure and type, and tone. Next I applied interdiscursive analysis which "focuses on identifying which genres and discourses are drawn on in the text, and analyzing how they are worked together in the text" (Taylor, 2004, p. 437). Genres are defined as "ways of interacting" for example, adjudication is a genre, related to judges or courts deciding a legal action (Taylor, 2004, p. 437). The interdiscursive analysis included exploration of themes and vocabulary as well as the larger social context.

While I wrote memos on the texts directly, I also outlined the CPDA in a document and included a general description of each policy document. The graphic organizer below is designed by Fairclough & Fairclough (2012. Figure 4 will be utilized

to analyze policy texts in Chapters Three and Four, to show the relationships between the elements of the practical argument. An example is below.

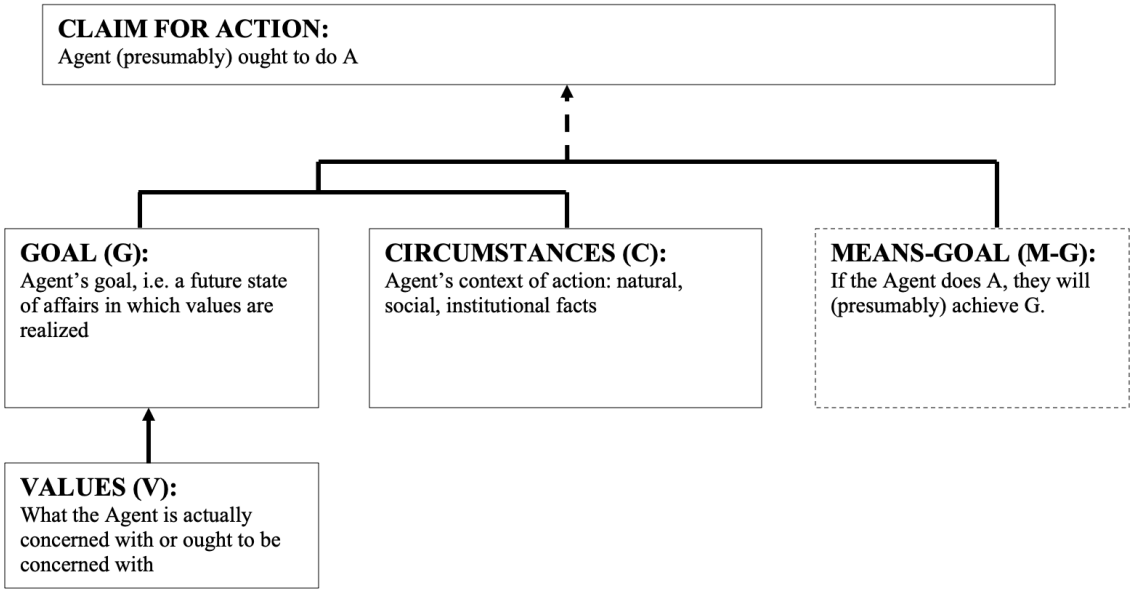


Figure 4. Fairclough & Fairclough's (2012) proposal for the structure of practical arguments (p. 45)

Fairclough and Fairclough (2012) write that political discourse is primarily practical argumentation where "politics is most fundamentally about making choices about how to act in response to circumstances and events in light of certain goals and values, and such choices and actions which follow from them are based upon practical reasoning about what should be done" (p. 11). Below is an analysis of the 1972 Montana Constitution, which is foundational to this study and will provide an example of the CPDA process.

The Montana Constitution (1972) Article X, Section 1

This document is directed at the wider public as well as government officials, including both legislators and judges. The text genre is policy since it is an excerpt from a

state constitution. The text is publicly available on Montana's government website, and it is updated every other year since the state legislature meets biennially. Article X, Education and Public Lands, Section 1, Educational goals and duties, of the Constitution is located between Article IX. Environment and Natural Resources and Article XI. Local Government. This seems appropriate since funding for public schools partially comes from natural resources, and budgeting of public school district funds is determined largely by local school boards.

Argument Reconstruction

The discourse is generally structured in a way that begins with goals, includes values, and ends with means-goal (Fairclough & Fairclough, 2012). The text has the following elements:

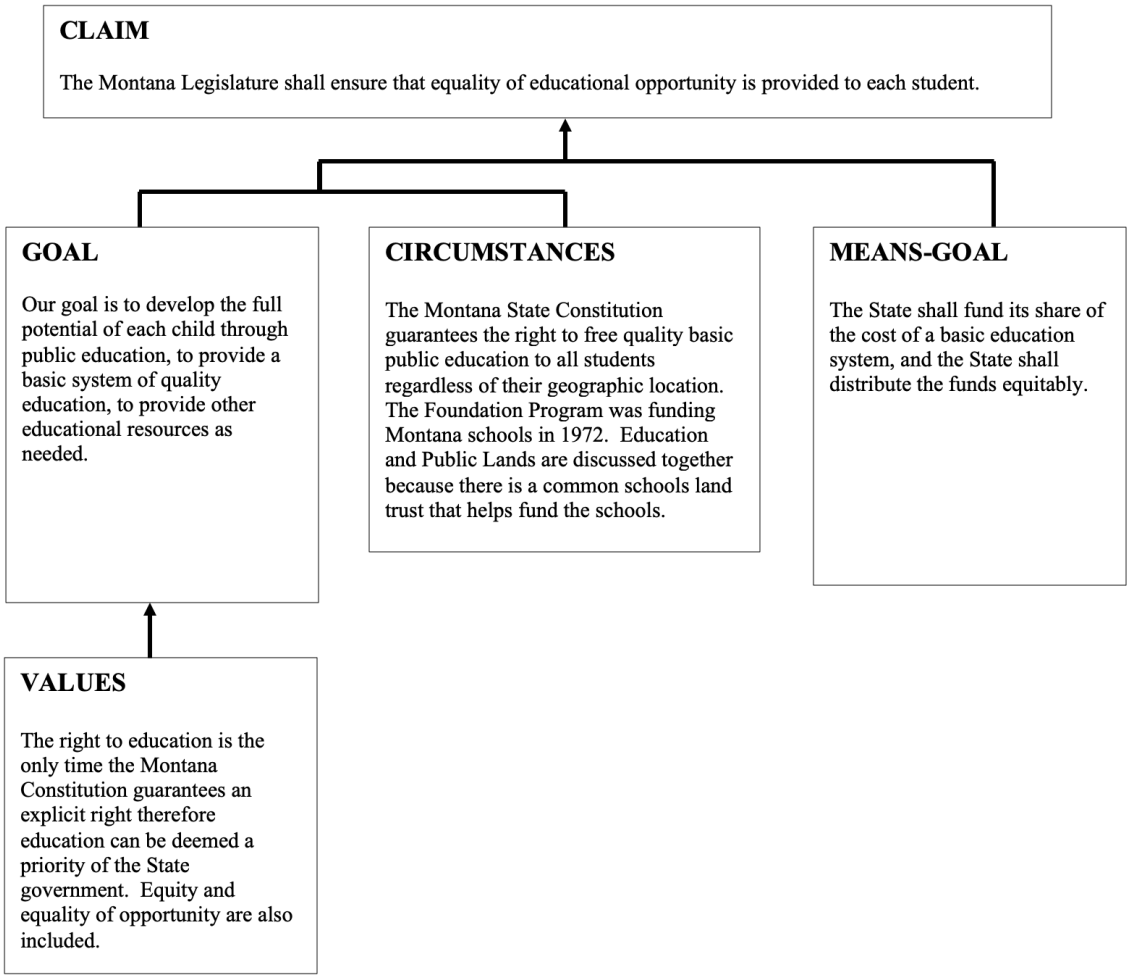


Figure 5. Argument reconstruction, the Montana Constitution

There is a sense of commitment, especially for Goal 1, through the phrase "full educational potential of each person" (Mont. Const. art. X, § 1). "Potential" is also hopeful, but how is potential being determined? A teacher, a parent, and a legislator may have very different views about the potential of a student, and what supports are necessary for that student to fulfill their potential. "Guaranteed" is a strong word choice and communicates a sense of urgency. Who is guaranteeing this opportunity? How is it guaranteed? This commitment, although vague, could be a response to the frustration

some Montana citizens felt prior to the 1972 Constitutional Convention; Montanans had been calling for constitutional reform to establish a more effective state government since the end of World War II (Roeder, 1990). While there was little text related to the circumstantial premises, it is notable that this is the revised state constitution, adopted in 1972. This section focusing on education is grouped with public lands, which was done purposefully when Montana was granted statehood in 1889 since "a portion of the land was given to the state expressly for the purpose of funding what were known then as 'common schools.' Montana's 'common school trust lands' continue to generate revenue supporting public education" (SFIC, 2016, p. 6).

The structure of the text includes both present and future tenses. For example, Goal 1 states that "it is the goal of the people to establish a system of education…" while Goal 3 states, "The legislature shall provide a basic system of free quality public elementary and secondary schools…" (Mont. Const. art. X, § 1). Concerning sentence structure, Goal 1 includes declarative sentences, while Goal 3 includes imperative sentences. This is evident through the word choices "shall" and "may."

Interdiscursive Analysis

Educational goals and responsibilities are the major themes of the constitutional extract. The text of Article 10, Section 1 is below.

Section 1. Educational goals and duties. (1) It is the goal of the people to establish a system of education which will develop the full educational potential of each person. Equality of educational opportunity is guaranteed to each person of the state.
(2) The state recognizes the distinct and unique cultural heritage of the American Indians and is committed in its educational goals to the preservation of their cultural integrity.
(3) The legislature shall provide a basic system of free quality public elementary

and secondary schools. The legislature may provide such other educational institutions, public libraries, and educational programs as it deems desirable. It shall fund and distribute in an equitable manner to the school districts the state's share of the cost of the basic elementary and secondary school system.

The discourse states in line one that it "is the goal of the people," which we can assume to be the people of Montana (Mont. Const. art. X, § 1.). Lines two and three then specify that the goals include establishing a system that develops the full educational potential of each person. Lines three and four describe the goal of equality of educational opportunity, which is associated with the value of equity. This opportunity is guaranteed, again, to each person. What does equality of educational opportunity look like in reality—the opportunity for what?

Lines five through seven describe the goal of educating all Montana students about Indigenous peoples and their cultures. Today, this is recognized through legislation, as IEFA. This goal of the constitution will not be analyzed in detail since it does not directly relate to the phenomena of teacher recruitment and retention. However, it is worth noting that line six mentions the state's commitment to this goal, which was written in 1972, yet the goals for implementing the goal, now referred to as Indian Education for All (IEFA), were not established until 2000 when the legislature passed HB 528, also recognized as 20-1-501, MCA, and the Montana Board of Public Education put procedures in place (Juneau, 2013).

Lines eight through 12 summarize how the state legislature will establish its system of education. Line eight uses the phrase "a basic system of free quality" to describe the school system. Basic and quality are usually opposites, so why did the legislature choose these words? Perhaps the term "basic" allows the state to only fund the

minimum expectation or resources. This will be discussed in greater detail during the CPDA of the *Columbia Falls* cases in Chapter Four.

Lines nine and 10 are interesting because the constitution articulates it is the legislature's responsibility to provide a quality education, but then it provides the option to fund libraries or other educational programs "… as it deems desirable." Finally, lines 11 and 12 discuss the state's responsibility to fund and distribute resources in an equitable manner the state's share of the cost of public education. Who determines what the state's share should be versus what it actually is? Needs versus wants? Again, the adjective "equitable" is extremely important as court cases across the United States focus on whether state education funding is equitable and adequate. Equity is also central to recruitment and retention: If teachers are not paid in an equitable way to their peers in neighboring districts, is the state fulfilling its duty? If teachers are not treated in an equitable way, is the quality of instruction equitable across schools? Notably, the subject of funding is school districts, not the general education system. This implies that Montana may have recognized the uniqueness of local schools, that rural places matter, and the schools are often the center of their community (Showalter et al., 2019). Local school districts controlling how funds are used in their community also aligns with the political dimension of place (Gruenewald, 2003a).

Participants and School Site Context

From the 2018 Critical Quality Educator Shortages report published by the OPI, I narrowed the original field to eight rural school districts from Montana. The school

district superintendents were emailed to obtain permission to interview teachers at their schools. Only three responded affirmatively to participate in this study, and of the three, two districts were chosen: one high school district and one K–12 district. They were purposefully chosen to highlight the differences, although they are bound by a common problem of struggling to recruit and retain HQTs in a rural community (OPI, 2019). While both school sites are in rural communities, their primary economic industries are different, therefore their socioeconomic demographics vary, and Glacier's economy was identified as declining while Yellowstone's economy was described as growing. More demographic information is provided below in Table 1.

Three teachers from the high school district, identified as Glacier[28], volunteered to participate, while four teachers from the K–12 district, identified as Yellowstone, volunteered to participate. The U.S. Census Bureau classifies both Glacier and Yellowstone as rural remote. An overview of the community and school sites is detailed in Table 1 and participant attributes are listed in Table 2 and Table 3. A detailed account of the data collection strategies, including both documents and interviews, is described in Appendix B, and a table that aligns the research questions to interview questions is described in Appendix C. While the participant pseudonyms are meant to be gender-neutral, feminine pronouns[29] will be used in all narratives, regardless of whether a

[28] Both Glacier and Yellowstone are being used as pseudonyms in this study. The pseudonyms were chosen because they are both significant places in Montana, and place is central to this study. The pseudonyms do not mean that these schools are near these beautiful places.

[29] Feminine pronouns were chosen because K–12 education remains a female dominated profession. I did first use gender-neutral pronouns, but the grammar in the narratives became confusing at times.

participant identifies as male or female in real life. This is meant to protect participants' anonymity.

Table 1. Community and school demographics

Demographics	**Glacier (pseudonym)**	**Yellowstone (pseudonym)**
Community population* - town	1500-2000	2000-2500
Community population* - county	3500-4000	Between 65,000-115,000
Population by race, % white alone*	Greater than 90%	Greater than 90%
Population by age, 65 or older*	25-30%	10-15%
Distance to urban areas, miles	Between 50-100 miles	Between 150-200 miles
Locale code**	Rural remote	Rural remote
Geographically disadvantaged county***	No	No
Current population for K–12 students in town (2018-2019)****	Between 400-500	Between 300-400
Current population for primary school site (2018-2019)****	150-200	Between 50-100

*U.S. Census Bureau, 2019 and then provided a range for anonymity.
**National Center for Education Statistics, 2015; SFIC, 2016.
***Cromartie, von Reichert, & Arthun, 2015.[30]
****The OPI, 2019.

[30]According to the USDA, both Glacier and Yellowstone school sites are not in geographically disadvantaged counties therefore scenic amenities may attract newcomers. In Yellowstone scenic amenities greatly impact the economy, but Glacier's economy is more diversified.

Table 2. Personal and professional background information from interviews and surveys

District Site (Pseudonym)	**Participant Number and Gender Neutral Name** (Pseudonym)	**Region[31] where they grew up THEN Region where they attended college**	**Content Area** (Core Subject or Elective)	**Elementary or Secondary**	**Total Teaching Experience/ Rural Teaching Experience** (Early Career, 1-3 years; Professional, 4-8 years; Veteran, 9+ years)
Glacier	1 - Mac	Mountain West THEN Mountain West	Core	Secondary	Veteran/ Veteran
Glacier	2 - Jean	Northeast THEN Mountain West	Core	Secondary	Early Career/ Early Career
Glacier	3 - Pat	Mountain West THEN Mountain West (online)	Core	Secondary	Early Career/ Early Career
Yellowstone	4 - Sam	Northeast THEN MidAtlantic and Mountain West	Elective; Core (past)	Secondary; Elementary (past)	Veteran/ Veteran
Yellowstone	5 - Erin	Mountain West THEN Mountain West	Core	Elementary	Veteran/ Professional
Yellowstone	6 - Alex	Midwest THEN Midwest and Mountain West	Core	Secondary	Veteran/ Early Career
Yellowstone	7 - Charlie	Northeast THEN Northeast	Elective	Secondary	Professional/ Professional

[31] According to the Census Bureau Regional Office Boundaries, January 2013. Retrieved from https://www.census.gov/about/regions.html

Table 3. Professional and financial background information from interviews and questionnaires

District Site (Pseudonym)	**Participant Number and Gender Neutral Name** (Pseudonym)	**Do they have a graduate degree (MA, EdD or PhD) related to education/their content OR do they plan on pursuing one?**	**Are/were they enrolled in a federal or state program to pay for college (undergrad or grad) loans?**	**Do they own a home within the town or region where they taught?**	**Do they have a second (or 3rd, etc.) job to supplement their teaching salary?**
Glacier	1 - Mac	No	No	Yes, region	Yes
Glacier	2 - Jean	Yes, enrolled 2019	No	Yes, region	No
Glacier	3 - Pat	Yes, enrolled 2019	Yes	No	No
Yellowstone	4 - Sam	Yes, complete	No	Yes, town	Yes
Yellowstone	5 - Erin	Yes, complete	No	Yes, town	Yes
Yellowstone	6 - Alex	Yes, complete	No	Yes, region	No
Yellowstone	7 - Charlie	Yes, complete	Yes	Yes, region	Yes

Note: None of the teachers are National Board Certified

Participant Biographical Information

Participant 1, Mac, grew up and attended a university in the West. She described the towns she lived in as suburban but with a lot of space, including open fields. Her initial degree was in a content area, not education; so, after college, she moved to Montana to pursue a job in agriculture and outdoor recreation. In the winters, she had downtime, so she enrolled in education classes and eventually completed a degree in education for a secondary core content area. Mac completed student teaching and was hired in the community she had previously worked in as part of the agricultural industry. When asked if she applied to teach in any other districts, Mac shared that she did not, although she did look online at other places. Ultimately, Mac did not want to move from

where she lived at the time. "I already had my, my kind of the community that I belonged to, which was living in the area—[other job]—that was my career. Then teaching came along, and I thought yeah, I'll try it. I'll give it a shot. (laughs)" (M.R1.00:11:23). Mac is now a veteran teacher, and she has remained in the same district throughout her tenure. Through her interviews, she expressed both acceptance of community culture and frustration that there is not more consistent support for education in the community. Mac planned on returning to Glacier for the next school year.

Participant 2, identified as Jean, grew up in the northeastern United States, but she attended a university in the West. When asked to compare where she currently teaches to where she grew up, Jean said, "I think this is the polar opposite of what I experienced growing up" (J.R1.00:18:42). Jean currently lives outside of Glacier, so she is socially connected to the region but not necessarily the immediate town/school. Jean is married to someone from the region. Jean expressed wanting separation between her professional and personal life. She lived in town for a semester and felt like she "lived under a microscope"; however, she enjoys living in the region because of the outdoor opportunities and for social reasons. At the end of the school year, Jean chose to leave her school in Glacier but planned on continuing to teach in a different district. This will be discussed in detail in Chapter Four.

Participant 3, Pat, grew up in an agricultural community in the West, and she lived in an agricultural community most of her adult life. Pat shared that growing up in a smaller town helped her immediately connect with her Glacier students. Pat did not work in education initially, but a major change in her personal life prompted her to explore

other occupations. The community she lived in at the time was needing teachers, so Pat began tutoring and subbing. When she first started working with students in her home community, Pat observed that students "didn't have confidence – the students didn't have confidence in their own ability because they've been through so many teachers in a short amount of time" (P.R1.00:47:57). This motivated Pat to enroll in a non-traditional teacher licensure program, online, so that she did not have to move her family. By the time Pat graduated from the online teacher education program, her children had also graduated from high school, so Pat could pursue "an adventure" as she called it, moving anywhere to teach (P.R1.00:11:26). She chose Glacier because it was relatively close to one of her children, and it initially reminded her of where she came from. Pat shared

> There's no such thing as a stranger—it's just somebody I haven't met yet! I'm very comfortable with who I am, and where I fit, and…now, inner city I might struggle a little bit, only because I love Montana and being outside in nature, and would I be a great teacher in the inner city? Probably. Would I feel comfortable?…mm, maybe not…so part of it is knowing yourself and knowing, being comfortable in who you are. I love an adventure (P.R1.00:10:44).

At the end of the school year, Pat resigned and signed a contract with a school district in Wyoming. This will also be discussed more in Chapter Four.

Participant 4, Sam, grew up in the suburbs of the Northeastern United States. Sam describes her childhood as spending a lot of time outdoors, helping with chores, or exploring the forests and streams on her family's property. She attended undergraduate college in the Mid-Atlantic region, where she did not major in education. After several years of working in the West, Sam decided to go back to school to earn her elementary teaching license. She did this through a non-traditional program in an urban setting. When she completed the program, however, she knew she wanted out of the city, so

she applied to rural schools in mountain towns where she eventually got a job offer. Later, while teaching, Sam also earned a master's in a content area of education. Sam has worked in the Yellowstone school district her entire career, and she qualifies as a veteran teacher. She planned on returning the next year.

Erin, Participant 5, grew up and attended college in the West. She earned a traditional education degree and received a job offer right away to teach in the Southeast. Erin felt that she was completely unprepared to work with the population of students she taught her first couple of years. "I was really frustrated with my program because I felt like I got thrown into a classroom where I was responsible for children, and I had no idea what I was supposed to be doing. I cried every night when I went home from school" (E.R1.00:05:08). Reflecting on the challenges of her first years teaching, Erin describes the experience as transformational. "I realized when you go into a district, honestly, no matter what skill set you have, you have to be able to adapt and to learn about your students and their families, and the policies of the school, and the curriculum of the school. That was big" (E.R1.00:06:29). Erin went on to teach overseas and when she returned to the United States moved to Yellowstone. "I am an eternal lover of learning, right, and so I don't ever foresee my workload getting lighter. I think it's just going to change. The focus of what I'm looking at is going to change" (E.R1.00:11:43). She is considered a veteran teacher overall and a professional teacher in her current school district. Erin planned on staying in Yellowstone.

Participant 6, Alex, grew up and attended college in the Midwest. She takes pride in coming from a family of teachers, and she lovingly referred to the neighborhood she

grew up in as "Teacher Row." Eventually, she earned a graduate degree outside of K–12 education, but decided she wanted to be in the classroom—not doing research—so she also earned a non-traditional teaching certificate in the West. After teaching in a more urban area, Alex and her partner wanted to teach and live in a smaller community. Alex is considered a veteran teacher, but she is still an early career teacher in her current, rural school district. She was committed to staying in Yellowstone.

Charlie, Participant 7, is from a suburban area of the Northeast and attended a university in the same region. She completed a traditional education program and then moved out West to pursue "adventure," with no specific career. After living in the West for several years, she earned her master's in her teaching content area and taught several courses at a local college. Then she started substitute teaching in Yellowstone, where she was eventually hired fulltime to teach elective classes. The county where she grew up was one of the poorest in the state, "so a really different socioeconomic background from where I am now" (C.R1.00:00:48). The town where she grew up was also near a military base, so had "quite a bit more diversity ethnically and just kind of in general" (C.R1.00:01:00). She is considered a professional teacher, at her rural school and overall. Charlie left the Yellowstone school to pursue a non-teaching career at the end of the year. The semi-structured interviews with these seven participants will be analyzed in conjunction with state and local policies in Chapter Four.

Chapter Summary

This multisite case study explored how Montana addressed school funding with a focus on teacher recruitment and retention in rural contexts. The multiphase participatory

design included semi-structured interviews and CPDA, which provided a rich understanding of how teachers in unique rural communities perceive the phenomena as well as the potential solutions. The qualitative work also provided insight into the values and cultures of these schools, which is integral to place-consciousness (Gruenewald, 2003a, 2003b), as well as providing equality of opportunity for students (Montana Constitution, 1972). The case study in conjunction with CPDA provided a holistic view of Montana's recruitment and retention of K–12 teachers in rural contexts, which is evident in Chapter Four.

CHAPTER FOUR

FINDINGS

Introduction

> This Court noted the continuing problems with the recruitment and retention of teachers in isolated districts. While the state has made progress in this regard, it would be helpful if more could be done to ease these problems. As noted, increasing salaries for rural and isolated districts would have a noticeable impact on recruitment and retention problems.
>
> – *Columbia Falls v. State*, 2008

> It does stink to think, all right, I'm teaching in Glacier and I'm getting paid this amount of money, which is standard for Class B, and there's somebody down the road in a Class A school that's making more for doing the same thing. That to me, that also doesn't make a lot of sense…
>
> – Mac, Participant 1, 2019

Throughout this chapter, findings from the CPDA of foundational documents are shared in conjunction with the findings from the interviews with teachers from each school district site. Both CPDA and the interviews are used to answer RQ1, RQ2, and RQ2A:

RQ 1. Is the State fulfilling its responsibility to provide equality of educational opportunity to students in rural schools through supporting teacher recruitment and retention?

RQ 2. What have been the outcomes, in terms of adequate support (funding, curricula, and accreditation) for teacher recruitment and retention in sample Montana rural school districts since the initial *Columbia Falls v. State of Montana* (2004/2005) decision?

A. How has state policy affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?

However, RQ2B is answered using the interview findings only.

B. How has local policy, as perceived by practicing K–12 teachers, affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?

Findings from the policy texts and interviews are organized into five themes that align with the five dimensions of critical place-consciousness (Gruenewald, 2003a, 2003b) and political values (Fowler, 2013). All five dimensions of critical place-conscious theory were evident throughout the interviews, and each of these dimensions interacted with different political values in specific ways. Therefore, the themes are: 1) The sociological dimension of place: Recognizing responsibility, 2) The political dimension of place: Advocating for economic efficiency and economic growth, 3) The perceptual dimension of place: Believing in equality of opportunity, 4) The ideological dimension of place: Aspiring for quality, and 5) The ecological dimension of place: Engaging in systems of power. The themes are organized to align with the order of the prompts/questions from the semi-structured interviews. For example, one of the first prompts was for participants to describe the school and community in which they work. During initial and values coding, I connected participants' descriptions of schools to the sociological dimension of place and responsibility; therefore, the sociological dimension of place is the first theme discussed in the findings. Figure 6 displays the relationships between the data, themes, and key findings.

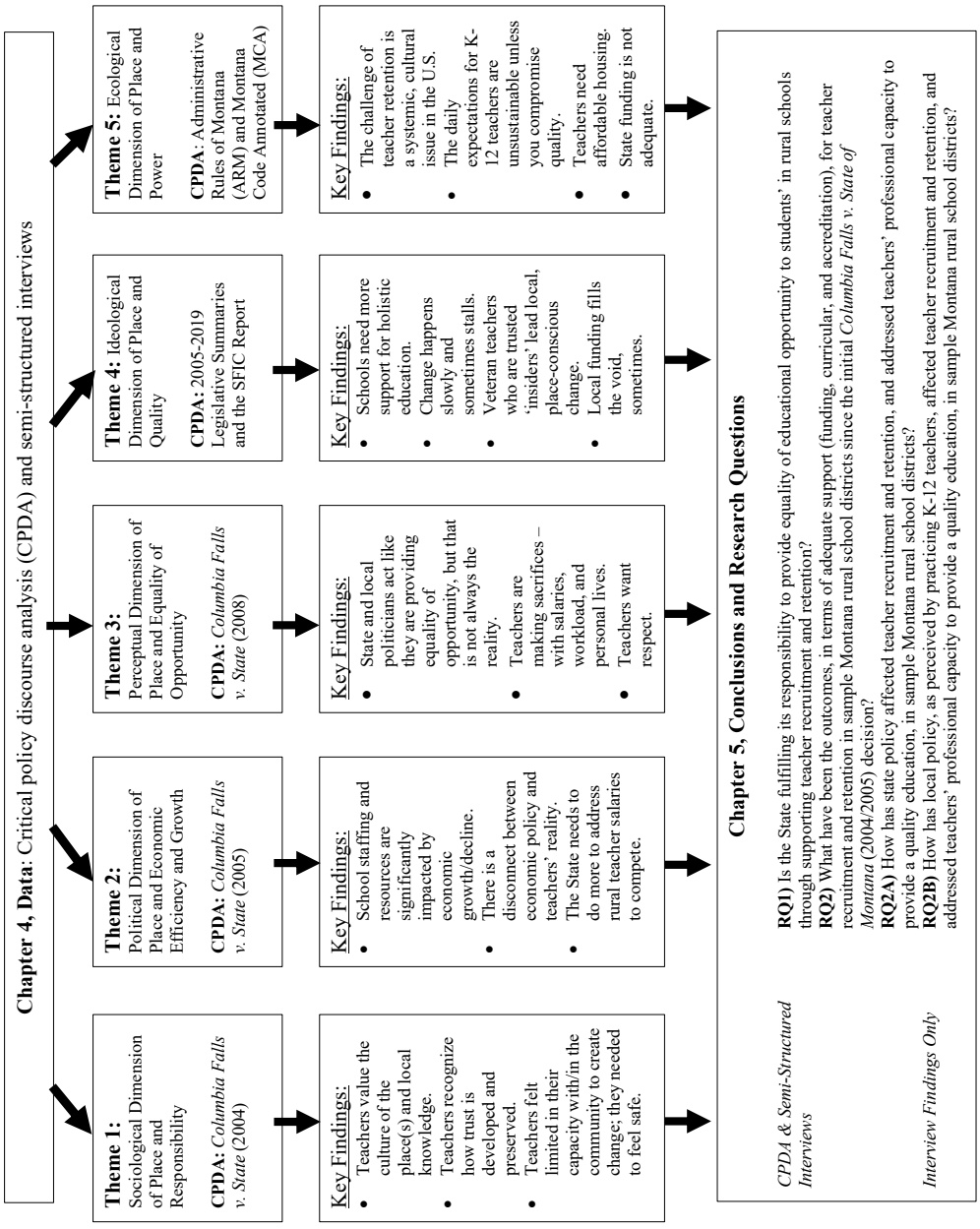


Figure 6. Key findings aligned with themes

Findings

Theme 1: The Sociological Dimension of Place: Recognizing Responsibility

> People of Yellowstone are very protective of Yellowstone, no matter if you moved here five years ago, 10 or 20. That might be, for some people, tough to feel that. But as soon as you get in, and it takes a while, then you get the family feeling of wow, everybody's super supportive. But that takes a while. Some people after a year don't feel it and they want to go.
>
> – Sam, Participant 4, 2019

Introduction to Theme. The findings that align with theme one, the sociological dimension of place and responsibility, explain how power and culture manifest in place. This theme includes CPDA of *Columbia Falls v. State* (2004), which determined that the state had a responsibility to adequately fund public schools. This theme also describes how teachers take on additional responsibilities, especially in rural communities, and includes description of the participants schools and local towns since community culture influences curriculum and instruction. Gruenewald (2003a) writes, "Recognizing places are what people make of them—that people are place makers and that places are a primary artifact of human culture—suggests a more active role for schools in the study, care, and creation of places" (p. 627). This theme is discussed first to understand the cultural context of the school sites and rural places in the study.

How Montana Views Public Education: The Responsibility of the State and Local School Boards. Like places, education is a socially constructed product of culture. Education and the legal system simultaneously have their own culture, and education is influenced by culture(s). Therefore, it is important to recognize the genre of the

discourses and the intended audiences. While some audiences will be able to comprehend the language of the courts, there will be a disconnect between the courts and other audiences. This suggests a divide, and even a hierarchy, where those making the legal decisions may not fully understand the culture of education, and those in education may not understand the judicial or legislative reasoning. In Montana, the courts serve as a check on the legislative branch, the legislature acts on behalf of their constituents, and the constituents are both consumers and producers of education, which is guaranteed by the state.

Columbia Falls v. State (2004) is directed at the plaintiffs and defendants involved in the court case as well as future legislatures, and the general public. The plaintiffs included the Columbia Falls Elem. School Dist. No. 6 as well as 10 other elementary or high school districts, Montana Education Association-Montana Federation of Teachers (MEA-MFT), the Montana School Boards Association (MTSBA), the Montana Rural Education Association (MREA), SAM, and six parents of minors. The defendant was listed as the state of Montana. The text genre is adjudication since excerpts come directly from the First Judicial District Court of Montana in Lewis and Clark County where Judge Jeffrey Sherlock delivered the Findings of Fact, Conclusions of Law, and Order.

The Findings of Fact included over 15 sections focusing on the State Constitution's educational goals and duties and the history of Montana's school finance system. This text is publicly available through the Lewis and Clark County Courthouse, but the text used for this CPDA was obtained from the academic database Nexis Uni, so

that format would be consistent across court discourses. The court document is 25 pages; however, the analysis in this chapter focuses on excerpts relating to the phenomena of providing an adequate education as well as teacher recruitment, professional development, and/or retention.

Within the sociological dimension of place, subthemes of the court document included adequacy, equality of opportunity, and quality education. The CPDA demonstrated that the court recognizes a shared responsibility, between state and local entities, for funding quality schools. Such a view of responsibility is consistent with broader sociological values highlighted in Montana, such as local control, while also noting rural communities have unique cultural aspects that result in needing additional support from the state.

Argument Reconstruction. Figure 7 below shows the relationship between Judge Sherlock's claim, the goal(s) of the court case, the circumstances, the values, and the actions Judge Sherlock suggests.

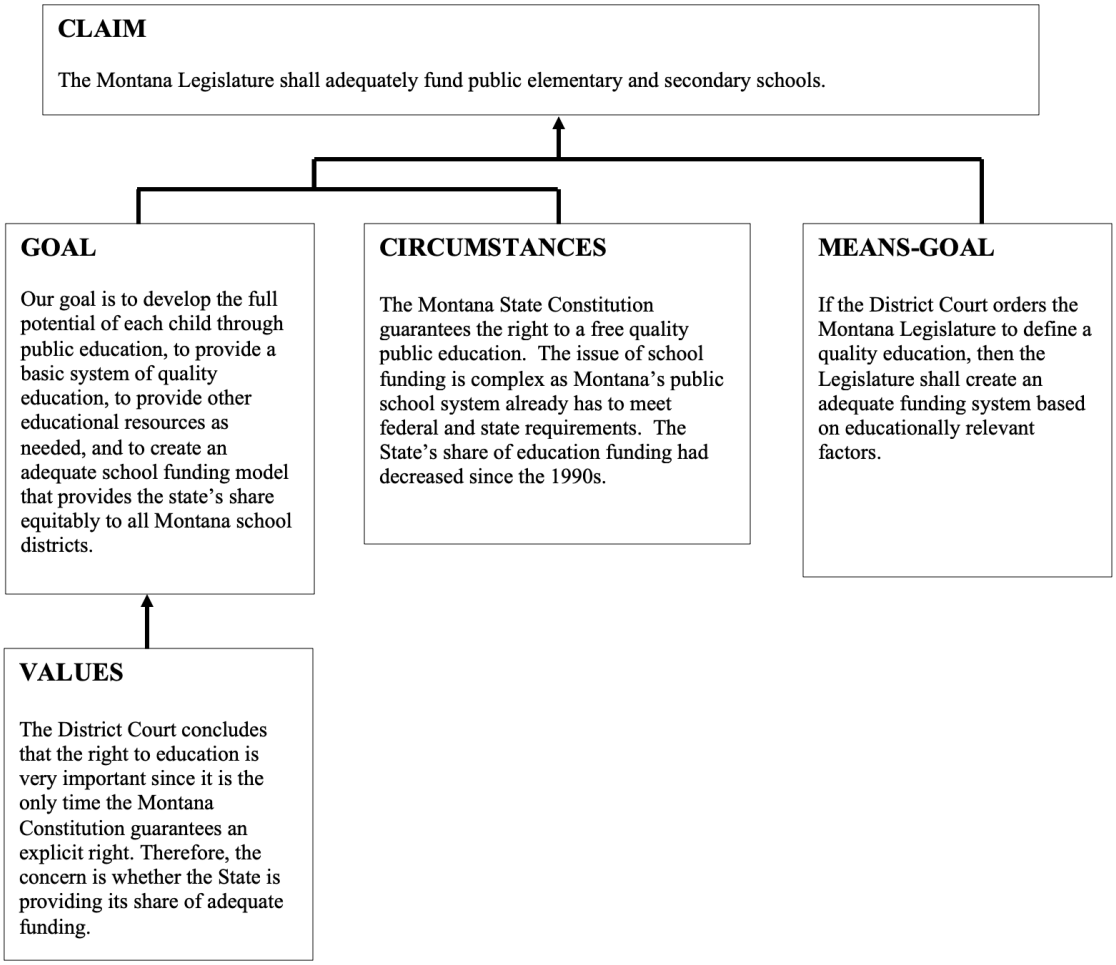


Figure 7. Argument reconstruction, *Columbia Falls v. State* (2004)

The claim tells the reader that it is primarily the state's responsibility to fund public education, not local or federal governments. However, the circumstantial premises describe the intricacies of today's educational systems. While states are obligated to fund their elementary and secondary systems, local districts must also share this duty, and the local districts must abide by both federal and state mandates Judge Sherlock listed. This shows how intertwined the levels of government are in providing an adequate and quality education, which relates to the sociological dimension of place and responsibility.

Judge Sherlock clearly describes the goal of the court case and rules that the state has acted unconstitutionally on several accounts. He cites evidence that the current funding model was not providing adequate funding for educationally relevant factors such as curriculum (including IEFA), instructional resources, facilities, and even salaries/benefits for teachers. The judge requires that the legislature take immediate action because of the immense value that Montana supposedly puts on elementary and secondary education; there is a disconnect between constitutional obligations and the legislature's education funding.

Judge Sherlock recognizes the complexity of the issue at hand in the means-goal, found in the Conclusions of Law and Order in the court document. However, he finds the state responsible for providing an adequate and equitable education. Judge Sherlock provides rationale for the means-goal when he writes:

> This Court takes into account the fact that some of the damage that the educators testified to at trial is prospective in nature. However, this evidence is persuasive and relevant. Just as the Montana Supreme Court did not feel it necessary to wait for "dead fish [to] float on the surface of our state's rivers and streams before its farsighted environmental protections can be invoked," this Court finds that it should not have to wait until Montana's school system collapses in financial ruin prior to entering an order in this case (*Columbia Falls v. State* – Conclusion of Law and Order, 2004, ¶12).

Sherlock's metaphor, comparing the insufficient funding system to dead fish, reflects the sociological dimensions of place and the significance of the environment in Montana. He also validates the experiences of rural and non-rural schools when he describes the evidence as "persuasive and relevant". This relates to the sociological dimension of place, and the idea that all places and stories matter.

Interdiscursive Analysis. Concerning vocabulary, the state's responsibility is discussed in these final two sections of the court document, even though Sherlock recognized that "it [education] is a State and local responsibility jointly shared" when he described the Background and Historical Facts of school funding (*Columbia Falls v. State* – Findings of Fact, 2004, ¶62). Teachers are never mentioned in the Suggested Remedies section or the Conclusions of Law and Order, even though Teacher Salaries and Benefits had an entire subsection under Problems Related to Funding in the Findings of Fact where teachers were mentioned 26 times out of a total of 47 times in the entire document. The word "educator" was used three times in the same section, and it is used 19 total times throughout the entire document. The Court suggests that districts have a responsibility that they are not upholding. The fact that many people blame teachers for an "inadequate" education in rural contexts is problematic since they are not named as agents of change in the Suggested Remedies or Conclusions of Law, and Order.

Judge Sherlock also noted that society influences these phenomena and that communities may have different understandings, regardless of what research may say. For example, Judge Sherlock addressed teacher salaries when he wrote the Findings of Fact, "According to Dr. Linda Darling-Hammond of Stanford University, quality teachers are essential for successful students and a quality education. According to Dr. Darling-Hammond, adequate salaries, working benefits and conditions are a big factor in getting and maintaining a teacher corps" (*Columbia Falls v. State* – Findings of Fact, 2004, ¶112). This relates directly to the value of responsibility, and that both the state and local

school boards have a responsibility to retain quality teachers. This also reflects what the teachers share in their interviews, and their experiences with recruitment and retention.

Sherlock continued citing Darling-Hammond, asserting that when schools have difficulty recruiting and retaining quality, not just qualified, teachers, that the whole education system is at risk. Darling-Hammond "testified that proven research established a significant relationship between teacher quality and student achievement and gains" (*Columbia Falls v. State* – Findings of Fact, 2004, ¶128). The significance could be interpreted as statistical as well as practical, but it was not explicitly stated, however teachers in their interviews also discussed this correlation. The evidence from Darling-Hammond relates to the sociological dimension of place since teachers and school systems have the power to significantly affect student achievement. The focus on student achievement—what it is, how we measure it—is a cultural phenomenon, an idea that states, local school districts, and individual teachers continue to redefine and apply to their specific contexts.

In summary, *Columbia Falls v. State* (2004) initiated major legislative changes to school funding in Montana when Judge Sherlock held the state responsible for defining educationally relevant factors that provide a quality educational experience, thus more accurately funding the state's share of public education. This court decision showed the importance of identifying how education exists in a cultural context and the role that teachers play. The teacher interviews exemplify just how significant context is when teachers are recruited and when legislators are developing public policy.

Teacher Perceptions: "The Small School Setting Really has Some Advantages."

The sociological dimension of place was evident when each teacher recognized the unique relationships they had with their colleagues and communities. In Glacier, Mac shared, "whether you want to be or not, you're definitely a part of the community, especially as a teacher, and the role of a teacher in a small community" (M.R1.00:01:00). Teachers in Yellowstone expressed similar sentiments and even described their small-town culture as family-like. These opportunities for strong connections to the places and people in their community directly influenced their professional and personal lives. The culture of the town and schools can be both an attractant or repellant in terms of teacher recruitment.

How the Culture of the Town and School Attracts or Repels Teachers. All three Glacier teachers described the culture of the town as neighborly. One teacher had her car break down and someone came out of their house, in the winter, to help her. Another teacher posted on Facebook that she needed something for her house, and there was an overwhelming response to help. This "neighborly" feeling translates to relationships between teachers and students. Mac shared that when she first began teaching in Glacier, she lived two blocks from the school and then on a ranch for two years. When Mac lived in town, it was hard to separate work and her personal life. She recalled having friends bring beer to town on the weekends so she would not be seen buying beer in Glacier. She appreciated living on the ranch so she could enjoy nature; however, "there were kids that would come up the house and they'd leave their homework on my dinner table. You know, doors unlocked… 'you weren't here,' that kind of thing. You know coming to the

house, you just don't have that kind of separation" (M.R1.00:18:30). Mac now lives out of town, and she appreciates separating her personal and professional lives, although she recognizes that the separation causes some challenges, too. Mac shared,

> It's tough to become part of the team, and that could be because I don't live in Glacier. It could be because on Sunday instead of going to church I go skiing. It's just, whatever it is, but that's something [being a part of a team] that I would really, really like. I would love it. I interviewed last year, and when they told me there's six or seven other teachers that teach the same subject, I'm like, wow (M.R2.01:05:12).

Both Jean and Pat also wanted colleagues to collaborate with on content. Jean explained, "If I was in a different district in a larger community, I would have a department, I would have other teachers to bounce ideas off of, I would have resources from actual people instead of people that I'm meeting on the internet" (J.R1.00:26:39). Jean also recognized how the smaller school setting allowed for close relationships to form between students and teachers and among the students. There was a sense of responsibility to take care of one another, and that no one should fall through the cracks.

> I love that everybody knows everybody, and I think, for the most part everyone knows when a student is struggling, and we do whatever we need to help that student. And I think...I don't know...there are a lot of benefits of having a close-knit community…the kids have been together since kindergarten, and they've grown up together, and they've kind of evolved as this class. So, their classes are incredibly tight knit and in a lot of ways they look out for each other (J.R1.00:11:35).

When Jean described her relationship with the community, she focused on how separating her personal and professional life was important because, when she lived in Glacier, she felt like she lived at the school. When asked if living outside of the community was beneficial for her work-life balance, even though she had a 30-minute-plus commute going each way, Jean said it was really nice to "not be under a

microscope" and that she was "definitely happier not living in town… it's just a really small community" (J.R1.00:10:21). Pat also used the phrase "living under a microscope" and expressed wanting to live in a small town with a little larger population (P.R2.00:53:30). All three teachers described a heightened responsibility working in a small town, and all of the Glacier participants emphasized a need to separate their personal lives from work.

Pat described how schools are often the pillar of a community, especially in a small town, and how traditions can dominate decision making. There seemed to be an expectation that teachers have a responsibility to assimilate into that culture, but the district and state do not uphold their responsibilities to support teachers during the time needed for that assimilation. This demonstrates that there is a disconnect between what is happening and what is supposed to happen. Pat added that, if a school closes in an especially rural community, "the town dies, they know that" (P.R1.00:28:00). The school in Glacier was not in danger of closing, but the student enrollment was declining, which impacted school funding and staffing and placed even greater responsibility on teachers. For example, in Glacier student enrollment dropped enough that teaching positions were lost, but the instructional need for the content area was still equal to one and half teachers. Therefore, teachers ended up having very full classes with multiple courses to prepare for, and a teacher whose course load may not be as full gets assigned one of the "extra" courses to help fill that "half". Glacier has been listed as a school impacted by the critical quality educator shortage since 2013.

As the only veteran teacher interviewed in Glacier, Mac also elaborated,

> I think the community's changing. I think it's an attempt to try to hold onto something that's an ideal, maybe not a reality. The ideal is that it is a rural ranching community, the reality is that the ranching is for the privileged people really. The people with money are on the ranches, and the school population, at least the kids, are not from that background as much. We have a lot more kids that don't live in those types of homes and in those types of families, really what I mean is that we have a lot more kids living within the poverty level…We certainly have the ag environment, kids listen to country music, they wear boots, they go to brandings, but I wouldn't say that would define our student body (M.R2.00:15:29).

Jean also described how the community is changing due to economic lack of opportunities in town. Due to the increasing demand for social-emotional services to support students living in poverty, Jean recognized that it was sometimes a challenge to get students the appropriate help (J.R1:00:13:35).

Jean also shared her experiences regarding the culture of the town—that she was seen as an insider even though she grew up on the east coast because she was engaged to a community member of Glacier when she was hired to teach.

> I didn't really have to prove myself to anyone starting off because they already knew who I was, and I was already established with the [Glacier family]…however, it was very uncomfortable to go out, or to really do anything in the community. Whether that was grocery shopping or getting a beer after work or, there were, there were always people there judging your actions even if I'm not doing anything bad (J.R1.00:07:19).

While Jean's in-laws continue to live in Glacier, Jean and her partner live in a nearby community that is a little bigger, population-wise. "I personally am just not a fan of living in a small town. It's not for me, it's too small. I feel weirdly judged a lot of the times…" (J.R1.00:26:12). Jean recognizes that this may be due to her age and/or gender, and she expressed frustration that she was treated unfairly based on personal traits instead of colleagues and community members respecting her as a professional.

Finally, Pat, who lived in a different agricultural community before moving to Glacier, describes her experience being a divorced, single, middle-aged adult. She agrees with Mac and Jean that a close-knit community has many benefits for student culture, but finds it challenging in her own social life. While she "knew what she was getting into" Pat had also hoped to have something in common with the culture of the town. By the end of the school year, Pat commented that, it was "not enough" and that she was looking forward to moving, "going to a little bigger school, bigger town, I think will take a little bit of the pressure off my personal life…" (P.R2.00:53:37).

Like Glacier, the Yellowstone teachers felt that the smaller community population allowed for meaningful relationships to form with students and their families. Erin felt that her "quality of life is really high," but that it did not come without [economic] sacrifices in order to live or work in the community (E.R2.00:32:13). All four teachers agreed that any sacrifices they made to be in the community were "worth it," which implies that sacrifice may be an inherent responsibility in rural contexts (E.R2.00:32:18). However, the four Yellowstone participants recognized that not all of their colleagues felt that same way, that for many teachers the economic challenges of teaching and living in the community were too great. This is a key reason why Yellowstone also continues to be listed in OPI's report of schools impacted by the critical quality educator shortage. Alex shared, "People are at different places in their careers, so I was really surprised when I met with my principal about my observation this year. There's only, I think in this building, like three tenured faculty" (A.R1.00:01:28). This is another example of the sociological dimension of place and how small towns expect/need a long-term

commitment but want teachers to assimilate instead of the school, district, or community changing to better fit the expectations/needs of the teachers. This assigns the majority of responsibility to teachers even though, practically, schools and the state have a responsibility to recruit and retain teachers.

All four teachers describe the Yellowstone culture as a "small town." Having grown up outside a metropolitan area, Sam commented, "I probably could have moved somewhere, get paid twice as much but have to live in New Jersey or Connecticut and I don't want to be ... I don't like a lot of people, so it's that hometown feel" (S.R1:00:34:53). Sam elaborated, "In a small place you know everything about everyone. You get along, you say hi to everyone, you wave, you do that, you have that really supportive, if something happens to a family everybody steps up" (S.R1.00:27:54). She also noted that, if someone or a group in the community disagrees with an initiative or there is a conflict, it can seem more dramatic or have more of an impact since the community is so small.

Both Sam and Charlie focused on how the exponential growth in Yellowstone is changing the community.

> This town's going through its huge change right now, which there are people who cannot accommodate or want to be flexible with that change, they're argumentative and conflict. If people think it's going to be like it was five, even three years ago, five years ago, 10 years ago, it's not. Personally, politically, I would like to see more outreach … I feel like the youth have not been contacted, they have not been asked what you want to see, because they are the ones who are going to be living here after us, so that bothers me and hopefully that will come (S.R1.00:29:58).

Sam shared that students were disappointed that they had not been consulted on community decisions including the development of a new recreation center. Sam also

shared that adults in the community who live there full-time were just recently (in the month prior to the interview) asked their views about the growth in Yellowstone. Previously, the business leaders were making all the decisions, and the community just had to respond or live with their decisions.

> … when all this started it was a small, small little group of people who are making decisions about what this place should be like. This is all allegedly, no one's ever written a truthful report, I don't think. I don't know. What you hear is what you hear. And now there's people saying, 'Let's talk about it.' So that's a great step in the right direction. I don't know, we'll see where it goes, but I just want the youth involved now. That's sort of the next push maybe, I have to lead that with some students who are also concerned, like why hasn't anybody asked what we want. It's important. (S.R2.00:31:07)

Charlie echoed a lot of Sam's feelings about Yellowstone culture and the physical growth that was occurring throughout the community.

> I'm going to start off by saying it's changed a lot and I think a lot of the things that I really love about Yellowstone are changing in a not as great way…Things are just changing and it's a little disappointing, but things that I really like about the town are it's small. People that actually live here know each other really well. You always can bump into a friend wherever you are, and you always have someone to talk to or if you need help with something, there's like 100 people shooting distance (C.R1.00:14:41).

Charlie also emphasized the common interests between everyone living in the community, and that the outdoor recreational opportunities were huge for her, living in Yellowstone. Erin added that even amidst the growth and influx of wealth, she had a relatively laid-back lifestyle.

> I think in Yellowstone, you have the ability to really kind of choose the way you want your life to be. You can be in the hustle and bustle if you want, and you can try to keep up and do that, but I love…I feel like I have a really slow pace of life here. I live a mile away. My commute takes about three minutes (E.R1.00:11:57).

The “hustle and bustle” that Erin refers to are the powerful businesses that control much of the community and the affluence that comes with that (E.R1.00:11:57). She consistently acknowledged that there were different realities in Yellowstone.

Erin also contrasted her experience growing up in a working class town of Montana to teaching in Yellowstone:

> When I was growing up, there was a population of about 10,000 [in her hometown]. There was a rapid decline in population the time that I lived there. The smelter closed in the early eighties, and that led to a lot of unemployment and a big shift for the community…I think probably the most prevalent difference is socioeconomic status. There is, I think, a greater density of wealth here in Yellowstone…You feel like a lot of the people that are here, almost everybody is here because they choose to, not because they're stuck.

Alex discussed the comradery that is similar to the other small communities she had lived in: “Something I really liked about the other smaller schools I worked at was there's just more of a sense of a community in a small place. Like we're all in this together, in terms of the people you work with and the kids you work with” (A.R1.00:09:36). Charlie agreed that the community was supportive and accepting of their teachers.

> I was always taught in college, try to live in the next town over from your school…"Oh, people are always going to be watching what you do. People are going to be like looking at you through a microscope," but that has not been the case here I don't think at all. Everyone is really open and really friendly and non-judgmental, and it's not like I'm doing anything that's judge-worthy, but everyone is really cool. I think something different here is a parent will buy us a beer if we go to the [name of restaurant] across the street after school as opposed to a parent being like, "Oh, oh no" (C.R1.00:17:29).

While the Yellowstone community has many strengths, there were also some challenges. Sam shared that the Yellowstone community can be very cliquey. For

example, when she first moved to town, she had a hard time establishing a group of friends.

> It was the old how long have you lived here conversation. I still hear that around. People of Yellowstone are very protective of Yellowstone, no matter if you moved here five years ago, 10 or 20. That might be, for some people, tough to feel that. But as soon as you get in, and it takes a while, then you get the family feeling of wow, everybody's super supportive. But that takes a while. Some people after a year don't feel it and they want to go (S.R1.00:36:34).

As Sam's comments suggest, that there may be a trust that needs to be earned by new teachers within rural communities like Yellowstone.

Finally, Erin, Alex, and Charlie recognized the tremendous support from families. Families in Yellowstone take responsibility for their students' education and, for the most part, have the privilege and opportunity to get involved at the school.

> The parent support is above and beyond what you can imagine. I always say that our biggest problem is we have too many parent volunteers. And not to say that we don't have challenges, right? But I think it's a very different thing when you have a lot of families who have one parent that is able to stay at home, or they work a super flexible job, and they're able to put that time in for their children (E.R1.00:13:37).

Alex described her experiences in town, where she would be at the grocery store or a restaurant, and parents would comment, "Oh, I heard about you…." Her experiences were overwhelmingly positive. She reflected, "In terms of it being a good fit for me, I think half the battle in teaching is relationships with kids," so Alex appreciates the connections she has made with students and their families even though, at times, she wishes she could be a little more anonymous (A.R1.00:09:02). Like Alex, Charlie described her civic engagement and being recognized in the community as a positive experience overall. For example, Charlie worked as a server in a restaurant and

volunteered with a community group. Both experiences allowed her to interact more with students' families outside of school.

Collaboration: How Relationships Help Recruit, Develop, and Retain Teachers.

All three teachers at the Glacier school site emphasized how they valued their relationships with students and colleagues and that they felt a responsibility to one another. Both Mac and Jean recognized that prior relationships with community members helped them initially get hired. Mac and Jean recognized that, while they had relationships with people in the community, it still took time to earn the trust and respect of the school and town community as a whole. All of the teachers at the Yellowstone site felt that their relationships with colleagues and students kept them teaching at their current school. All four teachers also valued collaboration with colleagues. Even if they taught different content, since they taught the same kids, they felt they could support each other. Erin shared that one of the reasons she stays at her school is because of the emphasis on collaboration and the planning time that is built-in to her schedule. She recognizes that other teachers at her school, especially early-career teachers, may not value that collaboration as much.

> Because we hire a lot of first-year teachers, they don't have a frame of reference and understand what it is like in other districts. When I think about what happened to me when I was in [another state], I felt like I got thrown to the wolves, and I didn't have support, I didn't have collaboration. It was like sink or swim and my nose was barely above the water. And so, I think it's really hard to try to make these [first-year teachers], like all teachers, understand just how unique it is here, and that it's not necessarily like that everywhere (E.R2.00:29:07).

This relates to the sociological dimension of place and how Yellowstone has created a culture where teachers accept responsibility for each other whether others are from the area or not, whether others are early career teachers or veterans.

Alex focused more on the relationships with students and their families. She discussed how a smaller community allows for more opportunities to connect.

> In terms of it being a good fit for me, I think half the battle in teaching is relationships with kids and knowing kids and knowing their families. So when you work in a small place, you kind of can build those things, and when the kid comes into your room, maybe you had him two years ago, you already kind of know and you have that relationship and you have that rapport. Although it can backfire if they don't like you or you don't like them and you're their only option. Although I haven't had that experience. That was something I really liked about the other smaller schools I worked at was there's just more of a sense of a community in a small place. Like we're all in this together, in terms of the people you work with and the kids you work with (A.R1.00:09:36).

Like Erin, Alex describes how the school and community at large have created a culture where they are responsible for supporting each other. Sam, who has been in the district longest, recognized that sometimes the relationships between teachers and students are complicated, especially in a small district where teachers may know and engage with a student from elementary school through graduation. As students get older, Sam reflects:

> I have to care about them differently. I'm no longer the most important person in their lives. Literally. So now I need to just make them important in my life, I think, I guess. Not to say that 90% of them love me and do what I ask. But sometimes I am a person who dwells on that 10%. And I...even if it is 1%, it drives me nuts that I do it. But I think because I genuinely care about each of them, that I want them to be successful and take risks and be okay...and pretend that learning is fun. Could be? That you don't have to be so tough and rough around the edges? (S.R2.00:07:00)

Sam shared this reflection during her second interview, which occurred after the school year ended. That year, Sam had moved from teaching elementary to secondary students,

and she shared that it had been a challenge due to the lack of curriculum as well as adjusting to different age groups. Yet, she still went above and beyond to fulfill her responsibility of instructing students and supporting their development.

One of the other participants even noted that relationships influence why some teachers are hired at the school. For example, Charlie served as a long-term substitute teacher before she applied for a full-time job. She applied because she appreciated the community and felt connected to her colleagues. She described Yellowstone's recruitment and hiring process as very informal and did not recall even being interviewed, although this could be because the administration and staff already trusted her. As an elective teacher, Charlie is the only person who teaches her content at her school, yet she still has veteran colleagues to talk with, whether it is problem-solving or sharing resources. She also noted that she has a positive relationship with community groups who financially supported her curriculum and field trips, which provided opportunities that may not exist in other school districts.

Theme 2: The Political Dimension of Place: Advocating for Economic Efficiency and Economic Growth

> Core to that mission [of creating an awesome student experience] is having awesome teachers and retaining those people and making sure those people are happy. So, the board gets it, but then they don't get it, and so that's a little insulting.
>
> — A Participant, 2019

Introduction to Theme. The findings that align with theme two, the political dimension of place and economic efficiency and growth, explore how power and politics are established in places. The theme includes CPDA of *Columbia Falls v. State* (2005),

which affirmed that the state had a responsibility to adequately fund public schools thus uplifting traditionally marginalized schools, including rural and underfunded schools. This theme also includes excerpts from the interviews where teachers describe their experiences being recruited and retained, how economics creates opportunity and/or challenges for teachers, how economic decline or economic growth creates uncertainty for teachers and school systems, and how local politics complicate places. Gruenewald (2003a) writes, "Entering politicized space suggests political roles for educators as mediators in the construction of culture, identity, and the places where they emerge" (p. 631). Therefore, this theme shows how teachers explore marginalization within their specific context.

An Appeal: Adequate Funding Based on Educationally Relevant Factors. The political dimension of place is evident in the Montana Supreme Court's *Columbia Falls v. State* (2005) ruling on the issue of whether or not the state legislature is providing an adequate education in Montana, which included the same plaintiffs and defendants as *Columbia Falls v. State* (2004). The Opinion of the Court is presented by Justice Leaphart, which was obtained from the academic database Nexis Uni, but it is also publicly available online through the Supreme Court's State Law Library of Montana or online through the Clerk of the Montana Supreme Court. The court document is 10 pages and covers seven issues; however, the analysis here will focus on issue number two in the Discussion, relating to the phenomena of providing an adequate education, and on the Concur section, where Justices Rice and Gray provide a historic explanation of basic education and the state's share of funding.

Within the political dimension of place, subthemes of the court document continue to include adequate funding, equality of opportunity, and quality education. The CPDA confirmed that the state needed to revise their funding formula to align with educationally relevant factors, which would then allow the state to adequately support the school system. The focus on the states' fiscal capacity to serve the needs of rural and non-rural schools alike is consistent with economic values and the political dimension of place, which recognizes that all places are political.

Argument Reconstruction. The document is organized by seven issues, which the Montana Supreme Court addresses in their Discussion. The structure is in the form of problem-solution for each issue, where the problems are the issues that the State and Coalition are appealing, and the solutions are the Opinions of the Montana Supreme Court. For each issue or problem, the court also cites evidence and judicial precedents to support their practical reasoning. The argument, focusing on issue two, has the following elements:

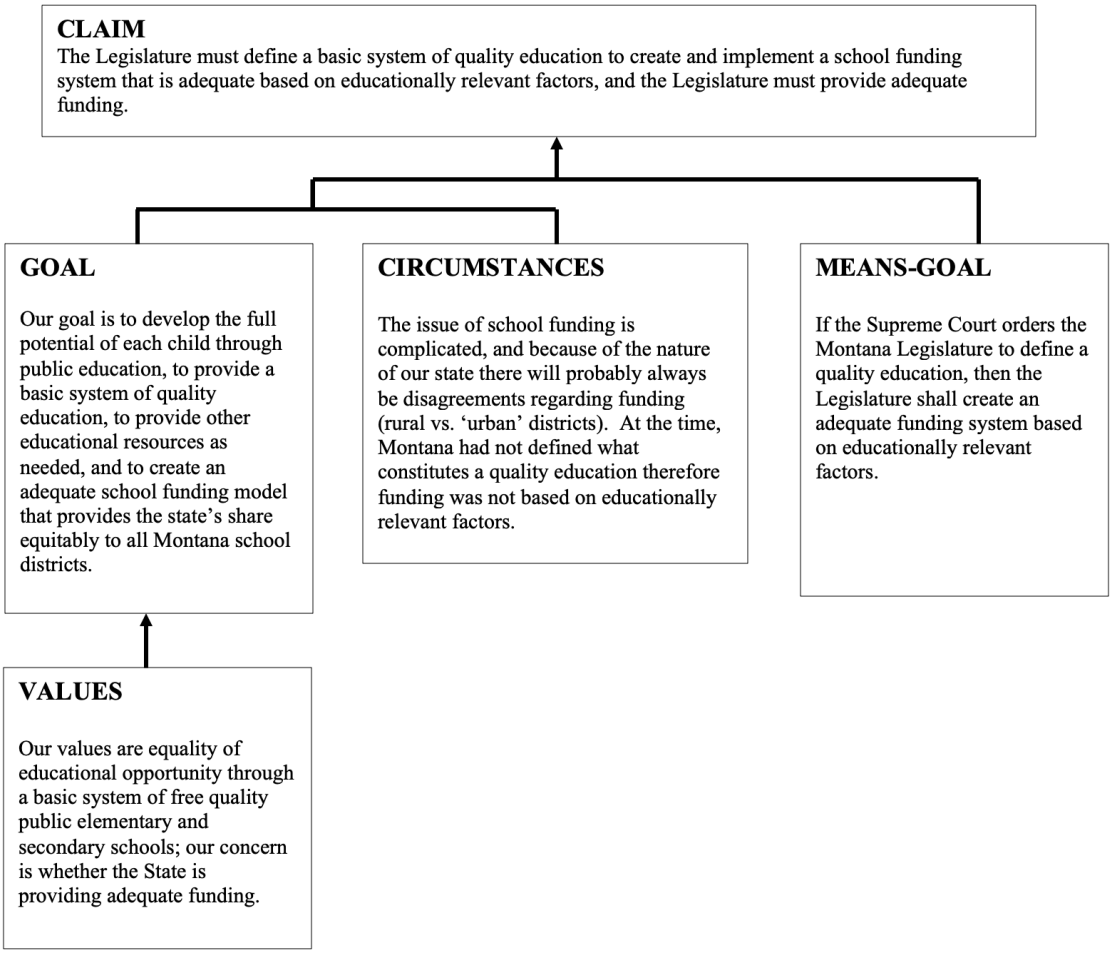


Figure 8. Argument Reconstruction, *Columbia Falls v. State* (2005)

The structure of the argument utilizes past, present, and future tenses since the Supreme Court is reviewing the District Court's decision, the current condition of the school system, and is making suggestions for how the legislature shall proceed. Justice Leaphart presents the court's argument in a rationally acceptable way, providing evidence to support the claim in Figure 8. Similarly to the District Court (2004), the description of the circumstances provides historical evidence that implies that the legislature made an effort to create an equitable education funding system. However, the Supreme Court is explicit

when describing how "the State admitted at oral argument, in passing HB 667, the legislature did not undertake a study of what the Public Schools Clause demands of it. That is, it did not seek to define 'quality'" (*Columbia Falls v. State* – Findings of Fact, 2005, ¶25). Since no definition of quality education existed, the funding system was not constitutionally sufficient. The goals and values are generally the same as the District Court, *Columbia Falls v. State* (2004).

Regarding vocabulary, in both the means-goal and claim extracts, the word "quality" is in quotations, implying that some ambiguity remains around what "quality" entails and what costs are associated with "quality." In the two pages focusing on issue two, the word "quality" was used a total of 26 times; "adequate/adequately" was used four times, "inadequate" was used once, and the phrase "equality of opportunity" was used once and a second time as a proper noun, The Equal Opportunity Education Clause (Mont. Const. Art. X, Sec. 1[1]). Thirteen times "quality" is in quotations, and once the word "system" and the phrase "general fund" is in quotations. No other words or phrases were in quotations in issue two other than direct quotes.

Finally, Justice Nelson, Justice Otter, Justice Rice, and Justice Gray each write further remarks in a section of the court document titled Concur. While Justices Nelson and Otter focus on self-executing clauses, Justice Rice and Justice Gray focus more on issue two, which is directly relevant to this analysis of the court's argument. Rice's remarks use quotes from debates during the Montana Constitutional Convention. Rice notes that while the remarks of a few delegates do not speak for all of the delegates, they help a reader better understand the intentions of the group, which also relates to the

structure of the argument described earlier. For example, starting in paragraph 59, Justice Rice and Justice Gray explain how the term "basic" was an addition to the state constitution because the public expressed concern that they wanted to keep some control over the "frills" of education programs. Delegate Habedank's expressed that education theorists would try to integrate every "screwball education proposal" into Montana's definition of a quality education if the term "basic" was not included. The word "screwball" implies a distrust or lack of respect for education theorists.

Next, the justices describe what the delegates of the Constitutional Convention meant by "states share" and also focus on the word "shall." The justices interpret "shall" as an obligation "that the Legislature must 'provide'—to establish or make available—a basic system of quality education" (*Columbia Falls v. State* – Concur, 2005, ¶60). However, the state is not expected to fully fund public education, and other sources of revenue, such as local levies, are needed to fund a quality education. This implies that the state provides the basic necessities; however, providing more than that falls on the local government or school system, which may contradict Article X, Section 1(1) of the Constitution. If the delegates believed that basic education is the responsibility of the state and quality should vary between local districts, then their thinking conflicts with the ruling of the Courts.

Justice Rice continues his remarks in paragraph 62 when he describes how HB 667 (1993) had addressed the equity issue (ruled in *Helena Elem. v. State* [1989]), but that, over time, the funding model failed to maintain the state support needed to provide for an adequate education. Rice writes:

> The evidentiary focus on such factors as deterioration of school buildings and the departure of educators is appropriate in assessing the health of the system, but such factors are merely symptoms of the underlying disease: the state's failure to fully fund its share of educational costs. This is a long term, systemic and fundamental flaw which I believe violates the last sentence of Article X, Section 1(3) (*Columbia Falls v. State* – Concur, 2005, ¶62).

Lines one through three provide factors for evaluating the health of the education system, which includes teacher attrition. Rice describes how education is a societal issue and that any problems are "symptoms of the underlying disease," which is the state failing to fund the system based on relevant costs. Finally, in lines four through six, it is notable that Rice describes the disease as long term, systemic, and fundamental. The word "fundamental" is a little ambiguous in this context, but it could mean that legislature has never adequately funded education in Montana, which violates their constitutional duties.

Rice also quotes delegates who recognized how the fiscal capacity of the state affects constitutional duties, saying, "the committee realizes that economic resources of the state limit this [educational] goal" (*Columbia Falls v. State* – Concur, 2005, ¶63). "Fiscal capacity" and "state's share" are both phrases used to describe the phenomena of adequate funding; however, their usage implies different meanings. When fiscal capacity is described, the responsibility seems to fall on citizens, i.e., the citizens are "only" providing this much in taxes, therefore, the state's fiscal capacity is limited when addressing its constitutional obligations such as providing a quality education—i.e., it is not the politicians' fault that schools are underfunded, they are doing the best they can with what they have. When state's share is described, the responsibility is directed at the legislature—politicians are choosing to use the state's funds in specific ways, and possibly for causes other than education—it is the politicians' fault that schools do not

have adequate funds. In conclusion, the Concur section by Justice Rice and Justice Gray provides necessary historical context regarding vocabulary used in Article X, Section 1(3) of the Montana Constitution and also suggests the issue of inadequate education funding is a systemic problem that violates the Constitution.

Interdiscursive Analysis. Adequate funding and quality education continue to be major themes in this legal text that rules on the constitutionality of the legislature's action. Funding an adequate quality education has political consequences and also relates to the economic values of efficiency and growth. The Court ruled that even though a quality education is not defined by the legislature "the educational product of the current school system is constitutionally deficient, and that the legislature currently fails to adequately fund Montana's public school system" (*Columbia Falls v. State* – Opinion, 2005, ¶22). The Court referred to *Helena Elem. Sch. Dist. No. 1 v. State* (1989) where the Supreme Court "concluded that the spending disparities among the state's school districts constituted a denial of equality of educational opportunity as guaranteed by Article X, Section 1(1) of the Montana Constitution" (*Columbia Falls v. State* – Opinion, 2005, ¶23). HB 667 (1993) had been passed in an attempt to solve this issue of equality of opportunity; however, "this funding system is not correlated with any understanding of what constitutes a 'quality' education" (*Columbia Falls v. State* – Opinion, 2005, ¶25). Therefore, the legislature did not develop a funding system that supports elements of a quality education. The Supreme Court explains that "Unless funding relates to needs such as academic standards, teacher pay, fixed costs, costs of special education, and performance standards, then the funding is not related to the cornerstones of a quality

education" (*Columbia Falls v. State* – Opinion, 2005, ¶26). This connects to both the political dimension of place and economic efficiency.

Next, the Court reiterates what they declared in *Helena Elementary,* that "… the accreditation standards establish a minimum upon which quality education can be built" but "do not fully define either the constitutional rights of students or the constitutional responsibilities of the state of Montana for funding its public elementary and secondary schools" (*Helena Elementary, 236 Mont. at 57, 769 P.2d at 692* as cited in *Columbia Falls v. State* – Opinion, 2005, ¶26). This implies that even when the legislature defines a quality education via the accreditation standards, the notion of quality education will continue to evolve, and the legislature's definition does not singularly dictate what is funded and how education is funded. Also, local school boards and districts have significant oversight of curriculum and instruction. The Montana Constitution, including the Equal Protection Clause, will continue to protect the rights of students and hold the legislature responsible for reviewing their definition of a quality education and adequately funding an equitable public school system based on educationally relevant factors, which makes it more economically efficient.

The discussion of education standards and what constitutes a quality education continued, and, in paragraphs 29 and 30, there was an argument over the value of inputs (school district budgets, quality teachers/benefits, curricular programs, school facilities, etc.) versus outputs (standardized test scores). The Court critiqued the state's evidence, which used standardized test scores to show that Montana's students score well compared to their peers in other states, however "there are serious concerns as to whether this level

of achievement will continue. With the District Court's findings of fact in mind, it may be that the achievement registered by Montana's students is not *because* of the current educational system" (*Columbia Falls v. State* – Opinion, 2005, ¶30). Then, in paragraph 31, the Courts again assert that school funding must be grounded in educationally relevant factors, so the legislature must define a quality educational system before proposing a new funding system.

Teacher Perceptions: "We've had a lot of turnover in the last couple of years, but it's been a one way street". The political dimension of place was evident when teachers discussed their communities' financial support or lack of support for the school. Financial support included funding for curriculum and instruction materials, private school foundations, passage of levies, and local initiatives to pay for continuing teacher education. Teachers in Glacier also shared that, historically, levies and bonds were not a part of community culture. The political dimension was also evident when participants discussed the challenges of the local governing bodies; in Glacier, this focused on the school board, and in Yellowstone, this included the school board as well as private interests and businesses.

Recruitment and Retention: How Economics Create Opportunity and/or Challenges for Teachers. Mac was offered her job when she was nearing the end of her student teaching in Glacier. While Mac had established relationships in the school community and was familiar with policies specific to the school, her first year of teaching was extremely challenging.

> Well, Okay, so I took it [the job] because I thought, well, I've done all this work to get this degree. I spent this time. I had a good student teaching experience. I thought, "Well I have this opportunity. I better take it." I took it. My first year was really hard. At the end of my first year, I was ready to quit. I had some influence from a fellow [teacher] who had just retired from, like a 30-year teaching career in Washington State. I told him in June…I told him "I am done. I am not going back to do that. I am broke, I've worked—you know, I did my laundry in the school…I lived…I moved to Glacier…there was no social life for me. It was really not all that great of a situation. I am making far less money than I would as a [alternative career] and I'm putting a lot more work into it." He said, "Why would you want to quit? Now that you've done at least one year, you've kind of paved the way a little bit. Next year, you should at least try one more year to see if it's any easier." And I took his advice, and I did another year, and then that, it was easier. You know, lesson plans were…there was at least some kind of foundation that I was able to build on, and it was pretty good (M.R1.00:14:41).

While Mac did stay for that second year and is now considered a veteran teacher, serving over nine years in the same rural school, she continues to seek out other teaching opportunities in the region like many of her coworkers. Mac shared that when teachers leave sometimes the district is reluctant to hire a replacement due to funding, which is partially due to the economic decline in the community. If the position is not filled, this puts additional responsibility on the remaining staff.

Jean believes that her connection to the community also played a role in her hiring. She went on several interviews during her student teaching, and she ended up getting two job offers, but chose Glacier due to the proximity of her fiancé's family and the availability of housing. Regarding the issue of teacher retention, Jean feels that "they're slapping band-aids on all of this" (J.R2.00:10:44). Jean is frustrated that she was hired to replace two teachers, while some teachers seem to have a lighter workload. Jean wishes that she had adequate time to plan for her courses and grade student work: "I think

I have figured out how to adapt enough to what I'm expected to do every day, but it is exhausting, and I'm spending a lot of time on work, and I don't think, it's sustainable for a regular human" (J.R2.00:19:00). Jean applied for other jobs every year she worked in Glacier.

When Pat was hired, she was replacing two teachers of different content areas even though Pat was only certified in one of the content areas. To compensate for this lack of qualification, the district offered to pay for Pat's master's degree in the subject she was not certified to teach. Pat agreed to this non-contractual offer and, as an early-career teacher with six different courses to prepare for, began taking master's classes halfway through her school year in January. During Interview 1, Pat alluded to it "being a lot," but said she was managing it (P.R1.00:03:58). However, by the end of the school year, Pat decided to take a new job in a neighboring state that would immediately pay her $15,000 more, and she was able to put her master's courses "on pause."

In Yellowstone, Sam shared that, after earning her education degree in an urban area, she applied to all smaller school districts in rural areas where she could enjoy the outdoors. After living in both Idaho and Utah, she had fallen "in love with the western place" (S.R1.1:01). When she interviewed with Yellowstone, she described the community as "family-like" and that "it just fit" (S.R1.00:02:26). The night before her interview, Sam said she stayed at a local campground, showered in a nearby river, and then shared the story at the interview. "They kind of said something like, 'Whoa, you're probably gonna fit in here.' At the time, it [Yellowstone] was just a K–8 school, and they had this big sense of place… that fit right in with the outdoor education stuff that I was

totally into" (S.R1.00:01:44). Sam was offered the job and now is a veteran teacher in Yellowstone who has taught in both the elementary and high school.

While Sam chose to make Yellowstone home, she recognizes that there is huge teacher turnover in Yellowstone, and she identifies three key issues: housing/the commute, the community, and finances. When colleagues cannot find housing, they commute to other towns that are over 45 minutes away, and Sam says they only last a couple of years. Sam chooses to work other jobs outside of teaching just to live in Yellowstone because she could not handle the commute. Often, young teachers move to it for a sort of adventure and then realize they want to be closer to family. Sam has heard that many times. Sam also recognizes that teaching itself is an emotionally draining job, so some former colleagues choose to leave the profession entirely.

Sam's second interview occurred after the school year had ended, and Sam described being burnt out herself, mostly because she was teaching a different age group and new content while simultaneously building her curriculum. She planned on developing curriculum over the summer and taking some time to refresh, but ultimately said, "if I'm not into it like I used to be, I shouldn't be doing it because that's not fair to them [the students]" (S.R2.00:06:00). Sam commented that it was not an issue with the administration.

> They really do everything…If you ask for something, if it's reasonable, they give it to you, whether it's resources, whether it's I want to go learn. Time off has been challenging, but that's not their fault, but getting a guest teacher [substitute] this year was insane. We're all covering for each other (S.R2.00:26:46).

Sam estimated that substitutes were paid about $80 a day and, since most came from at least 45 minutes away, after paying for gas, the pay was not worth it. There were negotiations with the school board to increase substitute teacher pay, but so far that had not passed. At the end of the summer, Sam expressed via email that she was refreshed and excited to go back to teaching.

Erin shared that she initially moved to Yellowstone because her partner at the time had family there and there was a job opening at the school. While the cost of living has always been a challenge, Erin makes it work. Today Erin owns a house with her family, close to the school. “It was kind of serendipitous timing, because the market had crashed and we bought in '13, when the housing prices were at the low. It was the cheapest house in Yellowstone” (E.R1.00:17:59). However, Erin also recognizes that teacher turnover is a real issue every single year: “I think it’s a challenge in almost every single rural Montana school,” and that cost of living is one of the main factors (E.R1.00:26:46). Due to the challenges of recruitment and retention, Yellowstone was in the process of developing a more rigorous curriculum with ties to international programs—this could help the district to recruit on a national and even international scale. Erin believed that teachers who had worked in public schools with the same recognized curriculum may be attracted to working in Yellowstone.

Alex shared that she was also drawn to Yellowstone because of the community feel and the outdoor opportunities.

> We kept coming out here for vacation. My partner and I did. We drew [name] River permits two years in a row. The first time I ever came through here, I made him pull over, and I was like, "There's a school here," and I

> walked around the building, and this was probably in 2014 or 2015 (A.R1.00:04:10).

Alex visited several other small towns in Montana that provided the outdoor opportunities they were looking for, but liked Yellowstone best, so she started reaching out to administrators about job opportunities. “I basically sent them a cover letter and a resume and asked, ‘You going to have any openings?’ And they said, ‘Actually, as a matter of fact’…” (A.R1.00:05:15). Alex was surprised when the interview ended up happening via phone and Skype instead of in person. Alex offered to come to the school, but the administration said that was not necessary. Alex thinks that having candidates come to the community is essential to increasing retention because they can see the community, and teachers can start planning where they would live. “We've had people they've hired and then ended up declining the job because they couldn't find a place to live” (A.R1.00:06:00). Alex added:

> To me, I think that what we pay versus the cost of living here is really...it feels like almost insurmountable. Because the cost of living here is so out of proportion with what people make and really probably the cost of living in most of the rest of the state. I think that's a really key piece to recruiting people and then retaining them. Because a lot of people don't live in town. Adding that commute is definitely a stressor and a challenge, but that's the only way people can afford to do it (A.R2.00:45:15).

Alex concluded that housing will be an ongoing challenge unless the local government intervenes which implies that she expects the state will not take action to help teachers afford housing, but that her local community does have the capacity to address the issue. This also reflects place-consciousness, and Alex’s understanding that the local community can best address the issues of their community. In fact, the community was proposing innovative solutions for temporary housing, however, that did not solve the

issue of home ownership. Alex felt that teachers who stay and decide to grow their families in Yellowstone will eventually want to buy homes and, with the current salaries, housing was unattainable for most. This will be discussed more in Theme 3.

Charlie described how she was a part of the school community before she was hired full-time. As an elective teacher, it was difficult to find a job anywhere in her content area when she graduated from college. She moved out West to be with her partner at the time and did some substitute teaching. After getting her master's degree in her content area, Charlie moved to Yellowstone where she was hired as a long-term substitute. During that time, she was approached for a full-time position that would start the next school year. Charlie does not recall having an official interview before she was offered the job. She took the job because "it existed" and she enjoyed the community (C.R1.00:11:52). Like all of the other participants, Charlie was drawn to the area because of the outdoor opportunities, and she stayed because of the sense of community. Charlie thought the salary trends had remained consistent between the time she was hired and the current school year: "it's gone up, very, very incrementally" (C.R1.00:38:30). It is hard to recruit teachers because of the cost of living: "Honestly, I think the school would recruit just fine if there were places for teachers to live" (C.R1.00:39:10).

Concerning retention, Charlie was leaving at the end of the 2019 school year because the workload had become unmanageable. When asked if she may teach in a different school district, Charlie said no. She felt that the issues were systemic. When she talked to friends at other schools, they were making more money, but also felt that their workload and schedules were unsustainable—that the compensation was not enough for

the time they put in. “If I were to keep working this much, I'm not going to make it.…It's just an incredible amount of work to do and it's not something that you can break up and make it manageable…” (C.R2.00:38:10). For example, Charlie described how she had 100 students who were completing final projects that included portfolios. Since there were multiple aspects to the final project, giving feedback and breaking down grades was extremely time-consuming. Her juniors and seniors were expected to submit their final projects to an external board as well, which Charlie took ownership over. As their teacher, Charlie felt the students’ scores reflected her teaching ability as well.

On top of teaching, Charlie financially had to work a second job during the school year, and a summer job, which was also stressful. “I mean, even with my multiple jobs, I have like $50 in my bank account right now just because that's my own fault, because I've been trying to pay off my loans really intensely, but financially I would not be able to only have this one job” (C.R1.01:05:42). Charlie has a master’s degree plus several years of experience. When she decided to resign from Yellowstone, she shared that for “... me personally, it's more of a workload compensation issue than a commuting, housing issue. Just where I am in my life compared to other, maybe, younger people?” (C.R2.01:01:02).

Concerning the workload issue in Yellowstone, one participant explained that teachers were not given their teaching schedule until the week before classes started.

> We'll sign our contract without knowing the schedule and then we don't know. I don't think I'm exaggerating. Very, very shortly before school starts, they tell us our schedule. For example, this year it's like, "Oh, I have six classes and one prep in the middle of the day and my lunch is 10 minutes long." You know? If you knew that the year before, before you signed the contract, you might be like, "This sucks!" If I knew my schedule before, it would help (_.[32]R2.00:56:26).

[32] The pseudonym is not being shared in order to add another layer of anonymity in this instance.

Another participant shared that teachers had brought up the issue with administrators and that it affects the elective teachers' way more than the other teachers. For example,

> The music teacher does not have one prep, and he's in both schools, so he's...you know, it's not a long walk but he's walking between schools. He has zero preps, or zero free periods, planning periods. We've brought it up, but they said that that was like a board thing, not a contractual thing, so they would not change it (_.[33]R2.00:56:56).

This built some distrust among teachers. One teacher commented, "My suspicion is you're just doing that because you know that you're going to give us a crappy workload and that people will not come back if they know it. That's my suspicion" (_.[34]R2.00:57:51). Of the teachers leaving Yellowstone at the end of the 2018–2019 school year, two out of four were elective teachers; the other two were retiring teachers.

Economic Decline or Economic Growth: Creating Uncertainty for Teachers and School Systems. As mentioned earlier, the economic wellbeing of both Glacier and Yellowstone relies heavily on land and natural resources. Mac describes a tightening of the Glacier school district budget in the mid-2000s when the recession hit, and that the dynamics of the school board changed, perhaps as backlash to the election of President Obama and national politics. Glacier wanted more local control, even though, economically, the town and county struggled with new mining regulations and forest reduction. Mac said that next year, enrollment is increasing again, so, hopefully, the district can afford more teachers, while also continuing to increase salaries. Mac recalls her early years of teaching.

---

[33] The pseudonym is not being shared in order to add another layer of anonymity in this instance.
[34] The pseudonym is not being shared in order to add another layer of anonymity in this instance.

> My first paycheck, I got it, and I went to our office staff. I showed her the check and I said, "I think there's a mistake." and she's like "Well, no, I don't think so. Let's go through it. This is what's removed for taxes and this is what you're making" and I'm like "How am I going to…I can't even…ya know…I've got to pay rent. I've got to live" so the way that I was able to overcome that was that I [worked my other job] every single day that I could. I overlapped weekends starting in the spring, and I still do that! Seventeen years later. My [other job] is an essential part to my yearly income. Our family depends on it. School just doesn't pay, it doesn't pay me enough, and we're not, between our two cars we have you know, over 400,000, nearly 400,000 miles on our cars. You know, we're not driving fancy things, that kind of stuff. We don't live beyond our means. The pay, that is a tough one. Now after 17 years it's gotten a lot better, through steps and lanes, and it's made it where probably within the last three…okay, the [other job] and teaching are nearly equal. Even still, it falls pretty short. The teaching pay—I don't have a master's, and I'm two lanes over pay-scale wise, it's not great (M.R1.00:21:12).

Later, Mac clarified that she has not pursued a master's degree because it would cut into her summer job, which her family relies on financially.

Pat was also frustrated with the economics of teaching in Glacier. As mentioned before, she was familiar with the economic industries of the town because of where she grew up, but Pat felt that sometimes Glacier's local school board made financial decisions based on tradition: "That doesn't mean it's the best or the right way of doing it. That just means it's the way you've always done it" (P.R2.00:41:51). The early career teaching salary was another concern of Pat's:

> I actually rent from one of the members of the school board. Housing in this area, just like [other local towns] is astronomical. There's no way I could afford, I could afford the rent…what he should be charging me, but it's just one of those…he's on the school board, I'm a teacher…we made it work. Also, I'm only getting first year teacher pay. That's been a huge…because I come into this with "I'm an adult, I had debt" You know, you have adult stuff, and all of a sudden, I'm living back on first year teacher pay. It's been a challenge to say the least. Granted I have, some savings, but still, still (P.R1.00:24:28).

When asked if she was working a second job, Pat responded, “I’m going to school! [enrolled in master’s program]…That’s the thing, I could have gotten maybe a second job in the fall when I was not going to school, but (sigh)…Shouldn’t have to, but I do” (P.R1.00:24:50). When asked if she had thought about finding a cheaper place to live outside of the community, Pat responded, “So, honestly, driving every day to somewhere else, no, it doesn’t make sense. I would have nothing left to eat on. I could drive, I just couldn’t eat” (P.R1.00:25:05). In both interviews, Pat brought up Wyoming and how she perceived it as a state that was investing in their teachers and education. Pat recognized that funding may be different there, but she questioned why the state of Montana was not investing more in its teachers. Pat also said, “It’s sad, it’s sad that a state south of us pays considerably more…They [Montana] have to seriously think about it” (P.R1:00:25:17).

The community of Yellowstone relies heavily on outdoor recreation and tourism. The 2008–2009 recession affected the dynamics of the community when certain businesses went bankrupt and others had to merge. More recently, the community—the town, school, and even county—is growing, physically and economically. Several teachers described Yellowstone as an anomaly in Montana, that they “are like opposite of everybody else” (S.R1.00:32:47). The growth leads to more wealth in the community, which also benefits the school. Erin recognized that many of their professional development opportunities and the support for a private school foundation were only possible because of affluence in their community. While there are many benefits for teachers, including grants for housing or master’s degrees via the private school

foundation, teachers also recognize the challenges that growth brings. For example, Charlie discussed how another economic recession could be disastrous for the town.

> This is obviously a place that's totally impacted by finances because it's like vacation. People don't go on vacations or they don't buy a second house when finances are low. I don't really think about it a lot, but it's like what would happen if a bubble burst and everyone left? It would be weird and bad (C.R1.01:04:01).

Erin described how population growth also put the school in an awkward position. Sometimes the number of students in a grade level strained the classroom resources or staffing. For example, the kindergarten teachers had 20 kids per class, which is high for that age level, but not enough to pay for another teacher's salary. Yellowstone's fifth grade was in a similar position. They did not have enough space to fit all of the students in one classroom, and they did not have funding for another teacher, so they opened up a second adjoining classroom for that teacher to have more space.

> As enrollment increases, you hit these funky numbers where the student enrollment, it's really hard...It's high, but it's also really hard to pull a whole other teacher's salary out of what you're going to get from the student ANB[35], to be able to split the kids and to make two small classrooms (E.R1.00:43:23).

Teachers at the secondary level voiced the same concerns. One teacher said she only had 25 chairs, but on the first day of school, she had 40 students show up to class.

Another economic challenge is that sometimes the new students are coming to Yellowstone with specific academic needs. For example, the population of ELLs is increasing, but Yellowstone does not have a fulltime ELL teacher and only several staff members are bilingual.

---

[35] In Montana ANB stands for Average Number Belonging or per pupil expenditure.

> It's just real intense. Like trying to get them [students] up to speed in English. You know, because we have a lot of really young teachers here who are like less than three years' experience…All of the sudden now, I've got to teach this in English and Spanish. I've never taught this before and holy cow and so, that's definitely an area where we could use more help and support, but Admin is aware of it (A.R1.00:10:31).

Charlie also recognized that the administration was aware of the challenges that growth caused. She commented:

> To their credit, it's really difficult when you go from having a tiny student body to...it's still tiny, but it's doubled probably…Well, we have a lot of migrant families and so the numbers can actually change, for how small we are, pretty drastically. If you get five [new] kids in a class, that's a drastic change for us. To their credit, they're doing the best they can. There's just physically not room at the school, which...What are you going to do? (C.R1.01:02:39).

All of the teachers shared that there were plans for a school expansion, and a levy would be on the local ballot in the spring of 2019. They were a little nervous because the Yellowstone community did not always pass levies. Charlie reflected, "It's kind of an impossible puzzle. It's like too many pieces for the puzzle to be done kind of thing" (C.R1.01:03:03).

Even if the community as a whole may not always support the levies, all of the participants commented on the financial support from wealthy families in the town.

> Not everybody here's a rich kid. I think there's that perception that Yellowstone is a wealthy community, and it is, but not all of our students are super wealthy...I guess the benefit of being in a community where there are people who are wealthy and generous is that the kids that can afford to do things, there's a lot of like quiet donations (A.R1.00:04:52).

For example, anonymous donations helped students attend the eighth-grade trip to Washington, DC and a high school art trip.

Local Politics: The Complications of Place. Mac, Jean, and Pat all voiced strong support for their current district superintendent because they felt that he was committed to their teachers, school, and larger community. The superintendent would be considered a veteran of the school district. Even with tight budgets, Mac felt that the superintendent always did whatever he could to support the teachers. Both Mac and Jean mentioned the superintendent acquiring financial support for individual professional development, including two trips out of state for an Advanced Placement (AP) training, as well as new curricular resources such as textbooks.

All three teachers voiced frustration with how the local school board was run and some fear, since there was a perception that student/parent concerns were taken directly to the board without first consulting teachers or school administrators. Historically, teachers had been fired by the board when there was a disagreement between a teacher and community member, even if no official policy was violated. Several teachers used the term "trying to fly under the radar" regarding their role at the school. One teacher described the school board:

> It's kind of been a free-for-all and pick-and-choose by who is the most verbal in the community. That's not a professional way of running a school board. As you know – small towns are kind of cliquey, and it's kind of that way on the school board, and it's really hard to fight that. It's really hard to respect that… when they're [the school board] doing things based on community perception, that's a very slippery slope, and your policies stand for nothing (_.[36]R2.00:43:00).

Teachers in Yellowstone also voiced concerns regarding local government. For example, when she was asked about the role of local government in school funding, one teacher[37]

[36] The pseudonym is not being shared in order to add another layer of anonymity in this instance.
[37] The pseudonym is not being shared in order to add another layer of anonymity in this instance.

commented, “The wrong term is government, which we don’t have. It’s a bunch of organizations—HOAs or businesses—that try to manipulate the system in their own way” (_.[38]R2.00:21:08). She added that organizations were starting to “actually admit or come to realize that there is a housing shortage” (_.[39]R2.00:21:40). This was significant because all of the Yellowstone participants discussed how housing was one of the key reasons why the school struggled to retain teachers.

Prior to the May 2019, election, one of the participants commented on the support of the community. “It’s like you've got this super supportive community, and then you have parts of the community that are living old school. We've had some conflicts with levies come up” (S.R1.00:27:04). She thought the older retired couples or younger citizens, who stereotypically may not support a levy, constituted a small percent of the community population. Sam elaborated that even though some levies had not passed, she was optimistic about the current levy.

> I think they're going to be more supportive. There's just a couple of little cogs in the wheel that you probably have in any town. The difference between a small town and a big town might be something like you might have more people who aren't concerned with the school, whereas here most everybody sort of is in some way or another (S.R1.00:29:01).

After the May 2019 levy passed, Erin shared that it had passed at the highest rate in almost a decade, which was significant since a levy had failed several years earlier. The school board was proactive during the 2019 election season, hosting several informational sessions with the community to explain why the district needed the money.

---

[38] The pseudonym is not being shared in order to add another layer of anonymity in this instance.
[39] The pseudonym is not being shared in order to add another layer of anonymity in this instance.

When asked about local politics, several participants described the local teacher's union and the school board. One teacher shared,

> I've been super frustrated with our union leadership because basically we have one person who is in charge...we haven't had an election since I've been here. He's been the long-time union rep, and we never really do anything until it's time for negotiations. That's the focus…We're just part of NEA. There's no website or anything like that, and I had to ask for this, our Bylaws. Our union is not super functional, active. Our membership was down to like six or seven in the whole district. We might be up to ten or twelve now, so that's something as a group we need to work on, but some of the other members and I have been talking about how that could be a role as a union we can take on, is supporting and mentoring and welcoming new teachers (_.[40]R2.00:35:31).

In Yellowstone, teacher contracts are usually distributed in late spring, after negotiations. One participant[41] who taught out of state before, commented that she felt Yellowstone's hiring schedule was delayed, but thought it might be characteristic of Montana. There is one school board that oversees both the elementary and secondary schools in Yellowstone since it is a K–12 district. Generally, all participants felt pretty supported by the board; however, there were a couple of issues they pointed out.

One, the teachers usually send a representative to the monthly meetings, but the meetings start before school even ends, so that teacher has to find coverage for their classes. Two, some board members have questioned why teachers wanted a raise on their base salary since teachers received an annual salary step on the general pay scale. Teachers also commented on how there was a disconnect between the vision for the schools and the support for teachers.

---

[40] The pseudonym is not being shared in order to add another layer of anonymity in this instance.
[41] The pseudonym is not being shared in order to add another layer of anonymity in this instance.

There is no cost-of-living allotment (COLA) for teachers; however, the Yellowstone district superintendent does receive one which frustrates people and makes teachers feel disrespected.

> Like you [the superintendent] can give that COLA up, so your teachers could have that. I don't know what pool of money that comes out of…So that has really, like, bothered some people. Because that was something we were trying to get last year for the lower, you know, the upper left hand corner of our matrix, just give a thousand dollar cost of living thing for those people, just to help them out just a little bit (_[42].R1:00:17:22).

It was estimated that the superintendent received a $20,000 COLA on top of his annual salary. The teacher continued to express her frustration with the school board since the board subsidized the superintendent's housing, so he could live in town, but he also earned the highest salary in the school district. While the teacher respects the superintendent and additional responsibilities that come with that job, she also shared "it's just disheartening that the school board doesn't have the same vision about the rest of us in that way (_.[43]R1.00:18:09).

Theme 3: The Perceptual Dimension of Place: Believing in Equality of Opportunity

> People don't really understand what teachers do and what school districts do, like politicians and the voters. It's like they don't see value in it, and I think that's a cultural problem compared to somewhere like Finland, right, which is one of the models of education where kids go to school for much less time, but educators are valued. [In Finland] It's very competitive to get into education programs at universities, and they do well. But they're well respected people, and I don't know when that respect was lost [in the United States].
>
> – Alex, Participant 6, 2019

[42] The pseudonym is not being shared in order to add another layer of anonymity in this instance.
[43] The pseudonym is not being shared in order to add another layer of anonymity in this instance.

Introduction to Theme. Theme three, the perceptual dimension of place and believing in equality of opportunity, explores how power and perceptions are revealed in place. This theme includes CPDA of *Columbia Falls v. State* (2008), which determined that the State was making adequate progress toward providing equality of opportunity through the revised funding system. This theme also includes subthemes from the teacher interviews that focus on school funding and personal finances as well as equal and unequal opportunities. Gruenewald (2003a) writes that the "Structures and process of schooling" have historically disconnected teachers and learners from the "outside world" and places beyond the school's physical walls (p. 625). While teachers' direct experiences and expectations shape perceptions about place, the same is true for state and local politicians who create policy for schools. This theme will analyze what the perceptions of equality of opportunity are, and how those are related to place, specifically the Glacier and Yellowstone school sites.

Reviewing the Progress: Is There Equality of Opportunity? Judge Sherlock ruled on whether or not the state was making adequate progress toward providing equality of educational opportunity to all Montana students in the District Court case, *Columbia Falls v. State* (2008). In the text, Judge Sherlock makes explicit references to rural and non-rural schools and the complexity of Montana's education system due to its rurality, which suggests the uniqueness of place shall be considered by the legislature. The Judge's Discussion is based on perceptions of what adequate funding is, how quality education was defined by the legislature, and how this affects rural and non-rural schools.

The document is directed at the plaintiffs and defendants involved in the court case as well as future legislatures and the general public. The plaintiffs were the same as the 2004 and 2005 cases, which included the Columbia Falls Elem. School Dist. No. 6 as well as 10 other elementary or high school districts, four professional education organizations, and six parents of minors. The defendant was listed as the state of Montana. The text genre is adjudication since excerpts come directly from the First Judicial District Court of Montana – Lewis and Clark County, Judge Jeffrey Sherlock's, Findings of Fact, Conclusions of Law and Order. The Findings of Fact included sections focusing on Legislative Actions, Summary, QSIC, Proposed Funding Components and Cost Estimates, What the Legislature Did, State Contribution, accreditation standards, Gifted and Talented, and Cost-Based. Finally, the text included a Discussion, Conclusions of Law, and Order. This text is publicly available through the county courthouse, and my copy was obtained from the academic database Nexis Uni. The document is 24 pages, but this analysis will focus on excerpts that are relevant to defining an adequate, quality education as well as teacher recruitment and retention and equality of opportunity.

The CPDA demonstrated that the state made progress in defining educationally relevant factors and developing a new funding system which ideally provided equality of opportunity for Montana students. The perception of Judge Sherlock was that the large number of school districts, and the unique needs of rural schools opposed to non-rural schools, guaranteed future disputes over funding. Sherlock also recommended that the

state do more to address recruitment and retention in rural areas, which implies that the state had not fulfilled its responsibilities, specifically in regard to rural students.

Argument Reconstruction. When critically analyzing the argument, many of the quotes below come directly from the District Court's Discussion and Conclusions Discussion and Conclusions. This court document is organized similarly to *Columbia Falls* (2004). The structure of the text includes past, present, and future tense. The sentence structure varies between declarative (Findings of Fact) and imperative (Conclusions of Law, and Order) sentences. The argument has the following elements:

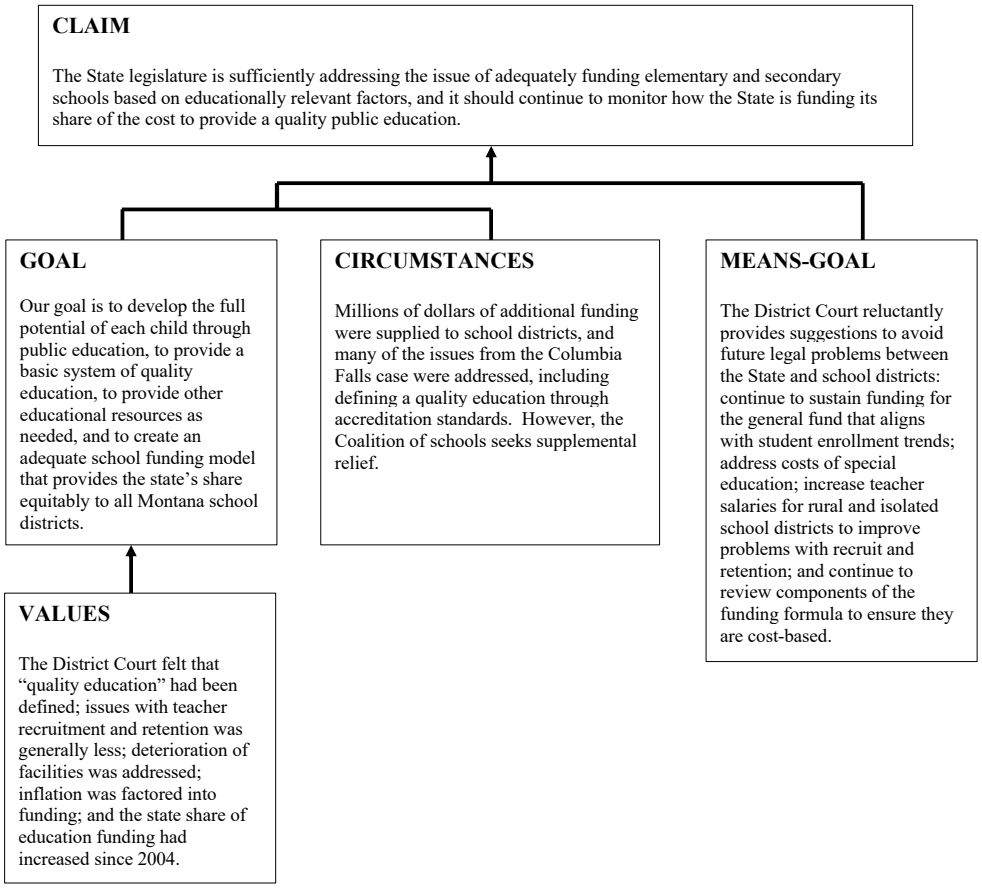


Figure 9. Argument reconstruction, *Columbia Falls v. State* (2008)

The claim asserts that the legislature is making a staunch effort to adequately fund the state's school system based on educationally relevant factors. The values and goals remain similar to the 2004 and 2005 court cases, although there is also the question of whether or not the state was making enough progress toward those goals. Progress is never fully defined; however, in the circumstantial premise, and throughout the entire Findings of Fact, both the plaintiff and the defense provide evidence for defining progress as sufficient funds to address educational issues such as teacher recruitment. Conflicts arise when the sides consider factors such as location or place, and short-term versus long-term goals. The plaintiff argues that there has not been enough progress toward the goal. For example, there are still inequities between rural and non-rural schools, especially considering teacher recruitment and retention.

In contrast, the defendant points out that school districts must take some accountability, and that, overall, the circumstances of the school system have improved, especially considering accreditation status between 2004 and 2007 compared to 2008. Sherlock rules in favor of the defendants but is wary whether the progress will sustain and still questions whether all the state education funding is cost-based. Therefore, in his discussion, Sherlock writes, "as loath as this Court is to provide an advisory opinion, it will make a few comments so as to avoid future problems" (*Columbia Falls v. State* – Discussion, 2008, ¶146. 118). While Judge Sherlock comments on a multitude of issues including the general fund, inflation, and special education, I will continue to focus on teacher recruitment and retention.

When describing the means-goals in the discussion, Judge Sherlock writes that the "Court noted the continuing problems with the recruitment and retention of teachers in isolated districts. While the State has made progress in this regard, it would be helpful if more could be done to ease these problems" (*Columbia Falls v. State* – Discussion, 2008, ¶150. 122). He directly states that increasing salaries, for the rural and isolated schools—no mention of non-rural—would have a noticeable impact. Sherlock also describes recruitment and retention as a problem, not just a factor, which implies that it still needs a more sustainable solution.

While Sherlock does not want to act "as a second Superintendent of Public Education or as a super-legislature" he continues by providing some examples of discrepancies in funding:

> It is clear that some components of the formula are not based on costs…for example, the difference between a basic entitlement for an elementary school district with one school is the same as a basic entitlement for an elementary school district with fifteen schools. Nor is there any relevant study that justifies the difference in the basic entitlement between an elementary school and a high school district. Further, and also troubling, is the fact that, as mentioned above, there is no bright line connecting some of the determined costs to amounts allocated by the legislature (*Columbia Falls v. State* – Discussion, 2008, ¶153. 125).

It is interesting that K–12 districts are not mentioned at all, and that rurality or socioeconomic status is not mentioned in this discussion about entitlements. In the next paragraph, Sherlock does mention rural and non-rural school districts. He questions the necessity for "hundreds of school districts," but he does not make further suggestions (*Columbia Falls v. State* – Discussion, 2008, ¶154. 126). It is notable that he lists rural before non-rural, which implies that it is a priority or perhaps more relevant. It is also significant that the focus is on rural, even the use of non-rural, instead of urban or

suburban. He also describes the directions where schools may be geographically located, and again the "huge number of school districts" (*Columbia Falls v. State* – Discussion, 2008, ¶154. 126). Focusing on the number of school districts and the varied places where these schools are, twice in one paragraph, emphasizes how those two factors complicate the funding system. Sherlock writes that the large number of schools in diverse places is a "guarantee of future disputes" (*Columbia Falls v. State* – Discussion, 2008, ¶154. 126).

Interdiscursive Analysis. This analysis includes the most relevant educational issues identified as needing review by the District Court: the definition of a quality education; accreditation standards, recruiting and retaining teachers, whether the funding provided by the state relates to the needs of providing a quality education, how the costs of providing a quality education were determined, and a school district's ability to provide a quality education. During pre-trial, the parties agreed that the legislature properly defined the basic system of free quality public education in the Montana Code Annotated (MCA), Section 20-9-309(2).

Concerning Legislative Action, during the regular 2004 session, Senate Bill 152 was passed, which is codified as Section 20-9-309, MCA, and has five subsections that define factors relating to a quality education, and it outlines the new funding system. Below is an excerpt from Section 20-9-309, MCA that includes subsections 2–5.

> (2) As used in this section, a "basic system of free quality public elementary and secondary schools" means:
> (a) the educational program specified by the accreditation standards provided for in 20-7-111, which represent the minimum standards upon which a basic system of free quality public elementary and secondary schools is built;
> (b) educational programs to provide for students with special needs, such as:
> (i) a child with a disability, as defined in 20-7-401; (ii) an at-risk student;

(iii) a student with limited English proficiency; (iv) a child who is qualified for services under 29 U.S.C. 794; and (v) gifted and talented children, as defined in 20-7-901… (d) qualified and effective teachers or administrators and qualified staff to implement the programs in subsections (2)(a) through (2)(c); (e) facilities and distance learning technologies associated with meeting the accreditation standards; (f) transportation of students pursuant to Title 20, chapter 10; (g) a procedure to assess and track student achievement in the programs established pursuant to subsections (2)(a) through (2)(c); and (h) preservation of local control of schools in each district vested in a board of trustees pursuant to Article X, section 8, of the Montana constitution. (3) In developing a mechanism to fund the basic system of free quality public elementary and secondary schools and in making adjustments to the funding formula, the legislature shall, at a minimum, consider the following educationally relevant factors: (a) the number of students in a district; (b) the needs of isolated schools with low population density; (c) the needs of urban schools with high population density; (d) the needs of students with special needs, such as a child with a disability, an at-risk student, a student with limited English proficiency, a child who is qualified for services under 29 U.S.C. 794, and gifted and talented children;(e) the needs of American Indian students; and (f) the ability of school districts to attract and retain qualified educators and other personnel.

Lines 3–17 define the factors that constitute a "basic system of free quality public elementary and secondary schools." At the core of this definition are the accreditation standards, described as representing the minimum standard. Minimum and basic standards seem to contradict with the adjective quality used to describe Montana schools. Accreditation standards dictate how schools are staffed and what content educators teach. Lines 6–9 describe different populations of students whose needs must be considered when developing educational programs. This affects both funding and teacher's instruction. Lines 10–11 state that "qualified and effective teachers" are needed to implement the accreditation standards. The word, qualified, is used often throughout Montana education policy discourses, including five times in this excerpt. The term effective is only used this one time, although the word accountability is included. It

seems that being qualified (i.e., licensure) is the start, and then measuring teacher effectiveness is how schools are held accountable for education programs, so it is surprising that the word effective is not used more. It may imply that Montana views their licensure program as rigorous enough that a qualified teacher means they are also effective—a belief that could be debated. Lines 13–14 list facilities, resources for distance learning, and transportation as essential to providing an education program. Concerning facilities, there is no mention about the type of facilities, i.e. classrooms, labs, libraries, gyms/stadiums, etc. Lines 14–15 describe a system to assess and track student achievement, but it does not specify grade levels or who is responsible for this – teachers, schools, districts, or the state.

Lines 16–17 describe how the responsibility of supervising education relies on the "preservation of local control of schools in each district vested in a board of trustees pursuant to Article X, section 8, of the Montana constitution" (MCA, §20-9-309). This indicates that the school boards and districts are primarily responsible for the curriculum and instruction of their students. Lines 18–28 describe the educationally relevant factors that the state must consider, at a minimum, when designing a funding formula. It is notable that "at a minimum" was included since this opens the door for additions and future debates over what should be included. Two place-conscious factors are listed, "(b) the needs of isolated schools with low population density" and "(c) the needs of urban schools with high population density" (MCA, §20-9-309). This is another example of the needs of rural districts being listed first, and it connects to the perceptual dimension of place by emphasizing that Montanans appear to be proud of our agricultural or rural

culture. Perhaps prioritizing, or listing rural communities first, is a way to underscore the perceived culture of the state as a whole.

In the Findings of Fact section on Provisions for Teachers, the District Court focused on "the difficulty Montana school districts have in attracting and retaining teachers" then described the state's actions to remedy this issue (*Columbia Falls v. State* – Findings of Fact, 2008, ¶106. 78). For example, during the 2005 special legislative session, the state set up a Quality Educator component as part of the General Fund payments. According to the Findings of Fact, this payment was estimated to be $3,042 in 2009, and "reflects the costs of raising the average Montana teacher salary to the regional average, adjusted for inflation since the last reported regional salary data" (*Columbia Falls v. State* – Findings of Fact, 2008, ¶107. 79). It is unclear which states are included in the region and citing an average salary may be problematic since a greater number of teachers are in non-rural areas in Montana, thus ignoring the needs of more rural, isolated schools. Another issue to consider is that, traditionally, higher salaries are associated with more experience; therefore, a higher average salary in Montana may not mean that teachers earn competitive pay. Instead, it may mean that Montana has an older population of teachers or teachers that have more teaching experience. A suggestion would be to analyze the average salary of Montana teachers in rural versus non-rural schools, to look at the salaries of educators in schools impacted by the teacher shortage, and to consider the age/experience of teachers. Sherlock elaborates:

> The quality educator payment fundamentally addresses the educationally relevant ability of school districts to attract and retain qualified educators and other personnel. The quality educator payment also addresses the educationally relevant needs of isolated schools with low population density

> because it funds a classroom-based cost regardless of enrollment, as well as urban schools with high population density because it is based on salary data weighted towards larger districts in Montana and more urbanized regional states (*Columbia Falls v. State* – Findings of Fact, 2008, ¶107. 79).

Sherlock is correct that the legislature attempted to address the needs of both isolated schools and larger districts in Montana by funding classroom-based costs. However, in a report by Stoddard and Young (2005) for the QSIC, they recommended that the lowest paying school districts, who struggle to recruit and retain teachers, increase the salaries of their teachers by 10%. If all districts increase their salaries by the same amount, which the Quality Educator Payment does, then there is not added incentive to work in the lower-paying districts. This salary issue was not addressed in the policies enacted by the legislature.

Later in this same section of the court document, Sherlock did cite the Quality Educator Loan Assistance Program as a policy passed by the legislature to address the issue of teacher recruitment. In 2005, the legislature set aside money "to repay up to $ 3,000 of student loans annually, up to a maximum of four years, for quality educators who teach in schools that are impacted by critical quality educator shortages and that teach in licensure or endorsement areas these schools need most" (*Columbia Falls v. State* – Findings of Fact, 2008, ¶115. 87). While this may help with initial recruitment, the program is limited to four years; so, once a teacher has served for four years, this financial incentive also disappears. Another issue is that this program is limited in scope. For example, in 2008, $350,000 was appropriated and in 2009, $700,000 was appropriated for a maximum of 240 teachers each year. It is unclear why there was a

jump in funding from 2008 to 2009. This attempts to address the needs of the districts with the lowest salaries; however, it is a short-term fix and not a permanent solution.

Next, the Findings of Fact addressed the Montana accreditation standards. "In its decision, the Montana Supreme Court noted increasing problems with accreditation standards were evidence of inadequate funding" (*Columbia Falls v. State* – Findings of Fact, 2008, ¶128. 100.). After the funding formula was redeveloped in 2005 and 2007, the majority of school districts were able to comply with accreditation standards and Section 20-9-309, MCA. Sherlock wrote, "The common deviations by schools in advice or deficiency status are non-licensed staff (76 schools) and misassigned teachers (65 schools)" (*Columbia Falls v. State* – Findings of Fact, 2008, ¶131. 103). While the deviations occurred less frequently, Sherlock explained this was still a serious problem for districts because accreditation standards are a minimum expectation. He emphasized that the responsibility falls on the districts that are not meeting the standards, not the state, since a majority of districts of various sizes were meeting accreditation standards. Districts are responsible for deciding how to distribute their funds received under the state formula.

> The availability of additional funding for higher salaries, hiring additional staff, and other district investments suggests that accreditation is not necessarily a resource issue because, if it were, districts would have invested in addressing accreditation before making other investments (*Columbia Falls v. State* – Findings of Fact, 2008, ¶134. 106).

While this may be true, it begs the question of whether the additional funding provided by the new formula (2005, 2007) was enough. One may also wonder, what other

investments school districts were making, which relates to Sherlock's Findings of Fact regarding Cost-Based factors.

In the section titled Cost-Based, Sherlock begins by citing *Columbia Falls Sch. Dist.* (2004/2005), that any school funding systems must be based on educationally relevant factors. He recalls that superintendents testified that the formula was not cost-based at the time, that the formula was not self-sustaining, and that it lacked predictability which led to imbalanced budgets. Then Sherlock adds,

> According to Plaintiffs' expert John Myers, the formula is just as it was before and is not cost-based. According to Myers, the current formula adds money without targeting any specific objective. He found the current funding formula to be political and historical" (*Columbia Falls v. State* – Findings of Fact, 2008, ¶139. 111).

This reinforces perceptions of equality of opportunity (or lack thereof) cited above in the Provision for Teachers when the legislature provided money for the quality educator loan program. Now that the state's perception of an equality of opportunity has been discussed, the data will focus on the teacher perceptions of whether school funding, 10 years later, remains adequate in relation to teacher recruitment and retention in rural school districts.

Teacher Perceptions: "There always seems to be a shortage of money". While the issue of school funding is definitely an economic and political issue, the excerpts of the interviews with participants explained how teachers perceived the values of adequate and equitable school funding. Teachers discuss school funding and personal finances as well as professional capacity building. This connects to the Montana Constitution and how the state provides equality of opportunity for a free, public, quality K–12 education. This

section will also include findings related to teacher induction, mentoring, and professional development (PD) since the opportunities available to teachers vary and since the effectiveness of those programs impacts student educational opportunities. Teacher perceptions vary based on their direct experiences, which shape their beliefs about the places the work.

School Funding and Personal Finances: Unequal Opportunities. All three teachers in Glacier expressed frustration with how school funding was allocated in their district. Mac was especially concerned with unsafe facilities/equipment that was needed to teach required content. Mac initially blamed the school board for not effectively utilizing funds, but also called on the state to distribute more money. Mac also voiced frustration with salaries:

> Why would you pay somebody in a small school less, just because they're in a small school? I don't know how that can be explained…I think that would go a long way to making rural school education better. Just really in the end it's about getting paid. I'll give my time, but at the same time I want to get paid for it (M.R2.00:38:18).

Mac felt that salaries also impacted the quality of teachers one attracts and retains. If rural schools could pay their teachers closer to what a teacher earns in larger Montana towns, it would create competition, which Mac sees as a good thing. However, Mac is realistic that facility improvements and higher salaries are not cheap, and she wishes that her county asked the public for mill levies and bonds to fund their educational needs, but "In Glacier, they won't even ask for one" (M.R2.01:00:21).

In contrast, Jean shared that money is not a huge motivator if she is at the right job, but that workload mattered. Jean felt that her school had to reduce the volume of work, which she described as unsustainable and tied to school funding.

> If we were getting more from the state level, hopefully, that would be allocated so that I'm not my entire department, and so that we're not hiring someone who has a math degree and also having them get a science degree while teaching for the first time. So, yes. I think that if we had more money, that would resolve some issues (J.R2.00:19:35).

Jean added that the district finances were complicated, and that the school district sometimes spent money in a way that did not make sense to her. This also connects back to the CPDA of accreditation and teacher qualifications regulated by the state.

Finally, Pat described how Montana's school funding compares to other rural, western states like Wyoming. When Pat toured high schools in Wyoming, she was impressed by the facilities. Her perception was that the schools were well maintained, including painting, cleaning, changing carpets, with money that came from the state of Wyoming.

> Part of the reason why Wyoming has been so successful is because the state education board took power from the local school districts and said, "No, this is how we're doing it." But it's like carrot and a stick, like, "No, you can't do that, but here's the money to do this successfully."…If the state of Montana could figure out, "Hey, we need to do some restructuring here." Yeah, you're going to piss some people off because, oh my gosh, they're going to have to drive nine more miles to school instead of, you know, but let's consolidate some of these dying schools into one good one, and Wyoming has figured that out (P.R2.00:49:30).

Pat also described how when the state took more control, it consolidated some school districts, which made health care more affordable. According to Pat, the state of Wyoming also contributed more to teacher's retirement plans and their annual salaries.

In Yellowstone, all four participants described the community as generally supportive of funding the school district and that administrators did the best they could with the funding they had. All four participants believed that the state could be distributing more money toward education. All four participants also expressed that it was challenging to live in Yellowstone on a teacher's salary; three out of the four participants work a second or even third job. When asked if teachers in her home state were paid more than Montana teachers, Charlie commented, "Significantly…because I went to school there [East], so I have a lot of friends who are in the same program as me and they're like just living normal-person lives and not working three jobs" (C.R1.01:05:23). The biggest challenge regarding personal finances was finding affordable housing, for teachers as well as other professionals, the working class, and service providers such as firefighters or nurses. While school funding was mostly identified as a state issue, the challenge of affordable housing was recognized as a local issue. All four teachers in Yellowstone discussed the affordable housing shortage and how it was a community issue; one teacher in Glacier discussed this. The lack of support included no cost-of-living adjustment for teacher salaries in Yellowstone and generally noncompetitive, low salaries in Glacier.

One solution the Yellowstone community proposed was "teacherages," a historic term describing housing similar to an orphanage but for teachers, and a solution for housing that is common in reservation communities. The housing gets this name because it is located on school property, and it is a rental property for teachers who may not otherwise have a place to live in the community. At the end of the 2019 school year, Sam

said the Yellowstone school district presented its proposal for their teacherages to the county commissions, and the commissioners were "overwhelmingly in support of it. They were really excited to see this model as maybe something that can happen throughout the state. Because Habitat for Humanity is building it, with the AmeriCorps members" several other community organizations were involved as well (S.R2.00:05:30). When the initiative was approved by the commissioners, the representatives from the Yellowstone schools started clapping. The commissioners were shocked because they had never received applause after passing something, but Yellowstone was so appreciative that they would be able to start building the housing that summer. Sam added:

> If we're looking at quality education…A piece of that is retaining quality teachers to create that quality education…My story was something on the lines of being the most tenured teacher there and I tried to sit down and count all the people who have left, and I got to 30-something, which is almost two per year at least, averaged out. I guess it would be naïve for me to think that they all left because of housing, but many of them, definitely. I would say at least 15 to 20 of them, that was the main reason. So, I think this next step of this teacher housing is a great way to hopefully improve our...retaining our teachers and keeping quality teachers there (S.R2.00.07:10).

Both Alex and Charlie said they already knew three or four teachers who were interested in applying to live in the teacher housing. Alex added, "Hopefully, they're gonna pro rate it based on salary, so it truly will be affordable. Potentially people could work and save, especially young teachers, to buy something" (A.R2.00:06:27). In order to retain teachers for the long-term, Alex felt that it was important to create opportunities for teachers to save and to buy homes. Alex recognized that people would not want to rent forever.

Charlie added that another concern that early career teachers have is paying off student loans. Where someone teaches and the content they teach, can impact the types of loans they can personally apply for, and it can impact the amount of money that may be forgiven. Charlie described feeling nervous because she received alerts that her federal loan had been transferred, yet she continued to pay her monthly balance, intending to pay it off as soon as possible. None of the Yellowstone teachers participated in Montana's loan forgiveness program for teachers; most were unfamiliar with it.

Erin also mentioned the importance of teachers being smart with their finances. She discussed a private school fund where teachers could apply for $5,000 to $15,000 grants to be used toward housing or education. Since the fund had existed for some time, the protocols for grant applications and the amounts available fluctuated. Currently, the fund is depleting, and all the participants anticipated it would dry up soon. Since Erin was a veteran, she had used the fund for education at various times during her tenure in Yellowstone. She reflected, "I hate to say that $12,000 is not much, because it really, that's a lot of money, but if you haven't saved in addition to that it's not going to be what's going to help you buy the house. You need to save, as well" (E.R1.00:25:51). Erin estimated that a family home in Yellowstone was around $500,000. Erin also shared that since teachers had to pay taxes on any money they received from the fund, it made more sense to put the money toward getting a master's degree, which would increase a teacher's annual salary. Next, Erin shared that she encouraged her colleagues to be realistic and to look at the bigger picture.

> We've had several conversations as a staff around this—the reality of the situation, if you are going to teach here, is you have to have a side-hustle. I

> don't know what else to call it. But you need to have other jobs. You're not going to be here, be an educator, and live off of your salary. That's the reality of the situation, right? I told you, this was the only time we could meet, 'cause I tutor after school, and I have another job that I work…I'm fine with that reality. I hope it's not always my reality, but... (E.R1.00:29:43).

Erin reflected on the idea that, while money is critical to survive, "there are a lot of other facets of the job that weigh into your happiness, and you won't have so much of what you have here if you go somewhere else, even if you get paid more" (E.R1.00:29:19). She continued to describe that she probably won't leave Yellowstone for a long time because she appreciates the support she receives from the district—financially and professionally—and she notes that other districts may not have the capacity to invest in their teachers at the level that Yellowstone does. She also recognizes that "probably 90%" of the funds used for her professional development came from school foundation, and how lucky her district was to have that fund (E.R1.00:40:36). Finally, Erin reflected on how Montana distributes their education dollars. She compared Montana to Wyoming, and how from her perspective, the Wyoming government chooses to

> funnel that [oil money] directly into education so that teachers get paid more. Their retirement is more. I've gone to a lot of schools, not a lot but I've probably done like five school visits in the state. Their facilities are beautiful because that's where they're choosing to funnel their money into, and they did that right from the get-go with the oil (E.R1:00:41:33).

In contrast, Erin gave an example of the challenges of Montana's funding formula. This year in Yellowstone, the student population increased, but in some cases, it was not enough to "earn" another teacher, so classes were overcrowded. In the grades where Yellowstone did receive enough funding to hire an extra teacher, this put the new teacher in a situation where they had a job one year, but due to student numbers, not the quality

of their teaching, they may not have a job the next year. Erin shared that she was in that exact position when she was first hired in Yellowstone. She recalled her principal explaining that Erin would not have a job come September because they didn't have the student numbers. It was nothing to do with Erin, Yellowstone just could not afford to keep her. "That piece is hard, where you know you could go to [school] B and your job security might be higher" (E.R1.00:45:54).

Alex added that there were some teaching positions that needed to be created to better meet the needs of students. For example, with Yellowstone's growing enrollment, there is a need for an ELL teacher as well as additional elective teachers.

> We're basically, I'm sure, staffed to capacity what the budget will allow, and we're probably in a much better situation than most places in the state because we have a lot of private support for extracurriculars and things like that. It's like you have to be MacGyver as an administrator to try to fill all the holes, to just get the bases covered (A.R2.00:12:07).

Alex described how colleagues, especially secondary teachers, were feeling burnt out, early career and veteran teachers alike. "So, you've got 150 kids or 200 students. How are you supposed to have relationships with all those people and have four or five preps, and maintain a relationship with your family? You just can't. Something has to give" (A.R2.00:12:41). Expanding from Yellowstone, Alex described the issue of teacher retention and school funding, on a larger scale.

> We spend so much time with other people's children, and people don't value that…It would be great if more people, politicians, came and followed a teacher around a day or a couple of days. Visit some school and just watch. You're not there to speak, you're just there to look and learn and follow an administrator around or a teacher around and really see all of the things people have to do every day and deal with every day. I would love for more people to come into schools and do that. Let's invite the politicians in, let's invite the community in…I just think it's just people [teachers] are really

> undervalued and leaving because they aren't valued but also because they're just burnt out. You can't do it all (A.R2.00:15:47).

Like Alex, Charlie described how the state had to do more so that local districts were not always asking for huge levies, which communities may or may not support. Charlie also identified a need for several more teachers; that sometimes, in a smaller school, the addition of five or 10 students may push a classroom to capacity. This connects to earlier references in the CPDA to ANB, where schools receive money based on their number of students. The state recognizes student enrollment fluctuates, so allows a three-year average; however, increases in enrollment during a school year can lead the challenges Charlie describes.

When asked about school resources for curriculum and instruction, all of the Yellowstone teachers felt that they did have their basic materials as well as some supplemental resources. Sam described some long-term plans to redevelop her curriculum, which would require updated technology, but that she was able to do her job adequately with the current resources. Alex described how she needed new tools for one of her classes, so she approached the Parent-Teacher Organization (PTO). The PTO evaluated the request, what old materials could be salvaged and what needed to be replaced, then provided about $1,800 to buy the new materials. Alex felt very supported by the PTO.

While Alex and Charlie described similar challenges and solutions to school funding and personal finance, they also described more of a systemic problem and how the public was disconnected from the reality of a teacher’s life. Alex described the misguided, good intentions of community members. “I've had parents offer me things and

they think they're giving you a screaming deal and you're just like, there's just a disconnect" (A.R1.00:10:32). For example, one rental property, while discounted, was still not affordable on a Yellowstone teachers' salary. In another situation, a parent offered affordable housing but expected Alex to transport the landlord's children to and from school. Alex now owns a house about an hour away with her partner because she could not find an affordable option in Yellowstone. She did access the private school fund that Erin and Sam both referenced. While Alex is appreciative of that support, she also added, "I think people would argue that it's not necessarily consistently applied or not everybody's aware of it [the private fund]. I mean that was something when I interviewed that they put out there as a carrot" (A.R2.00:07:34). Charlie did not reference this private, school fund at all; she had earned her master's degree prior to teaching in Yellowstone and already owned a house with her partner outside of Yellowstone.

Professional Capacity Building: The Responsibility of Administrators and Systems to Provide Opportunities to Support Teachers. Throughout the interviews, all three participants at the Glacier site discussed how they valued being treated as professionals, meaning that their time and expertise should be respected – something they did not always feel teaching in Glacier. All three teachers voiced frustration that they were expected to do more than was possible during the school day, which affected their quality of instruction. Both Jean and Pat were hired to replace two teachers each due to decreasing enrollment. However, the decline in enrollment is not so great that courses were cut. Instead, Jean and Pat are essentially doing double the work. According to Jean and Pat, most classes are full because, instead of offering two sections of a core class,

only one is offered. In Mac's interview, she discussed how workloads are not distributed fairly at the school site, and specifically mentioned how Jean and Pat have two of the toughest teaching loads, and at least an additional part-time teacher would support each of them in their jobs. Jean and Pat felt that their intense workload was due to student enrollment and the money the district gets from the state, so they did not foresee the district hiring another teacher to support either of their positions.

Another frustration is that Pat was hired in Glacier to replace two teachers that taught different content. Pat is certified to teach in one of the content areas, but not the other, so the district offered to pay for Pat's master's degree in the subject she was not certified to teach in. Pat said that "they're paying everything. They're paying fees, they're paying for the tuition, fees, the books. I just have to do the time and the studying" (P.R1.00:32:34). While Pat is an early-career teacher, she had planned on going back for a master's, "After I finished my [undergraduate] degree, it was always kind of on the table. I thought about it, maybe in a couple of years, and then this opportunity came up, and I was like, If I'm going to do this, I want to make it work for me, and not the other way around" (P.R1.00:33:19). Pat planned on taking three to four years to complete her master's degree, and she chose to pursue the masters over a second bachelors to earn steps on the salary scale. At the end of the school year, Pat shared that it had been a lot to take the masters classes and teach, but she made sure that the district paying for tuition, etc., was included in her next contract. It was not initially included in her contract—Pat described it more as a handshake deal. Pat did appreciate that the district offered the opportunity and followed through on its commitment. However, Pat ultimately decided to

leave the Glacier district at the end of the school year to pursue a different teaching job where she made significantly more money, did not have to take masters classes, and had a more reasonable teaching load. This will be discussed in greater detail later.

All four teachers at the Yellowstone school site feel professionally supported by their administration and fellow teachers, which led to continual learning about innovative pedagogy, and taking more positive risks with instruction. Alex shared examples of how her principal supports her and lets her experiment.

> Tomorrow, I'm taking my ninth graders and we're going across the street and we've been monitoring water quality...Just having the ability to walk over there, like the location, and then the willingness of the administration to sort of support those kinds of things. I've been running like compost with my freshmen, too. That's another thing that I really like about being here is a little bit of freedom in your teaching, and creativity. They're willing to support you even maybe if it doesn't work out (A.R1.00:11:37).

Alex appreciated that the administration encouraged her to take risks in her teaching. She acknowledged that some of the place-based instructional strategies she tried to implement did not always have the outcome she was hoping for. However, Alex viewed all of the experiences as positive since she was learning how to improve instruction, and students had the opportunity to apply academic content to the real world.

Erin commented on the professional discourse she had with her administrators.

> We have way more interaction with administration. I've never had so many professional conversations with my administrators as I have in this building…and that goes back to the relationship piece. Here in this school, not only are the teachers building relationships with the students, teachers are building relationships between other teachers, and we have a relationship with administration. I think it is because we're smaller, and you have the ability to get to know each other (E.R1.00:06:18).

However, even with administrative support, two of the four expressed feeling ‘burnt out’ by the demands of their job. Sam, a veteran teacher shared, “I mean people who don’t teach, no disrespect, but they don’t understand, it’s not just delivering content in an engaging way. It’s also dealing with emotional and social and physical issues that are going on as well” (S.R2.00:14:54). Charlie described her workload as unsustainable: “It’s just an incredible amount of work to do and it’s not something you can break up and make it manageable” (C.R1.00:38:22), unless there are more content teachers, which she recognized was not possible with the current funding. Charlie also commented that she thought the professional capacity of teachers was overloaded at all schools that see large numbers of students, not just her own school. Charlie was teaching about 100 students at the time of the interviews.

Sam spoke a little to the financial support administration provided for teachers to build their professional capacity.

> I really think they [Administration] genuinely do everything in their power to make the best education for our kids, whether that's finding monies, whether that's hiring quality staff, whether that's providing various opportunities for teachers to learn, take classes, go to conferences. I think they do a really good job at that...If you don't feel supported in our district, then you're either really holding onto one thing or you're not advocating for your needs (S.R2.00:24:30).

Sam did discuss, at one point, that elective teachers have a more demanding teaching load as far as the number of students they see and being split across grade levels.

Theme 4: The Ideological Dimension of Place: Aspiring for Quality

> I think probably every public school in every state could use more. It was a whole bigger picture, the value of education and what we promote and say, compared to what governments, meaning our federal or state government, backs up. Always seem to be last on the burner, although they always make up, "Oh yeah, we want to...." It's almost like when there's a presidential run or whatever that, it's always last, but they say it's first. You never see anything different change. And I think we've just become a place where that's okay. We know, everybody knows they're going to say it's important and we want to do all this and then nothing happens…I think it's a cultural problem. It is much deeper than local level, state level. We've created a culture that says, yeah, teachers work their ass off. They don't get paid enough, but then we don't do anything about it.
>
> — Sam, Participant 4, 2019.

Introduction to Theme. Gruenewald (2003a) writes that "spaces and places are expressive of ideologies and relationships of power" (p. 628). This theme shows how power and ideology are present in places, and in how places define education. It also demonstrates that there are important distinctions between quality teachers and HQT's as well as quality curriculum and instruction and the minimal expectations outlined in accreditation standards. I have already identified the contradiction in Montana's Public Education Clause, "The legislature shall provide a basic system of free quality public elementary and secondary schools" (Mont. Const. art. X, § 1). This theme continues to analyze those ideologies, and it also shows how there is sometimes conflict between the ideologies of public policy, teachers, and places, especially as local school districts have the primary responsibility for implementing quality curriculum and instruction. This theme also includes excerpts from the teacher interviews relating to induction, mentoring, and PD. Broadly, the CPDA of the State's education accreditation standards and analysis

of interviews with teachers demonstrate an ideological gap in how various groups in various places view "quality" in terms of teaching and teachers.

Quality Education: What it is–The Accreditation Standards. Fowler's (2013) economic value of quality, where education is seen as a product, was evident in the analysis of Montana policy texts. Quality is also a philosophical or cultural value, where the definition depends on the perspective of the social actor and economic values such as efficiency that may cause conflict. For example, educators generally believe that

> upholding academic standards required up-to-date teaching materials, well-educated teachers, relatively small classes, and much teacher preparation time… Pressures to cut expenditures lead to reduction in all these areas, often causing such increased workloads for teachers and administrators that they change their goal from achieving quality to meeting minimum standards (Fowler, 2013, p. 106).

This same conundrum affects Montana. However, after the 1989, 2004/2005, and 2008 court rulings, the legislature took action toward defining a quality education and funding that school systems based on educationally relevant factors. This led to a version of the current accreditation standards for Montana's quality K–12 education program, which are mandated in 20-7-101, MCA and outlined in the ARM (see Figure 10).

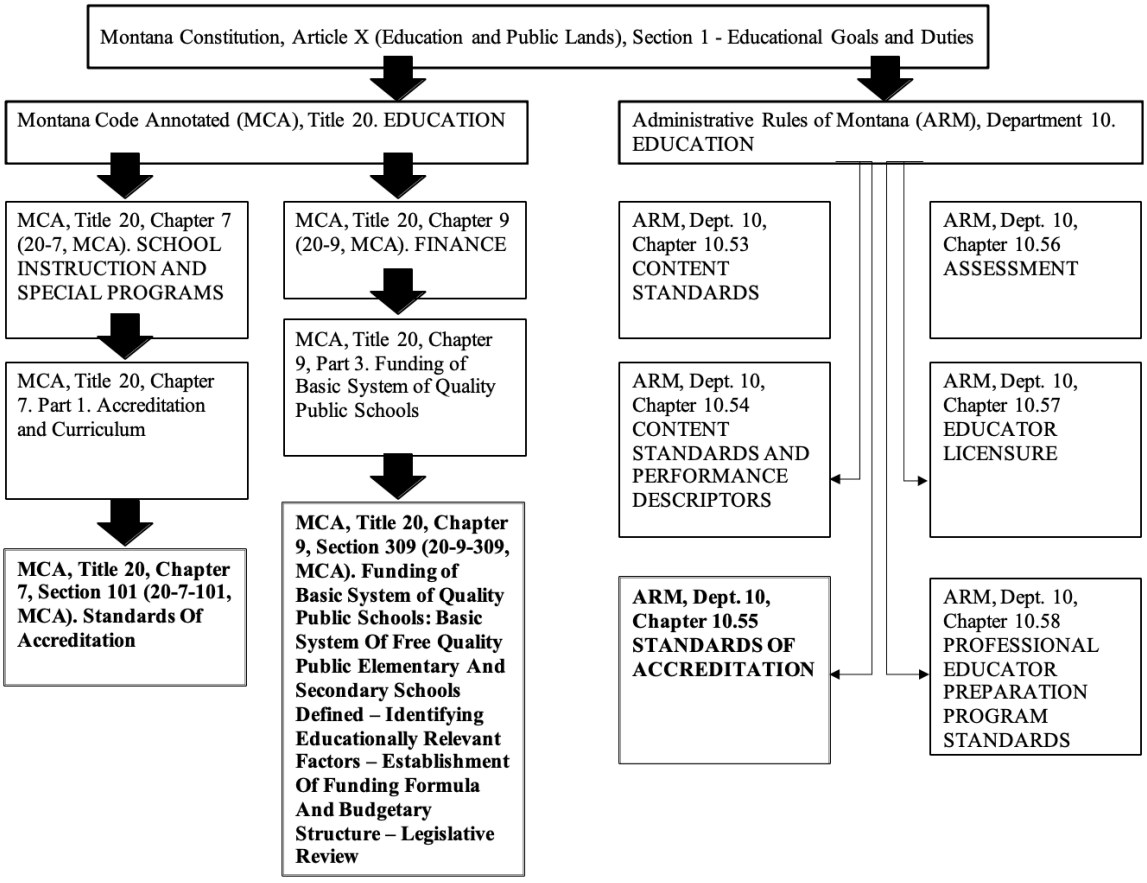


Figure 10. Montana state education policy established in the MCA and ARM

The CPDA is structured differently in this theme because of the purpose of the policy texts relevant to defining quality education. While the court cases determined whether or not the state provided adequate funding to provide for a quality education, the purpose of the selected sections of the MCA and ARM excerpts are procedural; therefore, the CPDA in this section focuses on the organization of the texts and the interdiscursive analysis. There is no argument reconstruction.

The Montana Code Annotated: Accreditation, Curriculum, and School Funding.

Under the MCA, Title 20, Chapter 7, Part 1: Accreditation and Curriculum, there are 20

sections including 20-7-101, Standards of accreditation, which is then broken into five subsections: (1) how standards of accreditation are adopted; (2) that standards are developed through the negotiated rulemaking process, and who should be involved; (3) the process for submitting the economic impact statement[44], of proposed adoptions or amendments; (4) the process for assessing and implementing curricular budget changes in school districts; and (5) standards for school records.

Subsection 2 includes place-conscious language when the text states:

> The [negotiated rulemaking] committee must represent the diverse circumstances of schools of all sizes across the state and must include representatives from the following groups: (a) school district trustees; (b) school administrators; (c) teachers; (d) school business officials; (e) parents; and (f) taxpayers (MCA, §20-7-101).

While the text does not identify rural or non-rural schools specifically, the reference to "diverse circumstances of schools of all sizes" recognizes that there is not an average Montana school and that Montana policy will not be urban-centric as it often is in other states (MCA, §20-7-101). It is also interesting that school district trustees or school board members are the first group listed as needing to be represented on the negotiated rulemaking committee, even though school administrators (listed second) and teachers (listed third) will be the education stakeholders implementing any accreditation and curriculum policies and would be most qualified to evaluate the impacts of policy changes, including changes to the quality of education.

Under MCA, 20-9-309, which focuses on the education funding system, there are five subsections that outline the educationally relevant factors needed to comply with

[44] Included in SB 345 (2015), which revises the process of adoption of accreditation standards.

Article X, section 1, of the Montana Constitution, as well as the responsibilities of the legislature in funding the school system and in "reassessing the state's school funding formula" (MCA, §20-9-309).Of particular interest is subsection (2)(a) through (2)(h), which states:

> As used in this section, a "basic system of free quality public elementary and secondary schools" means: (a) the educational program specified by the accreditation standards provided for in 20-7-111, which represent the minimum standards upon which a basic system of free quality public elementary and secondary schools is built; (b) educational programs to provide for students with special needs…(c) educational program to implement the provisions of Article X, section 1(2) of the Montana constitution…(d) qualified and effective teachers or administrators and qualified staff to implement the programs in subsections (2)(a) through (2)(c); (e) facilities and distance learning technologies associated with meeting the accreditation standards; (f) transportation of students pursuant to Title 20, Chapter 10; (g) a procedure to assess and track student achievement in the programs established pursuant to subsections (2)(a) through (2)(c); (h) and preservation of local control of schools in each district vested in a board of trustees pursuant to Article X, section 8, of the Montana constitution (MCA, §20-9-309).

The standards (2)(a), described as a minimum for a quality education system, are listed first, then various student populations are listed second (2)(b), and the need for qualified and effective teachers is listed fourth (2)(d). The educational standards and curricular programs are centered on the needs of the students, for which the teachers and staff are responsible. It is interesting that (2)(h), "preservation of local control of schools in each district vests in a board of trustees" is part of this definition of a school system (MCA, §20-9-309). The accreditation standards privilege local control ideology that suggests school boards, not teachers, are the most important determiner of quality for schools. This again, relates to critical place-consciousness and the ideological dimension of place – how spaces are a reflection of society.

The Administrative Rules of Montana: School Accreditation, Standards, and Procedures. ARM delegates some responsibility for the accreditation standards to the Board of Public Education and the Superintendent of Public Instruction with the support of the OPI, Montana's department of education. Together, these three entities define the standards of accreditation in chapter 10.55 of ARM, which is located between other education chapters on content standards, performance descriptors, assessment, educational licensure, and professional educator preparation program standards. Chapter 10.55 has 21 subchapters, subchapter six[45] is where the current procedures begin. The Program Area Standards begin in subchapter 10 and continue through 19, then subchapter 20 focuses on School Facilities and Records, and subchapter 21 focuses on the program standards for World Languages. While all of these subchapters describe educationally relevant factors needed to provide a quality education in Montana, this analysis focuses on subchapter 6: General Provisions, 10.55.601 and Curriculum and Assessment, 10.55.603 and excerpts from subchapter 7: School Leadership focusing on School Leadership, 10.55.701; Teacher Involvement, 10.55.706; Teacher and Specialist Licensure, 10.55.707; Teaching Assignments, 10.55.708; and finally, Professional Development, 10.55.714.

After 10.55.601 describes the process of adopting accreditation standards, the subchapter lists what school districts need to include in a continuous school improvement plan (CSIP):

> (i) a school district level education profile;
> (ii) the school district's educational goals pursuant to the requirements of ARM 10.55.701;

[45] The first five subchapters have been repealed as of October 2020.

(iii) a description of planned progress toward implementing all content and program area standards, in accordance with the schedule in ARM 10.55.603;
(iv) a description of strategies for assessing student progress toward meeting all content standards, pursuant to the requirements of ARM 10.55.603 and ARM 10.56.101; and
(v) a professional development component, in accordance with ARM 10.55.714.

The text outlines the CSIP as publicly available and that it will be reviewed annually. All improvement plans are submitted to the local school board as well as the state Superintendent of Public Instruction who is responsible for monitoring the CSIP and "shall provide guidance, resources, and evaluation to assist in the implementation of district and school plans to improve teaching and learning for all students" (ARM, 10.55.601). The idea of continually improving teaching and learning, for all students, is directly tied to education quality and equality of opportunity. Every school district, and its schools, is required through ARM 10.55.601 to engage in this process.

The subchapter Curriculum and Assessment, 10.55.603, continues to describe what the "teaching and learning" ideally looks like in Montana. The very first word in the text is local, which is used to describe school districts. Since all school districts are, in a sense, local—there are no state school districts—it should be assumed that the placement of local is purposeful. It is emphasizing that school boards, districts, and schools have local control over curriculum and assessment in Montana. This is evident in several places where the curriculum is referred to as "local curriculum." This local curriculum must align with state grade level content standards. As noted earlier, even those standards have been designed valuing local autonomy; for example, an economic impact study must occur whenever new standards are proposed. Essentially, school districts need to be

able to afford the implementation of any new standards. If the costs are not feasible then the standards may not pass, regardless of the quality of the new standards. This subchapter states that when school districts develop their curriculum and assessment, there needs to be a process for also tracking student progress, including graduates. In this entire subchapter, there is no direct use of the word "quality"; however, assessing students' progress and modifying curricula to meet CSIP educational goals implies that the quality of instruction shall be reviewed.

Section (4)(a) of this subchapter, 10.55.603, describes which stakeholders should be involved in establishing curriculum and assessment. The text describes it as the "development processes as a cooperative effort of personnel licensed and endorsed in the program area and trustees, administrators, other teachers, students, specialists, parents, community, and, when appropriate, tribal representatives and state resource people" (ARM, 10.55.603). It is practical that teachers are the first group responsible for curriculum, but it is interesting that the trustees or school board, are listed next, before administrators or specialists that are directly involved in a student's education. While the text does not provide rationale for inclusion of the community, that inclusion supports the ideology of local control as important for ensuring quality in rural places. The text continues, describing how a review of district curriculum should happen "at least every five years," or it can align with the state's standards revision schedule. It should also include a reviewing of instructional resources (ARM, 10.55.603). The Superintendent of Public Instruction and the OPI are responsible for helping oversee this entire process.

This connects with ARM 10.55.601 which outlines the expectation for continual improvement coming from the state level.

Next, in the subchapter, School Leadership, 10.55.701, the text describes how the local school board will support the school district in following federal, state, and local regulations. The word local is used again in the first sentence of the subchapter and, in the first instance it is not needed, so it is being used for emphasis. When the levels of government are listed, local is identified first and federal last. In section two of subchapter 10.55.701, there are 19 responsibilities or tasks that the school district must make available to both the staff and public. The first, (a), relates to the CSIP, while (b) and (c) describe expectations for curriculum and assessment. (D) and (e) explain the responsibilities and rights of school leadership as well as students and parents. (F) through (L) list legal, logistical policies such as how to address harassment, academic freedom, or school facilities. One policy that stood out was (g) "an equity policy" that only included that text. It is unclear if equity relates to employment, student access, or funding. (M) focuses on "comprehensive family engagement policy," which has six goals. It is one of two sections that has subsections in this subchapter. For example, goal four states, "(iv) families are empowered to be advocates for their own and other children, to ensure that students are treated equitably and have access to learning opportunities that will support their success" (ARM, 10.55.701).

Vocabulary that stands out are empowered, equitably, learning opportunities, and success. Goals five and six have a similar tone, "families and school staff partner in decisions" and "families and school staff collaborate with members of the community."

Both goals encourage engagement with families. Sections (n) through (s) address a variety of educational topics that are important, but do not directly relate, such as (n) describing how school districts will implement IEFA or Article X, Section 1(2) of the Montana Constitution. Sections (3) and (4) both begin with the "local board of trustees shall," again emphasizing local leadership. Sections (3) and (4) focus on written contracts and policies related to personnel employment and teacher evaluations. Section (5) is of particular interest since it describes how the school board "shall" support schools.

> (5) The local board of trustees shall:
> (a) establish conditions that contribute to a positive school climate which:
> (i) keep parents/guardians up-to-date on students' progress;
> (ii) engage in a continuous school improvement process; and
> (b) establish mentoring and induction programs to assist licensed staff in meeting teaching standards as defined in ARM 10.55.701(4)(a) and (b).

Again, local is used, as is the verb "shall," which is directive, but does not *require* action (i.e., the board should do this, but they do not have to). Point (b) is of particular interest to this study, that school boards shall "establish mentoring and induction programs to assist licensed staff in meeting teaching standards." Licensed staff implies that this could extend beyond traditional educators, perhaps including library media or school counselors, both of which have program area standards under accreditation. This responsibility of providing mentoring and/or induction is a policy that will be further studied throughout the teacher interviews and analysis of legislation.

Chapter 10.55 of the accreditation standards describes Teacher Involvement, 10.55.706; Teacher and Specialist Licensure, 10.55.707; Teaching Assignments, 10.55.708; and finally, Professional Development, 10.55.714. Since these subchapters focus on teachers, they were analyzed collectively in this study. First, subchapter

10.55.706 describes the responsibility and roles of teachers. There are only two sections, but the vocabulary reflects the value, quality.

> (1) Teachers should use their professional judgment to deliver high-quality instruction to all students based on individual need. (2) Teachers shall be involved in curriculum development and student assessments and in the promotion of a school climate that enhances student learning, achievement, and well-being.

In this excerpt, teachers are regarded as professionals. They are responsible for delivering "high-quality instruction to all students," and teachers use their professional judgement to determine what this looks like. Quality instruction also includes aligning curriculum and assessment as well as promoting a healthy school climate. School climate is an interesting word choice because it implies that teachers are part of a larger learning community, beyond the walls of their individual classroom—teachers are expected to be active members. Learning, achievement, and student wellbeing are all effects of a quality school system. The Teacher and Specialist Licensure section, 10.55.707, explains that all teachers and specialists shall be "appropriately licensed and endorsed in accordance with state statutes and Board of Public Education rules" (ARM, 10.55.707).

The subchapter Teaching Assignments, 10.55.708, describes how teachers should teach at the grade level and content area in which they are endorsed and licensed. "Clarifications of teaching assignments in grades 5 through 12 departmentalized settings are published in the Licensure Endorsement Requirements Related to Teaching Assignments" via OPI (ARM, 10.55.708). This section also addresses the amount of time teachers should spend with students, "(5) No teacher shall have more than 28 hours of assigned student responsibility per week except for one-, two-, and three-teacher schools"

(ARM, 10.55.708). The fact that one-, two-, and three-teacher schools are included, may imply that there are a significant number of schools that fall into this category. This reflects place-consciousness and how Montana policy recognizes the unique situation of rural schools and that teachers in rural schools take on additional teaching responsibilities their non-rural peers do not have. This policy also suggests ideologies in terms of quality. If teacher's at "traditional" schools shall not work more than 28 hours directly with students does that mean that smaller schools are expected to work more than that—is there a different expectation of quality or does the policy imply something else about the workload of teachers in small schools?

Finally, 10.55.714, Professional Development (PD), outlines the goals for teachers, the first which aligns with the CSIP, and the second identifies "teachers as central to students learning" who collaborate with "all other members of the school community" (ARM, 10.55.714). It is notable that the legislators added community, yet again, when they could have ended the sentence after school. This reinforces the value of community, or local places, and all of the people that make spaces unique. Sections (1)(d) through (k) provide details about the purpose and process of the PD. For example, (d) states that professional development "respects and nurtures the intellectual and leadership capacity of teachers, principals, and others in the school community" (ARM, 10.55.714). The text also describes PD as "ongoing and sustained," which directly relates to retention of teachers. Sections (1)(i), (j), and (k) relate to the notion of quality PD and require that an outcome of the PD directly relates to teachers and student learning.

Through the analysis of education text in MCA and ARM, it is evident that policymakers focus on identifying the basic or minimum requirements, defined as the accreditation standards, to provide a quality education that includes equality of opportunity. While the contradiction of "basic" requirements for a "quality" education persists, Montana recognizes the complexity of setting requirements is due to the state's rurality. The state does not want to require something that rural schools will not be able to provide due to their geography. When defining a quality education, both MCA and ARM emphasize local control, which is directly included in the text. Often, local trustees or members of the school board are listed as the first entity involved in curricular decisions or school district finances, while teachers are positioned as less important.

Teacher Perceptions: "Every time you recruit a new teacher it costs thousands of dollars…You have to start over from square one." To provide a quality education to students, teachers recognize a significant time investment is necessary. All three teachers described a quality education as one that meets students where they are and supports them to succeed in their world, whether that is college-bound or working on a ranch. Mac explained,

> I would define a quality education as one that makes a person happy to be learning new things. There's always stimulation to progress in learning and then, with that, in turn the quality education provides a person with an understanding of their world and an ability to succeed in their world (M.R2.00:22:18).

Jean described a quality education as "approaching it holistically…differentiating for specific students and making education more individualized, or as individualized as possible" (J.R2.00:14:31). Jean added that the smaller student population at her school

allowed teachers to form closer relationships with students. Finally, Pat explained that a quality education was, “preparing them [students] for the next step, that they go into with some confidence, with some skills, with knowing what kind of students they are, how they learn. That’s a quality education. It’s less about the content, more about their growth and understanding” (P.R2.00:36:25). All three teachers stressed that they wanted students to be able to apply what they learned in the classroom to the real world.

Concerning what needs to be improved for Glacier to ensure it is providing a quality education, the participants described retaining teachers and the school board establishing consistent policies that support their teachers. For example, Mac recognized that Glacier is trying to hire quality teachers:

> They are, they're trying to do that and they're also trying to do that without spending any money. They know the difference between a teacher that has the drive to be the teacher and the teacher that is just there. The school wants, they do want, teachers with energy and a desire to teach their kids, they do want that. However, they don't know how to keep them, and foster their drive (M.R2.00:24:15).

As an early career teacher, Jean spoke to Glacier’s challenge of keeping teachers, “... I think that the level of overwhelm and the expectation of the amount of work that has to be done needs to be reevaluated…I find myself regularly working 12-hour days, and I think it quickly leads to burnout” (J.R2.00:18:19). Jean recognized that solving that problem is challenging but suggested that teachers with full course-loads be offered a second period to prepare or that they could be assigned a study hall, which would give the teacher time to grade or plan while supervising the students. Jean thought she was one of the only teachers at her school who did not have a study hall; instead, she was spending substantial time outside of school to plan because every course she taught was

content-specific. Finally, Jean expressed that, in the advanced classes, she sometimes felt like she was teaching to the test, which was frustrating. Overall, Jean was overwhelmed by her teaching course load, having to "teach to the test" in her advanced classes, and not having enough time to plan the high quality instruction she wanted—leading to burnout.

When teachers in Yellowstone were asked how they would define a quality education, several themes emerged. All four participants described a quality education as being student-centered and about more than academics. For example, students need to feel safe in their environment, students and teachers need to establish a positive relationship, and learning should be holistic to include social-emotional health and physical health. Sam added that teachers need to show students how to use the technology that is at their fingertips.

> You have to have a fine line between what you hold back and how you teach them to use a tool, like you would teach someone a chainsaw or a kitchen knife. Or if you were a hunter, a rifle. Yes, the [new technology] can be dangerous, but you teach them with respect and responsibility because, like Superman or Spider-Man says, "With great power comes great responsibility." So, [quality education includes] offering a safe place, allow mistakes, not holding back on resources and leveling the learning field, to take that cliché (S.R2.00:17:05).

In addition to the technological or physical tools that students use in a classroom, Erin described how it is important to identify what unique characteristics students bring to the classroom. Erin reflects that quality education includes an asset-based approach.

> I think trying to identify in students what their strengths are and building on that…sometimes we get a lot of focus on this child isn't able to perform, or what are the deficits and how do we make up for those deficits instead of finding strengths and trying to build on those. I think that's another transformational shift. Not to say that you don't work on those areas that need development, but I think you start from a lot better place if you build on strength rather than deficits (E.R2.00:01:59).

Erin went on to describe how a quality education is more than just students and teachers, administrators need to treat their teachers as professionals and provide leeway in making decisions for their students. In Yellowstone, Erin feels that teachers have a lot of flexibility in how they teach their curriculum and that administrators give teachers ownership of their classroom. Having taught in a larger district, Erin recognizes that her smaller district does not have some of the challenges that come with keeping a hundred teachers aligned. Instead of worrying about teaching a regimented curriculum, Yellowstone encourages teachers to authentically collaborate.

> There's a ton of collaboration that happens between teachers. We have open doors, we're always in and out of each other's classrooms asking questions or, you know, bouncing ideas off of each other or this didn't go well, do you have any recommendations? Those kinds of professional conversations, we are having all the time. I think just kind of building a culture where we don't have all the answers, and we're not supposed to have all the answers. We need to work together and that's kind of the point of education…These children have amazing capabilities and trying to figure out how to develop those and be part of the learning process rather than the givers of information (E.R2.00:04:25).

Alex also taught in other school districts before coming to Yellowstone and agrees with Erin that "small school districts are really sort of uniquely placed to do this [provide quality education] in a lot of ways, and that's because we're really able to build relationships with kids and their families" (A.R2.00:03:27). Finally, Charlie comments:

> There's so many different aspects of education, but I think, overall, something that would make any type of education good is that the student is learning the skills and the knowledge that they need to go beyond where they currently are, and to do it with process. So, like building up some kind of, you know, holistic education into it so students have a chance to learn about themselves and learn about why they're doing what they're doing. The purpose behind it…But also building, you know, personal confidence and finding some kind of meaning in what they're doing (C.R2.00:10:30).

When talking about what needs to happen in Yellowstone to improve the quality of education, two teachers explicitly said that teacher attrition impacts the quality of education and the school culture. All of the teachers believed that Yellowstone could use more support from the state in providing a quality education. Sam reflected:

> I think probably every public school in every state could use more. It was a whole bigger picture, the value of education and what we promote and say, compared to what governments, meaning our federal or state government backs up. Always seem to be last on the burner, although they always make up, "Oh yeah, we want to..." It's almost like when there's a presidential run or whatever that, it's always last, but they say it's first. You never see anything different change. And I think we've just become a place where that's okay. We know, everybody knows they're going to say it's important and we want to do all this and then nothing happens… I think it's a cultural problem. It is much deeper than local level, state level. We've created a culture that says, yeah, teachers work their ass off. They don't get paid enough, but then we don't do anything about it. (S.R2.00:34:30)

Erin and Alex also talked about the systemic nature of the problem, but they focused on how teacher attrition in their district affects the quality of education students receive.

> You know every time you recruit a new teacher it costs thousands of dollars, and that money could be used in different ways had you not had to go through the hiring process…then you lose the training that you've put into the teacher who has been in the district. This district really values that kind of professional discourse and pushes teachers to be continual learners, so we don't get stagnant. That's really hard when a district has invested that amount of time and money in a person and then they leave and they take that expertise and the knowledge and, you know and they go to a different school and you have to start over from square one (E.R2.00:07:12).

Alex discussed how the new district curricular program will hopefully help when hiring teachers since the program is taught in other schools across the world. “I think part of the goal of going [with the new program] has been to have a consistent curriculum, so that, if people do leave you just hire somebody else who's taught the [program] class before” (A.R2.00:19:12). If Yellowstone could not stop teachers from leaving, at least school

leaders could create a smoother transition, so that teacher attrition does not negatively impact the quality of students' education. Erin shared

> This district really values that kind of professional discourse and pushes teachers to be continual learners, so we don't get stagnant. That's really hard when a district has invested that amount of time and money in a person and then they leave and they take that expertise and the knowledge and, you know, and they go to a different school and you have to start over from square one (E.R1.00:7:30).

This is an example of how the Yellowstone school district is taking responsibility for the quality of education, and how the school community may view teachers who leave as not following through on their responsibility, or that perhaps the state legislature needs to provide more funding to fulfill their responsibility of retaining teachers. Erin went on to discuss how teachers who did stay had amazing opportunities for professional development or professional capacity building:

> For a small school district, this district really puts high value on educators continuing to learn, to better themselves, and the last two principals that I've worked under…They always wanted you to better yourself and figure out how you could grow. They would push you to be involved in committees and there's probably over a dozen committees that I'm involved in that really give you a hand in what is happening in the school, and kind of driving change and looking at how that's going to happen in the school (E.R1.00:13:15).

This shows how the district is taking their responsibility of professional capacity building seriously and how there is an amplified responsibility for teachers in rural contexts. Erin's involvement with the dozen committees implies that she simultaneously benefits from her school culture and is influencing the school culture.

Not all of the teachers viewed the new curriculum as a positive. Both Sam and Charlie voiced skepticism. Was the new program that much better? How is it impacting

students? Charlie reflected on the new program, “I think, on the positive side, they really are trying their best to give kids a really robust education…They really do care about the education component and not just like getting kids through” (C.R2.00:11:30). Then Charlie described what she views as the downside:

> Since it is so rigorous, we've left some of the student’s kind of in a gray area where they're not quite able to benefit from that type of rigorous program. They're not really being met where they are, so it's hard for them to get that information to go to their next step, 'cause their next step is maybe different than the target. Yeah, so I think that that's definitely a downside, is that they are pushing so hard, which I think is good, but then kind of leaving some kids out…which I think is bad (C.R2.00:12:05).

Finally, when Charlie was asked about how teacher attrition impacts education, she shared that transitioning between teachers is difficult. Charlie felt confident that the most recent hires were strong teachers and knowledgeable in their content area but also recognized that may not always be the case.

> Turnover is still a problem even when you have a qualified teacher who is very dedicated for a year because the district invests in them, and it is hard to transition to a new teacher, or there’s the possibility that the next new hire may not have the depth of content knowledge required to teach the curriculum created by the previous teacher (C.R2.01:00:09).

Induction and mentoring programs, as well as PD, are ways the state and school districts support teachers transitioning to a new position or teachers wanting to improve their curriculum and instruction.

Induction, Mentoring, and Professional Development: An Effort (or not) To Provide Opportunities for Teacher Growth. Induction, mentoring, and professional development can be ways local schools enhance teacher quality and ensure continuous improvement. None of the teachers in Glacier recalled an induction program; however,

mentoring programs existed during various times in different capacities. Regarding mentoring, Jean found it very valuable. Having a mentor that taught the same content for student teaching was very helpful because she was figuring out how to address a variety of content. However, once she had her own classroom, Jean appreciated having a mentor that did not teach in her content area because she felt like she had more freedom and was not being judged. Jean felt, if that mentor had taught the same content, she may have felt conscious or unconscious pressure to adapt their teaching style, etc. Jean described her mentoring as formal. Her mentor had gone to training and checked in with Jean at least once a week, although she never turned in any assignments or feedback to anyone. Jean described her mentor,

> She was almost like a school mom. Having that, just a support system, someone that I knew I could trust and depend on and go to if I was struggling…I think it definitely helped me feel more comfortable…I think it matters more that the personality meshes, regardless of the content area. That is more valuable (J.R2.00:25:39).

Most of the check-ins were short, 15–20 minutes, focused on classroom management questions or logistical issues like planning field trips or ordering classroom supplies. Jean writes that her mentor "tailored it to better fit our relationship and what I needed specifically because I was strong in some areas, and I needed help in other areas" (J.R2.00:24:35). Jean shared that her mentor did watch her teach several times, and she provided some feedback. Jean also shared that she invited other teachers to observe or even join certain lesson activities—she liked having an open door. While the mentoring was valuable to Jean, that was not a key factor in why she stayed in Glacier for three years. Rather, the relationships she formed with several colleagues provided the vital

social-emotional support, and Jean was sad to leave those colleagues who were also friends when she resigned. Content-wise, Jean maintained support through social media including a Facebook Group for AP teachers that linked resources, including entire lesson plans, which was essential to Jean's instructional planning over her first two years.

Mac and Pat found the mentoring less helpful because of the lack of consistent training and organization, but they did agree that it was a worthy district initiative. Mac mentioned the training that Jean's mentor attended, and that she was frustrated that she was not able to attend because it had been over the summer when Mac was busy with her seasonal job. Mac shared, "It would be better if it [mentor training] was made available to all the teachers through the district" (M.R2.00:54:26). Mac never received formal mentoring herself and, as a mentor, expressed discomfort being responsible for providing too much feedback or coaching to mentees. For example, the first teacher she mentored was not certified, so the mentee was "learning how to teach on the fly," and Mac felt this teacher needed more help than was her responsibility (M.R2.00:50:16). During the current school year, Mac was mentoring a different early career teacher and felt that relationship was very positive for both of them. The early career teacher had expressed feeling supported, and Mac enjoyed learning about innovative instructional methods from the mentee as well as the discussions they had around content and assessment. Mac reflected that she would have appreciated having a mentor as a first-year teacher, especially since many of her content areas are "one person departments."

> You don't have a colleague teaching the same thing that you can discuss lessons and ideas with, so we missed out on that, being a small school. Through the mentor program you can get that communication. I know that

> this teacher I've been mentoring this year, we've had some great discussions which has been really refreshing (M.R2:00:51:53).

The opportunities for collaboration were seen as valuable, even essential.

Pat had a mentor at the school, who she described as helpful with logistics; however, they taught different content areas/courses, so coaching related to curriculum and instruction was limited. Pat appreciated the opportunities for PD the district had provided, especially through the OPI. For example, her content area had relatively new national content area standards, so Pat attended an OPI sponsored training on how to implement the standards. PD has the potential to close the ideological gap between communities and the State in terms of quality. Pat also mentioned monthly district in-service days, which she felt were a little too generic or "too watered down" (P.R1.00:37:59). As an early career teacher, Pat expressed wanting PD that was directly relevant to what she was doing in the classroom. When Pat described her new job, one of the positives was that the school population was larger, so there were departments for the various content areas. There were also three days of induction for teachers new to the district before school started. Pat was not sure if there was a formal mentoring program at her new school, but she was confident she would be able to seek out support through the content department since she was already emailing with that teacher.

Finally, Jean described how much of the PD at Glacier happened through committees and that this was challenging.

> I think in terms of proving myself…personality-wise, I think that, because I was seen as someone who understands the way of life in Glacier, that made me fit in easily. But, professionally, I think that was a huge struggle. I definitely felt targeted…there are four or five out of our staff of maybe 13, that are incredibly toxic to be around. And they're very stuck. No, I don't

> want to say stuck. They are established teachers, and they have a set way of doing things. I don't want to put words in their mouth or assume anything, but I think any new ideas that are brought up, or even changes in routine or the way that you do things, things like that, were seen almost as an affront to their way of teaching (J.R1.00:12:46).

This is an example of how continuous professional growth is expected for improvement of instructional quality, but change is not always welcomed in small communities and schools. Jean added that when veteran teachers such as Mac, presented to the staff, even if she presented one of Jean's initiatives, the reception was very different than if Jean had said it. When asked if seniority made a difference—that Mac had been in the district for over nine years while Jean was an early career teacher—Jean said, "Yeah. Absolutely" (J.R1.00:13:54). Later Jean added that she is on a committee, and when she is asked to present, "I'm doing a lot of the work, but I do not present it because if it comes from someone whose been here longer, the reception is very different… If it comes from me, I get lit on fire… I want to be doing more, but I feel very limited in how effective I can be" (J.R1.00:14:53). All three teachers discussed the various professional learning communities that were organized by administrators, which met once or twice over a month. They appreciated that the district was trying to create opportunities for collaboration since the teachers were otherwise isolated. This also implies that Jean's experience is especially problematic. While her situation could happen in a non-rural school, the social isolation in a rural school makes authentic, positive, collaboration among the smaller staff even more essential. Committees focusing on instructional best practices or technology gave the teachers an opportunity to develop relationships with teachers who did have similar interests. Even though they taught different content, many

were teaching the same students. Each of the three Glacier teachers also expressed that she had at least one, if not more, supportive relationship at her school.

In Yellowstone, none of the participants participated in an orientation or induction program when they were hired. Sam shared that an orientation has been discussed multiple times, but never seemed to get off the ground. She discussed how when she moved grade levels in the district, it would have been nice to have some guidance—for policies, forms, etc.—because she felt like a new teacher. Alex mentioned that some members of the local teachers' union had discussed creating an event or program to welcome to new teachers, but this was not implemented yet. Charlie mentioned that she was hired during an administrative transition, so that may have been a reason why there was no induction or orientation program for new teachers when she joined the staff.

All four of the participants recognized the value of mentoring, although they stressed that authentic or informal mentoring was more useful than assigned mentoring partnerships with formal protocols. Informal mentoring seems to align more with local ideology, while more formal programs are expected by the State. For example, Sam shared that she was sent to a formal mentoring training, with another teacher, and Sam brought what they learned at the training back to Yellowstone. However, the program they were trained in never grew into a district initiative, which implies that the ideology of the State did not align with the realities of the local school district. In all of her years at Yellowstone, Sam was assigned a mentee only once, and the mentee became pregnant at the very beginning of the year. Once that happened, the mentee shared that she planned to leave Yellowstone after having the baby, so the mentoring relationship never developed.

Sam also recognized that her limited experience with mentoring made it so that she did not have a clear vision of mentoring.

Erin had more experience with mentoring since she taught in other schools before coming to Yellowstone. Erin had had formal mentoring in one district where she was the mentee, which she described as not very effective. Instead, Erin recognized that the personal relationships she had naturally formed at their schools ended up having more of an impact on her teaching.

> I just read something about mentoring, and it was talking about the importance of, or how mentor relationships can naturally occur. How you're drawn to somebody and you create a relationship, and what can come out of that versus an assignment, and you have to do this, and then you tick off these boxes. To me that made much more sense because, as I reflect on my career in teaching, I've had different, like when I was overseas, I definitely had somebody that I viewed as a mentor, and I would go to her, we had a relationship. I valued who she was as an educator, and what she did in her classroom, and she mentored me, and it helped me. She didn't get paid and it wasn't formal, but it impacted me and who I am in the classroom to a huge degree. So I think it's really hard, it kind of goes back to what we were talking about in the classroom where teachers need the ability to have leeway to create and to design, and have a platform to work with, but have some ownership in what's happening (E.R1.00:18:53).

This is representative of the ideology of local control as related to quality, however it is contingent upon teacher agency and autonomy. In Yellowstone, Erin has served as a formal mentor. While her experience was more productive than Sam's, Erin shared that:

> I think it's hard to have a scripted mentor program because that relationship piece I think is really, really critical. So anyways, back to the current district, we did try a mentoring program. We've tried it a couple different times with a couple different administrators, but it went back to, here's what you need to tick off. Meet quarterly, and talk about this, before report cards talk about this. I think the things that we talked about, and I was a mentor in that, like I was in a mentor role and had a mentee. The things that we talked about were important, but not anything transformational for the teacher in the classroom (E.R1.00:19:48).

Alex's description of mentoring in Yellowstone aligned with Erin's. Alex described mentoring contracts and her involvement as a mentor, but that the accountability was pretty loose. Every mentor-mentee relationship was different because "nobody really knows if you're doing what you're supposed to do" (A.R1.00:30:58). Alex also expressed a desire for training in mentoring or leadership so mentors could help with lesson planning or looking at assessments. Currently, the mentoring was more of a check-in; Alex had received no training. Alex had offered to come watch her mentee teach, but the mentee did not want that even though Alex thought it would have been valuable. Of the three teachers that Alex mentored, informally and formally, two are returning. "I think, definitely, mentoring is huge to keep people in the game and let them know 'You're not totally alone and we're here to support you'" (A.R2.00:24:09).

Charlie provided an alternative perspective. She did not think that a mentoring or induction program would have been especially helpful to them because she already knew the teachers on a personal level. She felt confident in asking for help with instruction or seeking support for computer programs (for grading, etc.). "I think for other people, it's definitely a helpful thing to have. I'm sure it wouldn't have hurt me in any way to have a formal mentor" (C.R1.00:17:30). Charlie did not feel it was necessary since she took initiative to address curricular challenges and implement school policies.

All of the participants recognized the valuable PD that Yellowstone provided, specifically, the in-house opportunities to plan instruction with other teachers. "I'd say professional development has been huge," Sam reflected (S.R2.00:42:54). Overall, teachers were able to attend trainings and conferences that they wanted to; administration

seemed to reserve funds to support teacher learning. Erin agreed with Sam, “for a small school district, this district really puts high value on educators continuing to learn, to better themselves. The last two principals that I've worked under, really both were proponents of building the capacity of the teachers” (E.R1.00:12:40). Erin recognized that administration provided PD for the new curricular program the district was implementing; they supported state PD provided by OPI, and administration provided time for teachers to collaborate with other teachers, especially at the elementary level. For example, Erin explained, “We have Wednesday meetings, Wednesday staff meetings, and at a lot of those, we bring what we see in teachers' classrooms, and they share what they're doing in their classroom. That's one small piece of that…” (E.R1.00:16:13). In October, during days allotted for state PD, Yellowstone also hosts their own conference at their school where teachers share their skills and best teaching practices. Charlie also mentioned the in-house PD, but she described the content-specific PD that the administration paid for as being most beneficial.

Alex also described how the school was in the process of developing a more rigorous curriculum across all grade levels and content areas or disciplines, and how the school district provided training to develop the new curriculum. Some staff and student families questioned the value of the new program, and Alex felt that there was “a bit of a clash between the town mentality” and the academic expectations of the curriculum (A.R1.00.01:41). For example, the new curriculum developed by Yellowstone teachers was reviewed by outside consultants who determined whether or not the school met the criteria of the program—not the local school board or anyone in the district. If the

Yellowstone curriculum was approved by the "parent program," then during the school year, students submitted portfolios of work to this outside organization. Prior to this program, teachers had developed curriculum based on the state standards, and the curricular program had been approved by the local school board—a traditional process for developing and integrating public school curriculum.

Teachers described the challenges of developing new curriculum, including not enough time or resources. One teacher shared that it was also a bit of a challenge to get all of the teachers and students' families on board,

> I think the school used to be a lot more just kind of loosey goosey, freewheel. Not that it was bad, but it was a little bit more ... There weren't necessarily like rigorous expectations across the board…I think that's a big culture shift in the academics of this school (_[46].R1.00:14:28).

The shift in academic culture is especially challenging when teachers do not stay in the district.

Three out of the four Yellowstone teachers expressed skepticism toward the new "rigorous" program that was being implemented in the secondary and elementary schools, which curated its own PD. One teacher described how she may not want her own child to participate in the new program because it seemed to focus on coverage of content instead of engaged learning, and students were getting too stressed out.

> There's been a little bit of weirdness about, if you don't do this program, you're not going to go to a good school, and that's complete bullshit because it's not true. We have been sending kids to good schools before this program. Has it [the new program] increased the quality of schools? Maybe. I don't know. Possibly. But it's a really hard thing for two years. The kids are really stressed out. It's really a huge workload and I feel like that sometimes takes

[46] The pseudonym is not being shared in order to add another layer of anonymity in this instance.

> away from, are we making this meaningful? Is it important? I don't know (_.[47]R2.49.30).

She also added that the new curriculum was overwhelming and frustrating to some teachers, "I don't know if that's how education should be…" (_.[48]R2.00:49:50). Another teacher even described the new program as a "pyramid scheme" since new curriculum and assessments were released every couple of years, which then required schools and teachers to pay to get retrained (_.[49]R1.00:52:32).

Theme 5: The Ecological Dimension of Place: Engaging in Systems of Power

> I mean, if it comes down to it, and not exaggerating at all, I will probably have about a thousand dollar a month pay raise. That's life-changing for me. I'm single. It's just me. It's not like mine is a supplementary income; I have to live on what I make, and this move allows me to breathe…So, my total package with pretty much my salary, teacher retirement, they pay for my health insurance, $74,000 a year.
>
> — Pat, Participant 3, 2019

Introduction to Theme. The findings that align with theme five, the ecological dimension of place and power, explore how power and systems manifest in places. The theme includes CPDA of legislative summaries from 2007 through 2019, focusing on teacher recruitment and retention, and analyzed in a similar way to the MCA and ARM in theme four. This theme includes excerpts from the teacher interviews where participants discuss systemic influences on teaching as well as how larger systems shape places and the interactions of people within those places. Subthemes will explore why

[47] The pseudonym is not being shared in order to add another layer of anonymity in this instance.
[48] The pseudonym is not being shared in order to add another layer of anonymity in this instance.
[49] The pseudonym is not being shared in order to add another layer of anonymity in this instance.

educators in Glacier and Yellowstone stay or leave and whether Montana education policies have affected their decisions. Finally, Gruenwald connects the ecological dimension of place with socially constructed systems of oppression, and historical patterns of control over marginalized groups, such as women. Education remains a female-dominated profession, and several participants discussed issues such as underfunding schools or overburdening teachers as systemic problems.

Who has the Power? State Policy Addressing Teacher Recruitment and Retention from 2005–2019. After the Special Legislative Session in December 2005, the legislature met in 2007 and passed SB 2 (2007) and HB l63 (2007) to address teacher recruitment and retention as well as quality education in general. SB 2 increased "the basic and per-ANB entitlements by 2.76% in FY 2008, and by 3% in FY 2009," which is deposited in each district's general fund. It is unclear if the increase matches inflation or if the increase occurred for other reasons (Montana Legislative Summary, 2007, p. 31). SB 2 also created the Quality Educator Loan Assistance program, which has been revised multiple times since then. In the program overview, it is interesting that the value, "quality," is used to describe the educators, since there is no metric to determine the quality of the teacher's instruction. Rather, teachers become eligible for the loan program if they are employed in the K–12 public school system, and if they are "teaching in a school and subject area that is impacted by critical quality educator shortages as recommended by OPI" (Montana Legislative Summary, 2007, p. 32–33). However, there is still no connection to quality other than in name and marketing. On one hand, it is positive that the legislators are equating educators with quality. On the other hand, it

seems disingenuous since the legislators use the value, quality, in the name of their program—the state has to advertise, 'These are not your average teachers, these are quality teachers'—while also providing no accountability for the level of quality, which implies that the quality is actually meaningless.

Regarding the details of the policy itself, it is unclear how the costs of loan forgiveness were determined, why it was only for four years, and what happens if a teacher's responsibilities change from year to year (i.e., perhaps they teach in a content area that qualifies, and then they do not…). In 2005 and 2007, separate bills were proposed for educator loan forgiveness programs, but both failed; so, it appears that is why the program was added to SB 2.

HB 163 (2007) revises the Teacher Retirement System (TRS) to reflect the actuarial funding method and it increases the state contributions to the TRS for both K–12 and university faculty. This is significant since benefits, including retirement, are an incentive for recruiting and retaining teachers. Bills that failed in 2007 include a state health insurance option for K–12 teachers (HB 297, HB 124 was proposed in 2005 and had also failed) and an alternative teacher certification (HB 230). The health insurance option may have created more equity for teachers, and perhaps, more competitive health insurance plans. The alternative teacher certificate may have helped recruit non-traditional teachers who had content knowledge but not curriculum and instruction training. Hard-to-staff schools may have benefited from this policy in that they had an adult with content area expertise who wanted to be in the classroom. However, due to lack of training, the alternative licensed teacher may not initially have the pedagogical

training to develop effective curriculum and instruction. In the 2007 Legislative Summary, there was a section for Teacher Recruitment and Retention, which implies that the topic was of interest. This continues in 2009 but is absent through 2017. In the 2019 Legislative Summary there is a section titled, Teachers, that does not include any other description.

In 2009, there were additions to HB 2 under the OPI Operations and Technical Assistance to Schools, to include Stipends for National Board Certification. The OPI had budgeted $12,000 in stipends "for teachers who achieve certification from the National Board for Professional Teaching Standards" (Montana Legislative Summary, 2009, p. 8). HB 2 (2009) appropriated an additional $21,000 annually to support this program, which came from the Board of Public Education's research fund and the Montana Rural Physicians Incentive Program[50]. HB 363 (2009) established a policy to "use retired teachers/administrators to fill vacancies without applicants" for a maximum of three years (Montana Legislative Summary, 2009, p. 23). It is notable that this passed in 2009 while the alternative licensure proposal had failed in 2007. Perhaps the state was concerned that alternatively licensed teachers may not be effective educators, while retired teachers usually have proven their mastery and often their commitment to a community. In 2009, the Quality Educator Loan Assistance Program continued. There were not adjustments to appropriations, but HB 46 (2009) amended an educator's eligibility to "be determined based on the educator's teaching assignments as reported… for the current school year rather than the previous school year" (Montana Legislative

[50] As of 2020, the Montana Rural Physician Incentive Program allowed a maximum of $150,000 in loan repayment over five years for full-time physicians participating in the program (MUS, 2020).

Summary, 2009, p. 52). No significant legislation was introduced in 2011 addressing teacher recruitment and retention.

In 2013, HB 2 increased appropriations by $27,000 for FY14 and $57,000 for FY15 for stipends to support National Board Certified Teachers (Montana Legislative Summary, 2013, p. 8). This was included as part of OPI's Operations and Technical Assistance to Schools. SB 175 (2013) also generally revised public education funding to adjust "through inflationary increases in the per-ANB entitlements, a redesign of the basic entitlement, and a new Data for Achievement payment, and a new natural resource development K-12 funding payment" (Montana Legislative Summary, 2013, p. 36). Toward the end of the summary, the legislature claimed that

> The increased funding for the school district general fund budgets, beyond inflation, provides schools with resources to implement the changes to the state accreditation standards adopted by the [Board of Public Education] BPE during fiscal years 2012 and 2013 and to continue to enhance efforts at improving academic achievement for students (Montana Legislative Summary, 2013, p. 42).

In 2015, there was no adjustment for the National Board Certified Teacher stipend in HB 2. SB 141 (2015) allowed retired teachers to continue filling vacant teaching positions "without being subject to the standard limitations on compensation" (Montana Legislative Summary, 2015, p. 15). This implies that recruitment and retention continued to be an issue for certain school districts. SB 331 (2015) would have allowed "School District trustees to temporarily employ certain qualified individuals without satisfying a traditional pathway to licensure," essentially an alternative licensure. This also implies that there was a need for teachers in certain content areas and schools, and this reinforces the value of local control since the legislature gave the power of employing

nontraditional teachers to school boards. Finally, SB 128 (2015) established a SFIC "to reassess the educational needs and costs related to the basic system…if necessary, recommend to the following legislature changes to the state's funding formula" (Montana Legislative Summary, 2015, p. 25). This commission was required to meet at least every 10 years. Since this was originally suggested in 2005, the 2015 legislature organized a SFIC that did meet from 2015–2016 and published a report in September 2016.

The SFIC K–12 school funding report identified teacher recruitment and retention as the number one issue that needed to be addressed. The commission had four recommendations to address recruitment and retention: to revise the Quality Educator Loan Assistance Program, to develop quality induction programs for teachers and administrators; that university teacher preparation programs should provide opportunities for rural pre-service experiences; that universities should expand teacher preparation programs "that benefit recruitment in rural Montana as well as through online programs in order to reach potential teaching candidates more likely to teach in rural schools" (SFIC, 2016, p. 24). The other education issues that the SFIC addressed were school facilities; special education and special needs; district size, structure, and equity; and K–12 employee health benefits. Originally, health benefits were included under teacher recruitment and retention, but the SFIC recognized the complexity of both issues, so it studied them separately and ended up recommending another task force study health benefits during the 2017–2018 interim.

During the 2017 legislature, only two bills addressed teacher recruitment and retention. SB 119 (2017) revised the Quality Educator Loan Assistance program to focus

on schools impacted by the critical quality educator shortages, which OPI reports on annually. The bill also addressed rurality, describing it as "schools that are more than 45 minutes from a city with a population greater than 10,000 or more than 30 minutes from a city with a population greater than 4,300" (Montana Legislative Summary, 2017, p. 29). These changes were made because the Census Bureau's definition of rural caused complications for Montana when trying to distribute funds appropriately to schools. The legislature found that sometimes the schools they were targeting for funds did not qualify under the Census Bureau definition, so the legislature created their own definition for purposes of funding schools in need. After all of this work, the legislature did not appropriate the funds needed for this bill; so, from 2018 to 2019, there was no loan forgiveness under this program.

SB 115 (2017) revised the National Board Certified Teacher stipend program, to increase the frequency and financial support. The previous program paid a one-time, $3,000 stipend, to teachers with the certification. Under the new program, stipends would be ongoing as long as the teacher held the certificate, and payments were tiered so that a teacher received a larger stipend if their school was in a "high poverty area or impacted by a critical educator shortage" (Montana Legislative Summary, 2017, p. 34). The stipend came from OPI and was paid to the school district, not the teacher, and the stipend could not be calculated into retirement.

Most recently, in 2019, two bills directly addressed teacher recruitment and retention. HB 211 (2019) again revised eligibility for the Quality Educator Loan Assistance program with "the option to make a fourth-year payment of up to $5,000. The

payments are made directly to the lender and are exempt from Montana income tax" (Montana Legislative Summary, 2019, p. 40). The fourth-year payment is entirely the local school districts responsibility. If the fourth-payment is made then the teacher could apply $17,000 towards loan forgiveness (OPI, 2019). HB 211 also expanded the definition of schools impacted by the critical quality educator shortage, so that the number of schools qualifying increased from an estimated 420 to 670. This implies that more schools needed assistance and that, under the old definition, schools were not getting the support needed. The bill also designated $500,000 per year for the program. Finally, SB 139 (2019) revised the criteria for retirees to return to the classroom when a vacancy could not be filled. Retirees would not lose retirement benefits if they reentered the teaching force.

Teacher Perceptions: "If the workload was more reasonable." Teachers need to feel they have control or power over their professional and personal lives, but the ecologies or structures of rural schools does not always support that. Of the three Glacier participants, only Mac committed to returning. She described feeling helpful to students, that she enjoyed teaching her content, and that she felt comfortable teaching in Glacier. "There is familiarity, so I guess it's easy, which makes me feel bad that, that would be the reason for staying, is just because it's easy" (M.R2.01:02:17). Yet Mac shared that her day-to-day is "so hard, it's long, and I barely have time to go to the bathroom. I do feel comfortable here, knowing just the routine, and I feel like I'm part of that routine. I do feel, and this could be conceited, but I do feel like I am helping these kids quite a bit in teaching here" (M.R2.01:03:11). Mac went on to describe how she feels like she provides

some diversity to her students, and that if she were to leave, she would miss some of the kids and their families. Mac would leave for higher pay or to be closer to home. She cannot pursue a master's degree, which would increase her annual salary, due to a seasonal job, and the master's would not be worth it financially if she lost her seasonal job. Mac would be sad if she left Glacier, but she has applied three times for other teaching positions in the region[51].

Jean and Pat both shared that they were leaving Glacier at the end of the school year. They felt that they were leaving on good terms with their colleagues and the school district leadership. They were sad to be leaving the students, but they felt relieved to leave the heavy workload behind. Jean shared she resigned due to stress and that she was stagnating professionally. Jean wanted to grow her content knowledge and teaching skills. She also described herself as "not a small town person" (J.R2.00:44:22). She was anxious about the district's emerging gun policy, which was moving toward allowing an administrator to have a gun on campus in case of danger. A parent had threatened to hurt Jean earlier in the school year when they were upset by a lesson Jean taught. Jean was still emotionally affected by the experience at the end of the school year, although the situation had resolved on paper. Ultimately, Jean shared that she was leaving for both personal and professional reasons; she had applied every year to other jobs in districts

[51] In the spring of 2020, Mac shared that she had again applied and interviewed at other schools in the region. She was not offered the job, but Mac remained hopeful. She planned on returning to Glacier for the 2020–2021 school year and she was excited to teach a new course in her content area.

throughout the region. She planned on teaching again, in a larger community, after she earned her master's degree[52].

> I'm just ready for a change and burnt out on the level of work…I think that if the workload was more reasonable, and there wasn't as much drama with the community, and with teachers, and with the board, and all of that, I think that I probably would've stuck around longer (J.R2.00:49:06).

Like Jean, Pat was frustrated with the workload and the politics. However, the main reason Pat resigned from Glacier was because she was "existing not living" (P.R2.00:05:56). Pat had signed a contract for a new teaching job in Wyoming that provided a substantial pay raise as well as an increase in district contributions to retirement and health insurance. At her new position, Pat will only teach the subject she is licensed in, so her master's degree in the second content area will go on hold. Pat does want to pursue a master's in several years after she is established as a teacher[53]. Pat will have two different courses to prepare for as opposed to the six in Glacier, and she will teach in the content area she is certified in, which is a relief. When asked if she will continue with the master's at the new school, Pat commented that she will probably start a master's in her core content area (not the one mandated by Glacier in order to meet accreditation standards) in a year or so. Instead of enrolling in a traditional semester-based program, like she was in Glacier, she will again pursue a nontraditional online program that is self-paced.

---

[52] In the spring of 2020, Jean shared that she was hired in one of the districts she had previously applied to. She will be finishing their master's degree and teaching part time during the 2020–2021 school year.
[53] In the Spring of 2020, Pat shared that she was returning to her high school in Wyoming, and she was already looking into master's programs because she was successfully managing her teaching load.

Regarding the recruitment or hiring process, Pat compared her experience in Glacier to her new job. In Glacier, Pat recalled being interviewed by the superintendent and a school board member. She also remembers a lot of discussion about the community where she had student taught and that one of the board members had connections in Pat's prior town. Pat's perception was that her reputation and connections mattered more than her ability to design curriculum or instruct students. When Pat was interviewing for the new job, she was invited to apply in two Wyoming school districts, and both districts had Pat teach a lesson to a classroom of students. Pat was given the state standards, but she was expected to write her own objectives, lesson, and formative assessment. Pat said that she appreciated the performance interviews since it gave an opportunity to show her teaching skills and how she interacts with students. Pat then participated in a group interview that included an administrator, the department head, another teacher, a parent, and student. Finally, Pat was given an opportunity to ask the hiring committee questions and to tour the school building.

Concerning retention in Glacier, Pat shared that her decision to leave the school was mostly financial. However, she is also excited to have fewer classes to prepare. Pat will have an additional planning period at her new school, which Pat believes will help cut down on the time spent outside of school planning and grading. Finally, Pat described how the move was also beneficial for her social life.

> Living in a very, very, very small town, I feel like I'm under a microscope. Living in a little bit bigger town with a little bit more population, I won't feel so under the microscope, which will help me relax, and enjoy…Part of the move is personal as well, knowing myself, knowing like, "Okay, I've lived in two small towns and...I still feel like I'm under the microscope" so expanding, even going to a little bit bigger school, bigger town I think will

> take a little bit of the pressure off of my personal life as well (P.R2.00:53:30).

Between the financial gains and the manageable teaching load, Pat will have room to breathe at her new job, while in Montana she said that she lived in poverty.

Of the four teachers in Yellowstone, three committed to returning the next school year. Charlie decided to move on from Yellowstone because she was too stressed due to her teaching workload, and it was starting to impact her personal life. Charlie recognized her own high expectations contributed to her anxiety. However, she was not willing to sacrifice her health in order to continue teaching, which was starting to happen during the 2018–2019 school year. An opportunity opened up with a community non-profit organization that allowed Charlie to develop programs and events for both kids and adults. At the end of the school year, Charlie was offered this job and felt like it was a chance to grow professionally. When Charlie was asked if she might go back to teaching eventually, she said no, because she felt like there was no respect for a teacher's "capacity to work," meaning that the expectations of what could be accomplished during a day or a school year were unrealistic. Charlie also felt that she saw too many students and that this would happen in most schools. Constantly being overwhelmed led to feelings of stagnation or coping while teaching. Charlie identifies this as a public school system issue where a larger town would have the same issues, and she felt that teacher's do not have enough power to have an influence on keeping the system manageable. Charlie said that she left on good terms with the Yellowstone school district and she still has many friends on the staff. Charlie is also coordinating with the new teacher who filled her position to try and ease the transition by sharing her curriculum and resources.

Even the three teachers committed to staying in Yellowstone expressed that a challenge of teaching in Yellowstone was the fact that everyone has to "wear many hats" because of its size (S.R1.00:14:11). For example, several teachers have both middle school and high school classes, which makes scheduling, planning periods, and PD more complicated. Sam laughed and said, "One great thing is I get out of recess and lunch duty…I get a seven-minute lunch, but my juniors don't mind when I eat in front of them" (S.R1.00:11:30).

Most of the teachers acknowledge that their lives within Yellowstone and Glacier reach beyond the schools and their professions. In particular, they noted a connection to the natural environment as a key motivator for staying in rural communities. All of the teachers identified the geographic area/outdoors as a reason why they stay at Yellowstone. The environment was a part of their everyday life – personally, and in some cases, at the school too. All of the teachers also expressed a deep connection with the school community. For example, Sam said that she feels highly supported by her current administration, she values her colleagues, and through her entire tenure, she was financially supported, especially for PD.

> I think we are super supported to do the things you want to believe in...that you believe that, how education should be for the most part...the staff is super supportive. Even the ones that they know they're leaving in April and they're there until the very last minute, second of the year, whatever. They're super awesome people to be around. So, the area, the staff and then the administration and the board, allowing as much support as it probably possibly can (S.R2.00:52:00).

Erin and Alex voiced similar sentiments. Instead of referring to the trainings or continuing education as PD, Erin called it professional growth. Erin even said she loves

her coworkers, and she was very positive about her school. “I have a student teacher right now and she commented just a couple weeks ago, the relationships in this school seem really unique, and I really think they are” (E.R2.00:30:59). Finally, Erin recognized that she is able to stay in Yellowstone with her family because she secured housing in town. She recognizes the uniqueness of Yellowstone compared to other places in Montana, but says that any hardships she faces, in order to live in Yellowstone, are worth it. Unlike Erin and Sam, Alex does not live in town, but endures the long commute because she loves the kids and she teaches with really great people. In fact, Alex said that feeling valued by the kids and parents is the number one reason she continues to teach in the Yellowstone community.

As a veteran teacher in Yellowstone, Sam, has worked with nine or 10 different administrators (principals and superintendents) during her tenure. Sam also experienced the expansion of the school district from a K–8 to a K–12 district. At times, Sam was frustrated with the leadership because she felt like they were, “passing through, maybe, in their job and career. So, we didn’t hit it off” (S.R1.00:09:59). Sam “wears her heart on her sleeve” so the tension was not solely the fault of leadership. Sam also shared that she felt the current leadership was perhaps the “best fit” for the school and community; they had been there for several years and had kids in the school system, so Sam predicted that the superintendent/principal (a merged role) would stay for several more years. At the time of the interviews, the school board was negotiating contracts.

Chapter Summary

Throughout Chapter Four, the findings from the CPDA and semi-structured interviews were discussed in relation to critical place-consciousness and political values. The themes of recognizing responsibility, advocating for economic efficiency, believing in equality of opportunity, aspiring for quality, and engaging in systems of power emerged from both the CPDA and teacher interviews. The stories of the educators and their communities brought life to the state policies intended to address issues of recruitment and retention. It is apparent that providing equality of opportunity for students to access a quality education is complex, especially in rural areas and in schools impacted by the critical quality educator shortage. Chapter Five will connect these findings to the research questions, discuss the theoretical and practical implications, and finally, make suggestions for future research.

CHAPTER FIVE

CONCLUSIONS AND IMPLICATIONS

Introduction

This multisite case study and CPDA explored the history of school finance in Montana K–12 schools with a focus on equity and adequacy to determine the ways in which the State was or was not providing equality of educational opportunity. This study focused on the phenomena of recruiting and retaining HQTs in rural contexts, specifically the Glacier and Yellowstone school sites, both impacted by the critical quality educator shortage. Chapter One introduced the rationale for this study, while Chapter Two reviewed the literature on rural K–12 education including a summary of Montana's education history. Chapter Two also discussed the theoretical framework of critical place-consciousness (Gruenewald, 2003a, 2003b). Chapter Three described the data collection process in this multiphase case study, how CPDA was utilized as a methodology, and the characteristics of the participants. Finally, Chapter Four reported the findings from the CPDA of Montana education policy from 2004–2019 and the semi-structured interviews with teachers from the Glacier and Yellowstone school sites, through the lens of critical place-consciousness and political values.

This chapter begins with a discussion of the research questions in relation to the major conclusions from the study, including the themes: recognizing responsibility, advocating for economic efficiency and growth, believing in equality of opportunity, aspiring for quality, and engaging in systems of power. Connections are also made

between the findings and academic literature. The second part of this chapter will address theoretical and practical implications, introducing a new framework for education policy, a place-conscious social-ecological model. Finally, I will make suggestions for future research regarding CPDA and critical-place consciousness, as well as K–12 teacher recruitment and retention in rural contexts. While many of my findings align with current research, significant conclusions include that funding from the state legislature is not adequate, that teacher workload and compensation is greatly affecting Montana school districts ability to recruit and retain HQTs, and that rurality is not the primary cause of these challenges rather they are universal thus requiring systemic solutions.

"It would be helpful if more could be done to ease these problems": A Divide Between Rural and Non-Rural Schools

Research question one investigates, "Is the state fulfilling its responsibility to provide equality of educational opportunity to students in rural schools through supporting teacher recruitment and retention?" Findings come from both the CPDA and the semi-structured interviews to answer this research question; findings were organized by core dimensions of critical place-consciousness (Gruenewald, 2003a, 2003b). The findings demonstrated a disconnect between policies and the reality of teaching in rural schools, that schools rely on state funding for staffing and resources, and that the state legislature needs to provide more financial support and retain teachers, so that rural schools can compete with non-rural schools.

In relation to the sociological and political dimensions of place and the political values of responsibility and economic efficiency/growth, the CPDA of *Columbia Falls v.*

State (2004/2005) presented that the state was not providing an adequate education because the funding model was not based on educationally relevant factors. The sociological dimension of place explained how power and culture manifest in place, while the political dimension explore how power and politics are established in place. During CPDA I recognized that the legislature needed to do more than define educationally relevant factors and that place needs to also be meaningfully integrated. Specifically, teachers at rural schools continue to be marginalized, for example, in their unsustainable course loads, low-salaries and access to affordable housing. When education stakeholders incorporate place-consciousness into their decision-making, policy reflects how education intersects with other facets of society such as housing, the labor market, and healthcare.

In relation to the perceptual dimension of place and the value of equality of opportunity, the *Columbia Falls v. State* (2008) Findings of Fact revealed that there had been many improvements since 2004. However, Judge Sherlock also felt compelled to make suggestions "as to avoid future problems," which implies that the policy changes still did not fully provide an adequate education (*Columbia Falls v. State* – Discussion, 2008, ¶146. 118). One of the "continuing problems" that Sherlock notes is teacher recruitment and retention, "increasing salaries for rural and isolated districts would have a noticeable impact on recruitment and retention problems" (*Columbia Falls v. State* – Discussion, 2008, ¶150. 122). The salary adjustments that were made (in 2005 and 2007) were for all schools, so they did not incentivize educators to work in more rural schools. Also, the policies were "based on salary data weighted towards larger districts in

Montana and more urbanized regional states" (*Columbia Falls v. State* – Discussion, 2008, ¶107. 79). This aligns with the perceptual dimension of place which explores how power and perceptions are revealed in place; in the *Columbia Falls* (2008) examples above non-rural schools had more power than rural schools.

The CPDA of legislative summaries from 2005–2019 also showed that the Quality Educator Loan Assistance program did not receive funding during the 2017 legislature, which gives the perception that supporting hard-to-staff schools is not a priority. When funding was reinstated in 2019, there was no inflation adjustment; however, payments were to be made directly to the lender, and the payments were exempt from state income tax. This also exemplifies the ideological dimension of place in which policies are expressive of power and who holds the power.

In this case, the state legislators and OPI hold the power, which they used to redefine a school impacted by the critical quality educator shortage. Of the six criteria used to identify a school impacted by the educator shortage, one was a revised definition of rurality, which subsequently increased the number of schools qualifying as effected by the critical quality educator shortage from 420 to 674 (OPI, 2019). While $500,000 was designated for the Loan Assistance Program, during the 2019–2020 schoolyear $273,069.78 was spent.[54] In the future the increase in eligibility means that the funding may not be adequate[55]. It is unclear whether OPI or the state researched how many

[54] I emailed OPI in October 2020 to inquire about the success of the Loan Assistance Program during the 2019-2020 school year since a report was not published at the time, and this is the information they shared.
[55] The 2019-2020 school year was not a "traditional" year as an international pandemic was declared in March 2020 causing most Montana schools to move to emergency virtual instruction for the remainder of the schoolyear. This may have impacted the number of teachers applying to the loan program because they either did not know about the program or did not have the capacity to apply.

teachers may qualify for the program, but that would be a practical suggestion. However, the fact that 674 schools are currently having a difficult time hiring and retaining teachers shows the magnitude of the issue of teacher recruitment and retention. Thus, CPDA also shows that the state needs to provide more financial support than is currently offered in the loan program, and that without fully addressing salary issues, the state may not be providing its share of equitable or adequate funding, specifically for rural schools.

The results from the semi-structured interviews support the results from the CPDA. Every teacher described personal financial hardship, except one, but that teacher recognized the challenging financial situation of her school district. For example, in Glacier, both Jean and Pat were hired to replace two teachers each, so two teachers were doing the work of four teachers—a decision the district made based on funding. Due to the unsustainable workload, and for Pat the low salary, they both left at the end of the school year. All participants described that when a teacher leaves a school district it is difficult to transition curriculum and all of the professional development the district invested (Guin, 2004; Keesler & Schneider, 2010) therefore affecting the quality of instruction and learning (Merrill, 2014; Ronfeldt et al., 2013). This implies that there is no equality of opportunity for students at a school with high teacher turnover compared to a school that retains teachers, and in Montana the schools impacted by the critical quality educator shortage are predominantly rural schools.

Several teachers described their districts as doing the best they can with what they have; however, four teachers, one from Glacier and three from Yellowstone described how they were also concerned about facilities. The teacher in Glacier was concerned with

safety, and the teachers in Yellowstone were concerned with space. These issues are directly related to providing an adequate education and equality of opportunity. Teachers in non-rural schools also face unsustainable workloads (Geiger & Pivovarova, 2018) and inadequate resources or space; however, these challenges are often compounded in rural communities because of their size and access to other supports.

In conclusion, the findings show that regarding teacher recruitment and retention, the state is not fulfilling its responsibility to provide an equitable education since a large number of rural schools are having a difficult time hiring qualified teachers. Because recruitment and retention continue to be a greater challenge for rural schools, this is indicative of organizational or systemic problems (Biddle & Azano, 2016; Darling-Hammond, 2010; Darling-Hammond et al., 2017; Greenwood, 2019; Ingersoll, 2001; Ingersoll, May, & Collins, 2019). Finally, there is also evidence that high teacher turnover is affecting the quality of education; therefore, the state is not providing an adequate education (Hanushek, Rivkin, & Schiman, 2016; Ingersoll, 1999, 2002; Sutcher et al., 2016; Sykes & Martin, 2019; Thomas & Darling-Hammond, 2019).

"They just don't get it": The Disconnect Between Policy and a Teacher's Reality

Research question two explores, **"**What have been the outcomes, in terms of adequate support (funding, curricula, and accreditation), for teacher recruitment and retention in sample Montana rural school districts since the initial *Columbia Falls v. State of Montana* (2004/2005) decision?" Research findings for this question also come from both the CPDA and the semi-structured interviews. Themes two and four were most

relevant to this research question. The political dimension of place and economic efficiency was evident throughout the CPDA of legislative summaries from 2005–2019 and the SFIC Report (SFIC, 2016) showed that the state's revised funding formula provides supplemental financial support for lower-income districts, a quality educator payment was created by the state, inflation adjustments were secured for some funding components, and both a Quality Educator Loan Assistance program and a National Board Certified teacher stipend were created. These policies address funding for teacher recruitment and retention; however, the funding allocations have not been consistent between 2005–2019 and may not address complicated systemic issues, which will be discussed more in conjunction with RQ2A and in practical implications.

The ideological dimension of place and aspiring for quality was apparent in the curricular support for teachers, when after *Columbia Falls* (2004/2005), the state revised accreditation standards to include updated program standards for all content areas and academic requirements for a "basic" education at the elementary, middle, and high school levels. According to ARM 10.55.603, it is the responsibility of local school districts to align their curriculum to the state content standards. The state does provide funds to curriculum through the general fund components (OPI, 2019).

Regarding accreditation, 20-9-309 MCA defines factors of a quality education and the revised funding system. During the CPDA, questions arose about the state's focus on qualifications, but not necessarily on quality or effectiveness. This is worthy of discussion because of the pedagogical differences in being qualified to teach and instructional quality (Darling-Hammond et al., 2017). Often quality instruction or

curriculum is measured based on student performance—a teacher is effective if their students consistently master their skills or concepts, or at least are exhibiting academic growth. While it is reasonable that a detailed process of measuring teacher effectiveness was not included in this specific code, the almost complete absence of evaluating instructional effectiveness may imply that it is not a priority. This notion was substantiated when the CPDA of mentoring and induction policies were reviewed, and I found that there was minimal support for these programs. While local school districts are expected to have mentoring and induction programs (ARM 10.55.714), which hypothetically would increase teacher effectiveness, the state provides no supplemental funding or guidance at this time. This again is reflective of the ideological dimension of place and how there are sometimes incongruencies between the intent of a public policy, how a policy affects teachers, and how places implement a policy.

However, in ARM 10.55.701, there is a directive for the Superintendent of Public Instruction to develop a model evaluation tool, which is currently recognized as the Montana-Educator Performance Appraisal System (EPAS). The EPAS would be interesting to investigate in future research, especially since it is only required annually for non-tenured staff, and it is recommended to align with districts' mentor or induction programs required by ARM 10.55.701(5)(b). The case study participants recognized that mentoring and induction programs were not formal, research-based, or consistent across their districts or year to year. This implies that there is a disconnect between policies and practice in schools, as well as the notion that local ideologies have greater impact than the state.

Another point about accreditation comes from *Columbia Falls v. State* (2008), when Judge Sherlock states, "increasing problems with accreditation standards were evidence of inadequate funding" (*Columbia Falls v. State* – Findings of Fact, 2008, ¶128. 100). The report on the critical quality educator shortage shows that recruitment and retention continued to be a challenge in rural schools, and the report also showed that school accreditation status is impacted by teacher shortages. In the interviews, teachers at both Glacier and Yellowstone perceived their school's accreditation as impacted by hiring; they knew of teachers who were teaching outside their content areas, including participants Pat and Sam. While this could be problematic since teachers may lack pedagogical content knowledge, districts are also demonstrating flexibility and creativity in staffing. When the unique needs and assets of a place are considered, a district may implement more effective solutions than they would under the "traditional system." For example, in Yellowstone, Sam recently moved positions within the district. While she is still developing her curriculum, her knowledge as a veteran teacher and a community member with deep connections to place are arguably more beneficial to the students than an early career teacher who may have the official qualifications.

Teacher perceptions were critical of the state's support for recruitment and retention. Several teachers described the situation as an "impossible puzzle" where educational needs were always greater than the available funds. However, none of the teachers interviewed used the Quality Educator Loan Assistance Program or the National Board Certified teacher stipend; a majority were unaware of either program, although

they were not surprised when they heard that funding for the loan program had been cut from 2017–2019.

Regarding recruitment, five out of the seven teachers explained that prior relationships helped them acquire their jobs. The state did not provide any financial incentive for the teachers to work in their districts that were identified as being impacted by the critical quality educator shortage other than the Loan program and National Board stipend. Again, teachers were unaware of both programs, and the majority of teachers no longer had school loans that needed assistance. The one teacher who did talk about aggressively paying off her loans described it as a confusing process, so she did not feel comfortable trying to alter any payments, and she was not sure if her content area qualified.

Concerning curricular support, there was little mention of the state other than professional development offered by the OPI, which makes sense since the local board of trustees is responsible for developing a curricular program to align with the state standards. All teachers described how their districts supported professional development. The Glacier teachers felt they could ask their superintendent to pay for PD, especially if it was offered from the OPI, and one teacher had a conference out of state covered by her district. The majority of teachers also felt they had the curricular resources they needed for instruction. However, one teacher needed updated technology to effectively teach her content and another described their facilities/equipment as outdated, which created unsafe situations preventing some instruction. That teacher had raised her concerns to the administration, and she believed lack of funds was the reason facilities had not been

upgraded. Glacier teachers were responsible for creating their own curriculum, and they did not feel like they always had enough time to develop the quality of lessons they wanted, but felt they were getting by.

The Yellowstone teachers described ways their district invested in their staff and growing their professional capacity which relates to the ideological dimension of place and aspiring for quality. One teacher even described the support she received as transformational, and she noted that she did not think it compared to other districts. When Erin calculated the amount of money that Yellowstone had spent on her, she estimated that it was thousands of dollars, but that most came from the school's private foundation. Yellowstone was also paying for an outside program to lead PD at their schools to guide their new curriculum development. Even with the PD, teachers were concerned about having enough time to develop their new curriculum. Several teachers discussed using their summers to write curriculum but noted that the compensation for their time was inadequate.

Finally, all of the teachers described making sacrifices in order to be at their schools. For most of the teachers, it was a financial sacrifice—they were earning barely enough to pay rent, or they were commuting over thirty minutes because they could not afford to buy a home in their community. These commutes were described as dangerous during Montana winters, in Yellowstone specifically, and the two commuters explained that they had friends to stay with in town if needed. Two teachers chose to live outside of their school community because they wanted to separate their personal and professional

lives; those teachers also had partners with full time jobs. Pat, who was single, said she could not afford to live out of town, even if housing was cheaper.

All of the teachers described the workload of teachers as overwhelming, and most described it as a problem (Darling-Hammond et. al., 2017; Ingersoll, 2001; Schleicher, 2020). An economic decline in Glacier led to less funding for staffing and resources while economic growth in Yellowstone increased student enrollment at a rate where the school struggled to meet the demand (Ingersoll, Merrill, Stuckey, & Collins, 2018). Six out of seven teachers described salaries as inadequate—leading teachers to have second or even third jobs (Lavalley, 2018; Showalter et al., 2019). Again, all seven teachers felt the state was not adequately addressing retention, and that there was a disconnect between economic policy and a teacher's daily reality (Darling-Hammond, 2010).

"They're sticking band-aids on all of this": Short-Term Solutions to Systemic Challenges

Research question 2A asks, "How has state policy affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?" This is the final research question where findings come from both the CPDA and the semi-structured interviews. Themes four and five are discussed, as notions of quality and systems of power influence policy and teacher experiences. Both Glacier and Yellowstone schools were impacted by the critical quality educator shortage. During the 2019–2020 school year, Glacier had six positions that had a small recruitment pool (less than five candidates applied for each position and the positions were vacant for at least 30 days) or were filled with provisional licenses

(OPI, 2020). Yellowstone had nine positions with either a small recruitment pool or that were filled with a provisional license, and one of those ended up being an emergency authorization (OPI, 2020). As noted above, the two primary state policies addressing teacher recruitment and retention were the Quality Educator Loan Assistance Program and the National Board Certified Educator Program, and both were not utilized by any of the participants, nor did they know anyone who participated in either program.

While teachers recognized that staffing and salaries were a joint responsibility between the state and their local community, all of the participants felt that the state needed to do more to directly address this issue. Mac addressed the inequitable salaries between different sized school districts when she explained that it did not make sense for teachers at larger schools to get paid more based solely on their total student population or local tax revenues; Mac instructed as many students as her peers at a larger school because she was the only full time teacher in her content area (Lavalley, 2018; Showalter et al, 2019). Three teachers, including Erin, described how her first few years in Yellowstone, the student population fluctuated, which affected hiring. Erin thought about moving to a larger school where she would have more job security. Teachers at both Glacier and Yellowstone identified incongruency between state policies that determine funding for staffing and the reality for schools.

Next, several teachers compared the public education system in Montana to Wyoming—a comparison which I recognize is more complex than was described. However, teachers felt that Wyoming politicians chose to prioritize education through the use of funding: the state consolidated healthcare benefits, organized retirement benefits,

and allocated money to schools to maintain their buildings. Pat even described her interview process as very different between Glacier and her new Wyoming school. She appreciated the performance interview and how professional the experience was. She felt she had the opportunity to really show her instructional skills and how she builds relationships with students—the interview process was more about her as a teacher and less about her personal connections. This example demonstrates the complicated relationship between education and places. Teachers value their connections to place, but they still want to be treated as professionals and not judged for their personal life. Three teachers described Montana as needing to adapt since a state just south of it was paying teachers substantially more, incentivizing educators to move to Wyoming. This was true for Pat, and she described several other teachers who made the move from Montana to Wyoming.

The state addressed the professional capacity of teachers through requiring teachers to engage in professional development (PD) in ARM 10.55.714, and the state mandated that local districts shall establish mentoring and induction programs in ARM 10.55.701(5)(b). Concerning PD, ARM describes the expectations, including how meaningful PD "respects and nurtures the intellectual and leadership capacity of teachers" and that it should be "ongoing and sustained" (ARM, 10.55.714). However, state funding is not consistent and varies depending on the component of education the PD addresses (such as Special Education, IEFA, curriculum, etc.). Often PD expenses are the responsibility of the teachers themselves, especially when teachers are earning

licensure renewal credits, such as registering for Montana's annual conference, the MEA-MFT Conference.

Teacher induction and mentoring programs are defined in School Leadership, ARM 10.55.701, which was discussed under Theme 4: Ideological Dimension of Place and Quality. This section of ARM does not discuss any procedures for establishing an induction or mentoring program, and again, funds were never set aside by the legislature to directly support this initiative. Thus, while induction and mentoring are written into Montana's ARM, the state provides no clear guidance or direct funding for the initiatives. The teachers also expressed that mentoring was not consistently or formally integrated into their districts. All teachers emphasized how vital collaboration was, but that opportunity did not come from formal mentoring. Truly transformative relationships and professional development happened organically which aligns with the ideological dimension of place-consciousness.

In summary, the state has not directly addressed rural teacher salaries, and the funds that were allocated to districts based on ANB did not seem to suffice since teachers repeatedly described a reality where there was a disconnect between perceptions and the reality of a teacher's daily life. The loan forgiveness program and the National Board Teacher Stipend are short-term solutions to systemic issues, which includes unsustainable work conditions for many teachers. Even if the State devises long-term solutions, more needs to be done to respect the professional capacity of teachers.

The "Don't mess up kind of environment" and the "Super supportive" District: Teachers want Respect

Research question 2B focuses on **"**How has local policy, as perceived by practicing K–12 teachers, affected recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?" Research findings for this question only come from the semi-structured interviews, and local policy is interpreted as more than formal written policies, to include programs and even "handshake deals." In both Glacier and Yellowstone, the local school boards exercise significant power. The teachers approached their school boards cautiously; however, in Glacier all three teachers said they try to "fly under the radar," while Yellowstone teachers are simultaneously appreciative and frustrated with the local board. This discussion of power connects directly to theme five, the ecological dimension of place and how teachers are constantly engaging with/in systems of power.

Glacier teachers described their board as often making decisions based on tradition, which they felt was dangerous. Yellowstone teachers felt there was a disconnect between how the board viewed teachers and their reality, especially concerning workloads and finances. For example, the school board would not raise the daily rate of substitute teachers, so Yellowstone was having a difficult time finding substitutes, leaving teachers to cover for each other if they had an appointment. Glacier also had difficulty finding substitute teachers. Mac recalled having to cancel a family trip because the district could not find a substitute. Neither school district had financial incentives for teachers to move there, even though both communities struggled to offer teachers

affordable housing. Even if housing was offered, three teachers would still choose to live outside of the town to separate their personal and professional lives.

In 2019, Yellowstone's levy passed, and the county commissioners approved a local project to build teacherages – affordable housing for teachers who otherwise may not have a home. The teacherages were local place-conscious solutions to the housing issue, supported by veteran teacher leaders who had established trust and respect among their peers. The teacher leaders worked with the community to develop the teacherage proposal, which showed how teachers value the culture of their community and local knowledge. This was essential since Yellowstone teachers recalled other teachers being hired and then declining the job because they could not find a place to live. Unfortunately, the current teacherage only has three units, so the Glacier teachers predicted there would be greater demand. A second issue was that at the time there was no clear pathway to homeownership of one of the units, and Alex felt that teachers who commit to Yellowstone will eventually want to own a home in town. Alex was also concerned that the units would be truly affordable, so that teachers could start saving, perhaps for buying their future home.

Local districts did not provide any moving expenses, signing bonuses, or COLA in new teacher contracts. One teacher in Yellowstone described how their superintendent had a COLA included in his contract, which allocated an extra $20,000 towards his living expenses. The teacher was frustrated that the board did not see the same value in their teachers; the Board was willing to essentially give the superintendent a $20,000 bonus but nothing to help teachers who were making substantially less. In 2019, the

Yellowstone teachers were able to negotiate a pay raise after their local levy passed; however, the levy situation showed again how support for teachers was not consistent and that financial support was contingent on the local economic capacity or culture. If a community valued and trusted their education system, then citizens were more likely to support it financially, if they could afford to do so.

School districts published salary schedules, outlining teacher raises based on experience and education. The National Board certification may be more rigorous or a more effective measure of teacher quality than master's degrees, which are earned from higher education institutions of varying quality or expectations. However, the fact that none of the teachers at these schools even knew about this stipend shows that it was not advertised at their school. Furthermore, six out of seven teachers were already overwhelmed by their workload, so they did not have the professional capacity to engage in the National Board certification process at the time. The district salary schedules still favored the traditional education step as opposed the National Board certification, so four out of the seven teachers had their master's and another two were planning on earning their master's degree. If the state wants to encourage teachers to pursue the National Board certification, then the stipend and state match will need to be competitive with salary schedules.

Another solution that Yellowstone had available to address teacher recruitment and retention was a private foundation. This foundation was available to tenured teachers, who could apply for tax-free grants of anywhere from $5000–$15,000 for assistance with housing or education. If a teacher left before their teaching commitment ended, they

needed to return the funds. Three out of the four Glacier teachers had used the fund, but they noted that the guidelines around accessing the funds were inconsistent and that the fund was depleting. However, they were thankful for it and the other local financial support. Erin estimated that 90% of her professional development was sponsored by the foundation, and she emphasized that many schools did not have access to similar support. Charlie described a different local foundation that paid for a large portion of her students' annual field trip out of state. While the Yellowstone district is fortunate to have these funds, it also highlights the disparities between districts and how a reliance on local funds creates unequal educational opportunities for students.

The issue of retention for teachers at both schools was not only an issue of compensation, but also included workload and staffing. Jean, Pat, and Charlie all recognized that their respective schools did not have the funding to hire additional teachers. They were frustrated that workloads were not distributed evenly among their staff. For example, all three of the teachers who left their school had 5–6 different courses to prepare for, only one planning period, and no study hall. Other teachers at their school had much smaller classes and/or a study hall that required minimal planning or supervision, so the teacher essentially had a second planning time. Teachers spoke of wanting their time and professional capacity respected, and they expressed a need for more support in order to provide holistic, quality instruction.

Yellowstone was also in the process of developing and integrating a new curricular program that was internationally recognized. As seen in Chapter Four, teachers debated the educational value of the program; however, they all agreed that it could help

alleviate some challenges associated with recruitment and retention since the school could post jobs through the international network. The teachers also thought it may be easier to transition a new teacher in because the curriculum and culture was similar amongst all schools belonging to the international program.

None of the teachers from Glacier or Yellowstone had induction programs at their current schools. They inferred that this was probably due to funding and transitions between school leaders. If a principal or superintendent was not at a district for several years, it was difficult to establish an induction program while the school leader was still learning the policies themselves. Concerning mentoring programs, Jean was the only teacher at Glacier that found the school mentoring very valuable, and Jean added that her mentor was the only teacher at the school who had attended formal training. In Yellowstone, the situation was similar, where teachers had minimal to no training in mentoring, so there was not much consistency or accountability. All of the teachers valued more informal mentoring because organic relationships could form instead of having assigned mentors-mentees with formal protocols. Alex and Erin spoke about how a meaningful mentor-mentee relationship can be transformational and can help retain an early career teacher (Smith & Ingersoll, 2004). The Glacier and Yellowstone teachers wanted time built into their schedules for training and collaboration if mentoring and induction initiatives became required at their schools which aligns with job embeddedness (Mitchell, Holtom, & Lee, 2001; Watson, 2018) and place attachment (Kudryavtsev, Stedman, & Krasny, 2011; Manzo, 2005; Vanclay, 2008).

While the Glacier teachers described feeling isolated, the Yellowstone teachers described more opportunities for collaboration and team building. Both groups of teachers were often the only teachers instructing their specific content, but Erin described how there was time built into their Yellowstone schedule to co-plan, which allowed for professional growth. Even with supports built in, all of the teachers agreed that teaching was a hard job that was emotionally taxing, and challenges like teacher attrition were systemic issues—not unique to their local schools. In other words, the findings support current literature, that recruitment and retention is not just a "rural problem", and that the state needs to provide more support for teachers while integrating place-conscious policy (Biddle & Azano, 2016; Darling-Hammond et al., 2017; Darling-Hammond & Podolsky, 2019; Schaft, 2016; Sykes & Martin, 2019).

Theoretical Implications

Gruenewald's critical pedagogy of place (2003a) and critical place-consciousness (2003b) theoretical frameworks guided this investigation of K-12 teacher recruitment and retention in Montana. Critical place-consciousness has historically been applied to rural education research and environmental or science education, so while it is relevant to this study, I am also expanding on the frameworks by applying the core dimensions of place-consciousness to education public policy. By layering the CPDA with the Glacier and Yellowstone teacher interviews, it became apparent that more authentic attention needs to be directed at integrating place-consciousness into education policy. Despite the widespread assumption that education is shaped by "local control", this study

demonstrates that policymaking, especially in a geographically large, rural state like Montana, requires purposeful attention to place-consciousness. While any policymaker can add the word "local" or can describe how Montana values its small schools, there is a difference between words and action—when policymakers deeply experience the places their work impacts.

Through the CPDA there was evidence of place-consciousness, particularly the political and ideological dimensions of place; however, place-consciousness was more apparent in the interviews with the teachers. All seven of the educators had a genuine connection to their schools as well as the individuals and communities that lived in those places. The schools also implemented innovative solutions to address the specific needs of their community, such as affordable housing through the teacherages, which reflects place-consciousness.

Interestingly, of the three teachers who left their schools at the end of the 2018–2019 school year, Charlie worked at a non-profit in her same community, Jean continued to teach and live in a neighboring community, and Pat moved to a different rural community to teach. This implies that the teachers have a connection to rural spaces, and that other factors, such as salaries and workloads, caused the teachers to leave their school sites. Thus, "rurality" may not—in and of itself—be the main cause of the recruitment and retention problem as policymakers may suggest. Instead, many of the factors pushing teachers to leave schools are viewed as cultural or systemic issues that transcend rurality, such as low salaries and unsustainable teaching schedules, and have

long been critiques of United States public education (Biddle & Azano, 2016; Darling-Hammond, 2010; Darling-Hammond, et al., 2017; Schleicher, 2020).

Biddle and Azano (2016) posit that education stakeholders and researchers need to reframe language to focus on values and power so conversations around phenomena like recruitment and retention move towards solutions. Otherwise, we risk becoming entrenched in viewing the issues as unsolvable or unintentionally viewing places as deficient. For example, Biddle and Azano suggest that researchers reevaluate conversations around teacher pay to concentrate on equity: "Does place-based school funding continue to marginalize low-income communities? Do teachers in a given state receive equitable pay? … [when] researchers discuss pay equality for teachers, they can reposition rural education challenges by understanding how policy inequitably privileges place" (2016, p. 315). This thinking directly aligns with the methodology of this case study, synthesizing critical place-consciousness and political values (Fowler, 2013) with the CPDA and teacher interviews.

Biddle and Azano's approach to place and policy supports the findings that Montana state policy continues to inequitably privilege non-rural places when the legislature does not address long-term solutions to teacher recruitment and retention. While progress has been made to define and fund educationally relevant factors, the legislature is not adequately funding its share in order to ensure equality of opportunity for students in rural schools. Findings from both the CPDA and analysis of the teacher interviews implied that the loan assistance program and the National Board Certified teacher stipend were short-term solutions to issues of retention since the programs were

not consistently funded or advertised. Long-term issues such as teacher workloads, affordable housing, salaries, health benefits, and support for facilities, staffing, or mentoring/induction programs were not directly addressed by state policies, even though all of the teachers identified these challenges in their interviews.

Therefore, a new theoretical framework is needed, which integrates place-consciousness into public policy. The policy process traditionally follows a sequential model, where stages build on each other; however, in reality, the process is more complex and iterative. The stages include issue definition, agenda setting, policy formulation, policy adoption, implementation, and evaluation (Fowler, 2013). The proposed theoretical framework builds on the scholarship of Gruenewald (2003a, 2003b) as well as his more recent work where he asserted "Any political program that neglects the inner life and its stories neglects the core of experience, the psychic center of values, beliefs, thoughts, and actions" (Greenwood[56], 2019, p. 374). The intersectionality of policy and place must become explicit, so meaningful solutions to community challenges are implemented.

While reflecting on the stories of the teachers from Glacier and Yellowstone and applying the core dimensions of critical place-consciousness to their narratives, I recognized that the social-ecological model (Golden & Earp 2012), which is often applied to developing healthcare policy, could also apply to education. While the social-ecological model traditionally has five levels (intrapersonal, interpersonal, institution, community, and policy), there is limited research on multilevel approaches to public

[56] Greenwood is the same person as Gruenwald; he changed his last name.

health problems (Golden & Earp, 2012). Based on the findings of their study, Golden and Earp (2012) suggest, “As with any multifaceted problem, a multipronged approach is likely required to change our current intervention approaches” (p. 370). This can be applied to education as well, and while it is already happening in some capacity at the local level, it needs to happen at the state level too. The creation of teacherages in Yellowstone is an example of a local intervention intended to address the affordable housing issue, as is building teacher schedules to provide time for collaboration and planning.

Figure 11 shows how place-consciousness should overlap with public policy, integrating the needs, wants, and assets of individuals and communities to create effective place-conscious education policy. This is only possible when one considers the culture(s) and power dynamics that are influencing all of these “levels.” This connects back to Gruenewald’s dimensions of critical place-consciousness (2003a, 2003b; Greenwood, 2019), particularly his ecological dimension of place, which explores the intersections between power and systems.

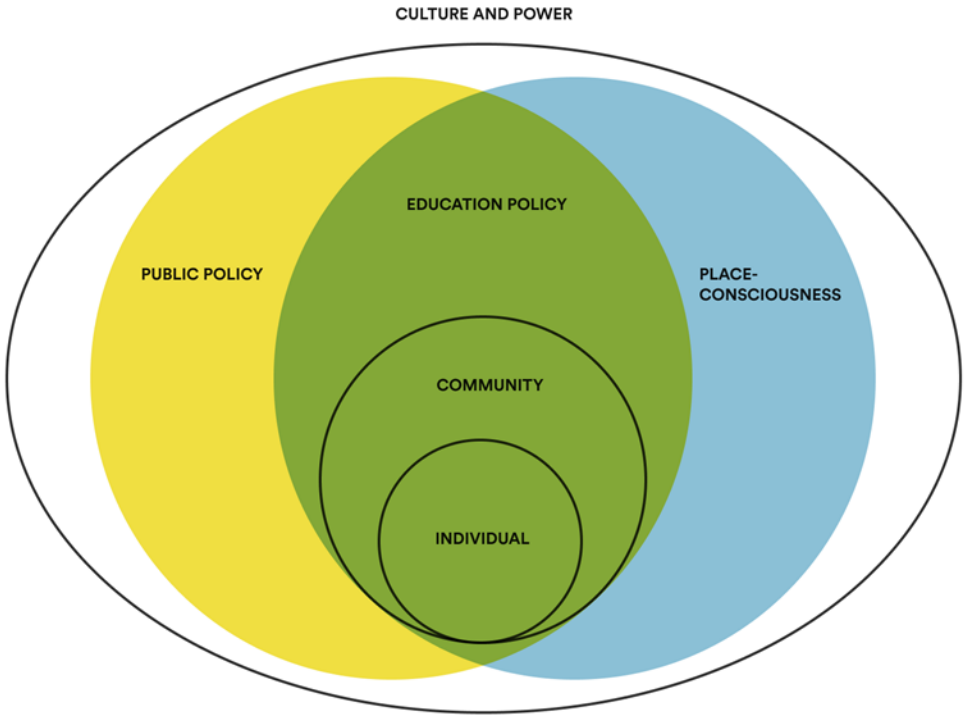


Figure 11. The Place-Conscious Social-Ecological Model: A new perspective for education policy. Adapted from the Rural Health Information Hub, 2020.

The new, proposed model can be interpreted from the outside-in or inside-out. Culture and power influence everything, including both public policy and place-consciousness, which affect communities and individuals. The alternative view is that individuals create communities, which influence both place-consciousness and public policy. Place-consciousness and public policy are representations of culture(s) and power. Either interpretation of the theoretical model recognizes an overlap between place-consciousness and public policy, which is the new space for education policy.

Power is identified as having multiple dimensions and forms including explicit exercises in power (force, economic dominance, authority, and persuasion), mobilization

of bias (culture, organizational structures, and procedures), and shaping of consciousness (communication, myths, and symbols) (Fowler, 2013). Within these dimensions, there are also major power resources such as material resources (control over working conditions, money, and time), social resources (official position, social status, and visibility), and knowledge resources (control of informational, skills, and understanding how the system works) (Fowler, 2013). The major education stakeholders or actors, such as policymakers, administrators, teachers, classified or certified support staff, students, parents, and the public, all exercise different types of power and have access to different power resources (Fowler, 2013). The hope is that by recognizing the roles that culture and power play when creating public policy that stakeholders such as teachers may feel empowered to identify inequitable practices, that teachers will be involved in creating solutions (if they are provided the professional capacity to do so), and that teachers will evaluate how public policy is or is not place-conscious. Teachers are simultaneously professional educators and community activists, working to provide equality of opportunity for students to a quality education.

Practical Implications

Throughout this dissertation, I became aware of the unique opportunities that rural schools provide for their students and the innovative solutions schools develop to tackle problems such as schedules or staffing. My positionality did not change significantly although I am more critical of state policies. For example, I continue to advocate for school districts establishing effective mentoring and induction programs, but I better

understand how complicated it is to establish a mentoring program, especially in rural schools, therefore a place-conscious lens needs to be applied. With any policy initiative, I now reflect on how the policy impacts rural schools as well as Montana's urban clusters.

Regarding policy, in response to *Columbia Falls v. State* (2004/2005), the legislature revised the funding system to align with components for a quality education. Since those changes were instituted, there have been several challenges to the funding model, including, but not limited to, whether components (Quality Educator[57], Special Education, etc.) properly adjust for inflation; the difference between base funding allotted to elementary versus secondary school districts[58]; and how to best address the critical quality educator shortage when Judge Sherlock suggested an increase in salaries (2008). Judge Sherlock also predicted that there would continue to be future disputes because of the number of schools in Montana and the competing financial needs of rural/non-rural schools. While Montana policy claims to value local control, the legislature needs to recognize that the disparities between property-poor districts and wealthy districts, weakens local control. Darling-Hammond (2010) explains "a level playing field of resources might be a precondition for genuine local control of educational decisions that matter" (p. 100). Resources can include, highly qualified teachers, so I will make several practical suggestions related directly to recruitment and retention while recognizing the efforts of other education advocates and that education policy is complicated.

---

[57] This not a reference to the Loan Program; Quality Educator here refers to one of the five components the State identifies for funding all school districts.

[58] During the 2019–2020 school year, elementary school districts were allotted $5,624/student and high school districts were allotted $7,201/student per Mont. Code Ann. 20-9-306 (Education Commission of the States, 2019).

The CPDA included a review of the 2016 SFIC report, which listed four recommendations related to recruitment and retention: the legislature should revise the Quality Educator Loan Assistance Program, education stakeholders should coordinate to ensure quality induction programs in schools, the MUS should create rural preservice experiences, and the MUS should expand their programs, including online, to reach potential teacher candidates in rural areas. While salary was identified by the SFIC as one factor contributing to recruitment and retention difficulty, it was not included in the SFIC recommendations, which is problematic.

I recognize that funding has increased significantly from the 2004 when the *Columbia Falls v. State* lawsuit was filed (OPI, 2020). However, given several of the key findings of this dissertation, I recommend:

<u>The Montana legislature should…</u>

- Compare the salaries of teachers at Class AA, A, B, C, etc. schools and explore what can be done to make compensation equitable.
- Complete a study to determine the total cost of increasing rural teacher salaries to be more equitable with larger Montana towns.
- Conduct a study comparing teacher salaries to professionals with equivalent levels of education.
- Conduct a needs assessment for school facilities, and the reality of teachers work conditions including courses taught and plan time.
- Increase the annual stipend for the Quality Educator Loan Assistance Program and the National Board Certified Program to meet national standards ($5,000/year and $4,000-$8,000/year respectively according to Odden and Picus, 2014).
- Provide funding for the OPI to offer training for school district induction, mentoring programs, and professional learning opportunities for school leaders.

<u>The OPI and State Education Associations should…</u>

- Provide training for induction and mentoring programs applying place-conscious program options including in-person, virtual, or hybrid. Support districts in creating materials and engaging in the process.

- Continue to expand the Teacher Learning Hub and Digital Academy to support teachers in meaningful professional development and supporting sustainable teacher workloads.
- Provide professional learning opportunities for school leaders where they can share best practices in fostering a positive school climate and place attachment.

Local School Boards, Districts, and Schools should…

- Based on the OPI trainings, provide place-conscious induction and mentoring programs that best meet the needs to the school.
- Address affordable housing (both renting and owning); provide teacherages/school housing if needed; or redesign compensation packages to align with the cost-of-living.
- Create equitable teaching schedules that build-in time for collaboration, professional learning communities, and/or instructional coaching. Encourage teacher leadership while respecting workload capacity.
- Provide opportunities for staff to develop positive place attachment to the school and larger community.

According to reports from the MUS Educator Recruitment and Retention Task Force, the MUS campuses worked both independently and collaboratively to address the issues outlined by the SFIC in 2016. For example, Montana State University (MSU) – Bozeman, organized rural practicum experiences in eastern Montana communities and hosts an annual education colloquium with rural superintendents providing opportunities for professional networking. Also, at MSU-Bozeman, between 2014–2016 an endowment was created to provide $7,500 scholarships for pre-service teachers who student teach in rural areas, which is more than a licensed teacher earns in a year through the OPI loan assistance program or the National Board Certified Teacher stipend (Educator Recruitment and Retention Task Force, 2017; OPI, 2020). MSU-Bozeman, the Great Falls College – MSU, the Blackfeet Community College, and the Little Big Horn College are all implementing “grow your own” programs through dual-enrollment courses or partnerships with local high schools (Educator Recruitment and Retention Task Force,

2017; Ewbank, Howard, & McLean, 2019). MSU-Bozeman has also developed and accredited a Master's in the Art of Teaching program which focuses on recruiting rural teachers; there is also a Rural Teacher Initiative. I recommend that these programs remain and that the progress continues to be documented[59] so the findings can inform the state in developing future place-conscious policy initiatives. While the MUS initiatives are addressing teacher preparation and place-consciousness, the state legislature still needs to do more to address the systemic inequalities, such as teacher workloads, funding, and compensation.

In 2019, the Montana Department of Labor and Industry found that teacher preparation programs were meeting the state educator demand. For example, 238 elementary school teachers graduated from the MUS while there were 107 positions available, and 1,118 high school teachers graduated to fill 83 positions (Ewbank et al., 2019). If there is a large surplus of teachers available and rural school districts are still not able to fill their vacancies, then something needs to happen to make the jobs in districts that are hard-to-staff more desirable. The CPDA and interviews from the case study demonstrate that the state legislature needs to provide more funding. Specifically, six out of seven of the teachers interviewed in the case study mentioned workloads, salaries, benefits, and affordable housing as issues that the state and/or school districts need to address. Therefore, the state needs to address the expensive, but important reality of paying teachers as professionals and supporting local rural districts in establishing

[59] Note that initial reports have been published, for example, Mitchell, Olsen, Hampton, Hicks, Long, & Olsen's (2019) peer-reviewed article examining rural practicums and experiences for preservice teachers in the U.S. and Australia.

competitive salary schedules and/or benefits. The state also needs to provide enough funding so that administrators can offer meaningful PD, including induction programs, and staff their schools adequately, so that teacher workloads are manageable.

Future Research

Future research should continue to apply CPDA to examine education policy including local school board minutes, salary schedules, or other district policies, to gain a better understanding of what initiatives school districts are implementing (Stanton, 2019; Taylor, 2004). When I tried to research salary schedules in Montana it was difficult to find information on individual school districts, and there were several national databases that wrote Montana's salary data was unavailable. Therefore, while an analysis of district salary policies could prove challenging the missing documents also suggest a lack of transparency, and I would be interested in exploring why that is. Is it a logistical issue or are there underlying reasons? Finally, it would be interesting to analyze policy proposals that did not become law in Montana, for example, the state health insurance option that failed. This should be further reviewed since benefits affect teacher retention, and other states like Wyoming have passed policies that provide more affordable, competitive health care options for their teachers.

Place-consciousness should be authentically integrated into policy as it provides a lens for stakeholders to better understand teacher experiences, how teachers adapt to their working conditions, and the value of education throughout Montana. It would also be worthwhile to apply different methodologies, metrics similar to those used in the School

and Staffing Survey or the Teaching and Learning International Survey, to further study recruitment and retention in Montana. Montana's most hard-to-staff rural communities, such as tribal communities, also need further attention. While turnover is even higher in these communities, there is a need for specialized cultural knowledge and pedagogy. There are arguments that while these are the schools that often end up with the least qualified teachers, they should be staffed with the most qualified, in order to close the opportunity gap. More attention also needs to be given to place-conscious induction and mentoring programs, including how these programs can be implemented in an authentic way that respects the time and professional capacity of teachers.

Finally, future research should consider other rural countries (Darling-Hammond et al., 2017; Schleicher, 2020) such as Australia (Mason & Matas, 2015; White & Reid, 2008), Canada (Alberta Education, 2015) or New Zealand (New Zealand Ministry of Education, 2016 Aug., 2016, Dec.), rural states (Lavalley, 2018; Showalter et al., 2019) such as Alaska (Adams & Woods, 2015; DeFeo & Tran, 2019; Vinlove, 2016), Wyoming (Wyoming Department of Education, 2012, 2018), or Vermont (Darling-Hammond & Podolsky, 2019), and other Montana schools districts such as the Helena School District salary reform (Moulthrop, Calegari, & Eggers, 2006).

Chapter Summary

In conclusion, the CPDA and interviews with teachers at the Glacier and Yellowstone school sites demonstrate that teachers value the culture of their rural schools while also feeling limited in their capacity with/in the community, especially early career

teachers who may not feel completely trusted or trust the community. This study contributes to the qualitative research focusing on the phenomena of recruitment and retention in rural communities. Applying CPDA to education policy in the context of a case study shows potential to explore future educational issues and the effectiveness of policy in practice. For example, in this study, teachers highlighted a disconnect between the policies intended to support them and the reality of their professional capacity.

School staffing and resources are significantly impacted by a community's economic growth or decline, so local and state funding does not always meet education needs. Innovative solutions such as teacherages are place-conscious examples of how communities address systemic issues of affordable housing. Nonetheless Montana needs to do more to support teachers, such as addressing compensation and working conditions for teachers in rural areas. While doing so, the state needs to apply place-conscious thinking so that the recommendations are consequential and effective long-term (Biddle & Azano, 2016; Darling-Hammond et al., 2017; Gruenwald, 2003a, 2003b; Greenwood, 2019; Schafft, 2016; White & Reid, 2008). I suggest a new framework, the Place-Conscious Social-Ecological Model, to guide future efforts designing education policy, and to provide equality of opportunity for Montana students.

The state has made progress since *Columbia Falls v. State* (2004/2005) in providing adequate funding based on educationally relevant factors, including the revised funding formula, the Quality Educator Loan Assistance Program and stiped for National Board Certified teachers, and partnerships with local school districts as well as the MUS. However, more needs to be done, as is evident in the stories of the rural teachers in this

case study. The Glacier and Yellowstone teachers value their students and the uniqueness of their rural schools—they are calling for help from the state to address systemic inequities. Teachers expressed that equality of opportunity does not currently exist between rural and non-rural schools, although teachers continue to persevere. Place-conscious education policy needs to be developed to address teacher recruitment and retention so that all Montana students are receiving a quality education.

REFERENCES CITED

REFERENCES CITED

2005 Montana Legislature. Senate Bill No 152. Retrieved from http://leg.mt.gov/bills/2005/billpdf/SB0152.pdf

2015 Montana Legislature. Senate Bill No 128. Retrieved from http://leg.mt.gov/bills/2015/billhtml/SB0128.htm

Adams, B., & Woods, A. (2015). A model for recruiting and retaining teachers in Alaska's rural K-12 schools. *Peabody Journal of Education, 90*(2), 250-262. DOI: 10.1080/0161956X.2015.1022115

Administrative Rules of Montana, 10-55-601. Retrieved from https://sosmt.gov/arm/#arm

Administrative Rules of Montana, 10-55-603. Retrieved from https://sosmt.gov/arm/#arm

Administrative Rules of Montana, 10-55-701. Retrieved from https://sosmt.gov/arm/#arm

Administrative Rules of Montana, 10-55-706. Retrieved from https://sosmt.gov/arm/#arm

Administrative Rules of Montana, 10-55-707. Retrieved from https://sosmt.gov/arm/#arm

Administrative Rules of Montana, 10-55-708. Retrieved from https://sosmt.gov/arm/#arm

Administrative Rules of Montana, 10-55-714. Retrieved from https://sosmt.gov/arm/#arm

Alberta Education. (2015). *Alberta teacher workload study*. R.A. Malatest & Associates Ltd. Retrieved from https://education.alberta.ca/media/3114984/teacher-workload-study-final-report-december-2015-2.pdf

Anderson, M., & Lonsdale, M. (2014). Three Rs for rural research: Respect, responsibility, and reciprocity. In S. White & M. Corbett. (Eds.), *Doing educational research in rural settings: Methodological issues, international perspectives and practical solutions* (pp. 193-204). New York, NY: Routledge.

Azano, A. P., & Stewart, T. T. (2015). Exploring place and practicing justice: Preparing pre-service teachers for success in rural schools. *Journal of Research in Rural Education, 30*(9), 1-12.

Berry, W. (1992). *Sex, economy, freedom and community*. New York: Pantheon Books.

Berry, B. (2004). Recruiting and retaining "highly qualified teachers" for hard-to-staff schools. *National Association of Secondary School Principals, NASSP Bulletin,*

88(638), 5-27.

Berry, B., & Shields, P. (2017). Solving the teacher shortage: Revisiting the lessons we've learned. *Phi Delta Kappan, 98*(8), 8-18. https://doi org.proxybz.lib.montana.edu:3443/10.1177%2F0031721717708289

Biddle, C., & Azano, A. P. (2016). Constructing and reconstructing the "rural school problem" A century of rural education research. *Review of Research in Education, 40*(1), 298-325.

Borman, G.D., & Dowling, M.N. (2008). Teacher attrition and retention: A meta-analytic and narrative review of the research. *Review of Educational Research, 78*(3), 367-409.

Bowman, J., Hagener, T., Robinson, T., & Barrett, E. (2015). "Transcript for Episode 16: Paving the Way: The Path to Calling Montana's 1972 Constitutional Convention – In the Crucible of Change". *Crucible Episode Transcripts.* Paper 19. http://digitalcommons.mtech.edu/crucible_transcripts/19

Boyd, D., Grossman, P., Lankford, H., Loeb, S., & Wyckoff, J. (2008). *Teacher preparation and student achievement*. (NBER Working Paper No. 14314). Cambridge, MA: National Bureau of Economic Research.

Brown v. Board of Education, 347 U.S. 483 (1954).

Burkhauser, S. (2017). How much do school principals matter when it comes to teacher working conditions? *Educational Evaluation and Policy Analysis, 39*(1), 126-145.

Carr, P., & Kefalas, M. (2011). *Hollowing out the middle: The rural brain drain and what it means for America*. Boston: Beacon Press.

Carver-Thomas, D., & Darling-Hammond, L. (2019). The trouble with teacher turnover: How teacher attrition affects students and schools. *Education Policy Analysis Archives*, 27(36). http://dx.doi.org/10.14507/epaa.27.3699 This article is part of the special issue, Understanding and Solving Teacher Shortages: Policy Strategies for a Strong Profession, guested edited by Linda Darling Hammond and Anne Podolsky.

Civil Rights Act of 1964, Pub.L. 88-352, 78 Stat. 241 (1964).

Clotfelder, C. T., Ladd, H. F., & Vigdor, J. L. (2007). Teacher credentials and student achievement: Longitudinal analysis with student fixed effects. *Economics of Education Review*, 26(6), 673-682. http://dx.doi.org/10.3386/w12828

Clune, W. (1994). The shift from equity to adequacy in school finance. *Educational Policy, 8*(4), 376-394. DOI

Coleman, J.S., National Center for Education Statistics, & United States. (1966). *Equality of educational opportunity*. U.S. Department of Health, Education, and Welfare, Office of Education. Washington, D.C.: U.S. Government Printing Office, 1-737. Retrieved from https://files.eric.ed.gov/fulltext/ED012275.pdf

Colorado Department of Education. (2019). *School view: School and district data*. Retrieved from https://www.cde.state.co.us/schoolview

Columbia Falls Elem. Sch. Dist. No. 6 v. State, 2004 Mont. Dist. LEXIS 3727, (First Judicial District Court of Montana, Lewis and Clark County April 15, 2004, Filed).

Columbia Falls Elem. Sch. Dist. No. 6 v. State, 2005 MT 69, 326 Mont. 304, 109 P.3d 257, 2005 Mont. LEXIS 79, (Supreme Court of Montana March 22, 2005, Decided).

Columbia Falls Elem. Sch. Dist. v. State, 2008 Mont. Dist. LEXIS 483, (First Judicial District Court of Montana, Lewis and Clark County December 15, 2008, Decided).

Constitution of Montana. (1972). Article X – Education and Public Lands. §1. Retrieved from http://leg.mt.gov/bills/mca/CONSTITUTION/X/1.htm

Corbett, M. (2016). Rural futures: Development, aspirations, mobilities, place, and education. *Peabody Journal of Education, 91*(2), 270-282.

Crabtree, J. (2016). A different path for rural America. *American Journal of Economics and Sociology, 75*(3), 605-622. DOI: 10.1111/ajes.12150

Creswell, J.W. (2013). *Qualitative inquiry & research design: Choosing among five approaches.* (3rd Edition). Thousand Oaks, CA: Sage Publications.

Creswell, J.W., & Creswell, J.D. (2018). *Research design: Qualitative, quantitative, and mixed methods approaches*. (5th Edition). Thousand Oaks, CA: Sage Publications.

Cromartie, J., von Reichert, C., & Arthun, R. (2015). *Factors affecting former residents' returning to rural communities*, ERR-185, U.S. Department of Agriculture, Economic Research Service.

Cubberley, E. (1912). *Rural life and education*. Cambridge, MA: Riverside.

Dahill-Brown, S, & Jochim, A. (2018) The power of place: Rural identity and the politics of rural school reform. In McShane, M.Q. & Smarick, A. (Eds.), *No longer forgotten: The triumphs and struggles of rural education in America (*pp. 59-80). Lanham, Maryland: Rowman & Littlefield.

Dani, D. (2019). A community and place-based approach to middle childhood science teacher education, *Middle School Journal, 50*(2), 45-52, DOI:10.1080/00940771.2019.1576581

Darling-Hammond, L. (2010). *The flat world and education: How America's commitment to equity will determine our future.* New York, NY: Teachers College Press.

Darling-Hammond, L. (2014). Want to close the achievement gap? Close the teaching gap. *American Educator, 38*(4), 14-18. Retrieved from www.huffingtonpost.com/lindadarlinghammond/to-close-the-achievement_b_5542614

Darling-Hammond, L. (2016). Research on teaching and teacher education and its influence on policy and practice. *Educational Researcher*, *45*(2), 83-91. DOI: 10.3102/0013189X16639597

Darling-Hammond, L. (2017). Teacher education around the world: What can we learn from international practice?, *European Journal of Teacher Education, 40*(3), 291-309, DOI: 10.1080/02619768.2017.1315399

Darling-Hammond, L. (2019). Investing for student success: *Lessons from state school finance reforms*. Palo Alto, CA: Learning Policy Institute.

Darling-Hammond, L., & Berry, B. (1999). Recruiting teachers for the 21st Century: The foundation for educational equity. *The Journal of Negro Education, 68*(3), 254-279. Retrieved from https://www-jstor-org.proxybz.lib.montana.edu :3443/stable/2668100

Darling-Hammond, L., Burns, D., Campbell, C., Goodwin, A.L., Hammerness, K., Low, E.L., McIntyre, A., Sato, M., & Zeichner, K. (2017). *Empowered educators: How high performing systems shape teaching quality around the world*. San Francisco, CA; Jossey-Bass.

Darling-Hammond, L., Newton, S., & Wei, P. (2013). Developing and assessing beginning teacher effectiveness: The potential of performance assessments. *Educational Assessment, Evaluation and Accountability, 25*(3), 179-204. DOI 10.1007/s11092-013-9163-0

Darling-Hammond, L., & Podolsky, A. (2019). Breaking the cycle of teacher shortages:

What kind of policies can make a difference? *Education Policy Analysis Archives, 27*(34). http://dx.doi.org/10.14507/epaa.27.4633 This article is part of the special issue, Understanding and Solving Teacher Shortages: Policy Strategies for a Strong Profession, guested edited by Linda Darling-Hammond and Anne Podolsky.

Darling-Hammond, L., & Youngs, P. (2002). Defining "Highly Qualified Teachers": What does "Scientifically-Based Research" actually tell us?. *Educational Researcher, 31*(9), 13-25. Retrieved from https://www.jstor.org/stable/3594491

DeFeo, D. J., & Tran, T. C. (2019). Recruiting, hiring, and training Alaska's rural teachers: How superintendents practice place-conscious leadership. *Journal of Research in Rural Education, 35*(2), 1-17. Retrieved from: https://doi.org/10.26209/jrre3502

Dewey, J. (1900). *The school and society*. Chicago, IL: University of Chicago Press.

Education Commission of the States. (2019). *50-state comparison: K–12 funding: All data points for all states*. Retrieved from https://c0arw235.caspio.com/dp/b7f93000fdfda7e7be064fce9c54

Education Week Research Center. (2016). *Called to account: New directions in school accountability – Montana*. Retrieved from https://www.edweek.org/ew/qc/2016/2016-state-report-cards-map.html

Education Week Research Center. (2019). *Data: U.S. graduation rates by state and student demographics*. Retrieved from https://www.edweek.org/ew/section/multimedia/data-us-graduation-rates-by-state-and.html

Ellig, T. (2009 April 27). *Norm Asbjornson's small town roots shaped his success. Montana State University*. Montana State University. Retrieved from http://www.montana.edu/news/9124/norm-asbjornson-s-small-town-roots-shaped-his-success

Erickson, C. (2006). *Defining and funding a basic system of free quality public elementary and secondary schools: Final report of the Quality Schools Interim Committee.* Legislative Services Division. Retrieved from http://www.mqec.org/school-funding-history/

Ewbank, A., Howard, V., & McLean, A. (2019). *Montana University System: Rural educator recruitment and retention task force*. Presentation for the Office of the Commissioner of Higher Education. Retrieved from https://mus.edu/board/meetings/2019/nov2019/arsa/nov2019-arsa.html

Fairclough, I., and Fairclough, I. (2012). *Political discourse analysis: A method for advanced students*. London, UK: Routledge.

Fairclough, N. (2013). Critical discourse analysis and critical policy studies. *Critical Policy Studies, 7*(2), 177-197, DOI:10.1080/19460171.2013.798239

Ferguson, R.F. (1991). Paying for public education: New evidence on how and why money matters. *Harvard Journal on Legislation, 28*(2), 465-498.

Ferguson, R.F., & Ladd, H.F. (1996). How and why money matters: An analysis of Alabama schools. In H. Ladd (Ed.), *Holding schools accountable* (pp. 265-298). Washington, DC: Brooking Institution.

Foucault, M. (1980). *Power/knowledge: Selected interviews and other writings*. (C. Gordon, Ed.). New York: Pantheon Books.

Fowler, F. (2013). *Policy studies for educational leaders: An introduction.* (4th ed.). Upper Saddle River, New Jersey: Pearson Education Inc.

Freire, P. (2000). *Pedagogy of the oppressed* (30th anniversary ed.). New York: Continuum.

Geiger, T. & Pivovarova M. (2018) The effects of working conditions on teacher retention, *Teachers and Teaching, 24*(6), 604-625, DOI: 10.1080/13540602.2018.1457524

Gibson, I. W. (1994). Policy, practice and need in the professional preparation of teachers for rural teaching. *Journal of Research in Rural Education, 10*(1), 68-77. Retrieved from http://jrre.vmhost.psu.edu/wp-content/ uploads/2014/02/10-1_5.pdf

Glander, M. (2017). *Selected statistics from the public elementary and secondary education universe: School year 2015–16* (NCES 2018-052). U.S. Department of Education. Washington, DC: National Center for Education Statistics. Retrieved [date] from http://nces.ed.gov/pubsearch.

Glanz, K., Rimer, B. K., & Viswanath, K. (2015). *Health behavior: Theory, research, and practice*. ProQuest Ebook Central https://ebookcentral.proquest.com

Golden, S.D., & Earp, J.L. (2012). Social Ecological Approaches to Individuals and Their Contexts: Twenty Years of "Health Education & Behavior" Health Promotion Interventions. *Health Education & Behavior, 39*(3), 364-372.

Greenwood, D. (2019). Place, land, and the decolonization of the settler soul, *The Journal of Environmental Education, 50*(4-6), 358-377, DOI: 10.1080/00958964.2019.1687412

Grimes, L.E., Haskins, N. & Paisley, P.O. (2014). "So I Went There": A phenomenological study on the experiences of rural school counselor social justice advocates. *Professional School Counseling, 17*(1), 40-51.

Gruenewald, D.A. (2003a). Foundations of place: A multidisciplinary framework for place-conscious education. *American Education Research Journal, 40*(3), 619-654, DOI: 10.3102/00028312040003619

Gruenewald, D.A. (2003b). The best of both worlds: A critical pedagogy of place. *Educational Researcher, 32(*4), 3-12. Retrieved from http://www.jstor.org.proxybz.lib.montana.edu/stable/3700002

Gruenwald, D., & Smith, G. (2008). *Place-based education in the global age: Local diversity*. New York: Routledge Taylor & Francis. Group.

Guin, K. (2004, August 16). Chronic teacher turnover in urban elementary schools. *Education Policy Analysis Archives, 12*(42). Retrieved from http://epaa.asu.edu/epaa/v12n42/.

Hanushek, E.A. (1971). Teacher characteristics and gains in student achievement: Estimation using micro-data. *American Economic Review, 61*(2), 280-288. Retrieved from http://hanushek.stanford.edu/publications/teacher-characteristics-and-gains-student-achievement-estimation-using-micro-data

Hanushek, E.A. (1986). The economics of schooling: Production and efficiency in public schools. *Journal of Economic Literature*, *49*(3), 1141-1177. Retrieved from http://hanushek.stanford.edu/publications/economics-schooling-production-and-efficiency-public-schools

Hanushek, E.A. (2016). What matters for student achievement: Updating Coleman on the influence of families and schools. *Education Next, 16*(2), 19-26. Retrieved from http://hanushek.stanford.edu/publications/what-matters-achievement-updating-coleman-influence-families-and-schools

Hanushek, E. A., & Lindseth, A. A. (2009*). Schoolhouses, courthouses, and statehouses: solving the funding-achievement puzzle in America's public schools*. Princeton, NJ: Princeton University Press.

Hanushek, E. A., & Rivkin, S. G. (2004). How to improve the supply of

high quality teachers. In D. Ravitch (Ed.), *Brookings papers on education policy* (pp. 7–25). Washington, DC: Brookings Institution Press. Retrieved from https://doi.org/10.1353/pep.2004.0001

Hanushek, E.A., & Rivkin, S.G. (2006). Teacher quality. In E. Hanushek & F. Welch (Eds.), *Handbook of the economics of education, Volume 2* (pp. 1052-1078). Oxford, UK: North-Holland. DOI: 10.1016/S1574-0692(06)02018-6

Hanushek, E.A., Rivkin, S.G., & Schiman, J.C. (2016). Dynamic effects of teacher turnover on the quality of instruction. *Economics of Education Review*, 55, 132-148. Retrieved from http://hanushek.stanford.edu/publications/dynamic-effects-teacher-turnover-quality-instruction-0

Hattie, J., Masters, D., & Birch, K. (2016). *Visible learning into action: International case studies on impact.* New York, NY: Routledge.

Helena Elementary School District No. 1 v. The State of Montana, 769 P.2d 684 (Mont. 1989) Retrieved from http://leg.mt.gov/content/Publications/fiscal/Education/Helena-Elementary-Decision.pdf

hooks, b. (1984/2015). *Feminist theory: From margin to center* (3rd ed.). New York, NY: Routledge.

Horton, M., & Freire, P. (1990). *We make the road by walking: Conversations on education and social change.* B. Bell, J. Gaventa, & J. Peters (Eds.). Philadelphia, PA: Temple University Press.

Howley, C. B. (2006). Remote possibilities: Rural children's educational aspirations. *Peabody Journal of Education*, *81*(2), 62-80.

Howley, C., & Howley, A. (2010). Poverty and school achievement in rural communities: A social-class interpretation. In Schafft, K. A. & Jackson, A. Y. (Eds.), *Rural education for the twenty-first century: Identity, place, and community in a globalizing world*, (p. 34- 50).

Howley, C., & Howley, A. (2018). How blue was my valley? invited paper for the AERA special interest group on rural education. *Journal of Research in Rural Education (Online), 33*(4), 1-10. Retrieved from https://search-proquest-com.proxybz.lib.montana.edu/docview/2060914542?accountid=28148

Jean, E. (1988). *Montana's system of public school finance: A historical perspective.* Helena, MT: MSBA, Montana School Boards Association.

Ingersoll, R. (1999). The problem of underqualified teachers in American secondary Schools. *Educational Researcher, 28*(2), 26–37. Retrieved from https://repository.upenn.edu/gse_pubs/139

Ingersoll, R. (2001). Teacher turnover and teacher shortages: An organizational analysis. *American Educational Research Journal,* 38(3), 499-534. http://dx.doi.org/10.3102/00028312038003499

Ingersoll, R. M. (2002). The teacher shortage: A case of wrong diagnosis and wrong prescription. *NASSP Bulletin*, *86*(631), 16-31.

Ingersoll, R.M. (2003). Is there really a teacher shortage? Retrieved from University of Washington, Center for the Study of Teaching and Policy website: http://depts.washington.edu/ctpmail/PDFs/Shortage-RI-09-2003pdf

Ingersoll, R.M., May, H., & Collins, G. (2019). Recruitment, employment, retention and the minority teacher shortage. *Education Policy Analysis Archives*, 27, 37.

Ingersoll, R.M., Merrill, E., Stuckey, D, & Collins, G. (2018). Seven trends: The transformation of the teaching force – Updated October 2018. *CPRE Research Reports*. Retrieved from https://repository.upenn.edu/cpre_researchreports/108

Ingersoll, R. M., & Perda, D. (2010). Is the Supply of Mathematics and Science Teachers Sufficient? *American Educational Research Journal, 47*(3), 563–594. https://doi.org/10.3102/0002831210370711

Ingersoll, R. M. & Smith, T. M. (2003). The wrong solution to the teacher shortage. *Educational Leadership*, 60(8), 30-33. Retrieved from http://www.gse.upenn.edu/pdf/rmi/EL_TheWrongSolution_to_theTeacherShortage.pdf

Ingersoll, R.M., & Smith, T.M. (2004). What are the effects of induction and mentoring on beginning teacher turnover? *American Educational Research Journal, 41*(3), 681-714.

Ingersoll, R. & Strong, M. (2011). The impact of induction and mentoring programs for beginning teachers: A critical review of the research." *Review of Education Research, 81*(2), 201-233. DOI: 10.3102/0034654311403323

Jean, E. (1988). *Montana's system of public school finance: A historical perspective*. Montana: Montana School Boards Association.

Juneau, S. (2013). History and foundation of American Indian education. *Montana Office of Public Instruction.* (Revised and Updated by Walter Fleming & Lance Foster).

Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/Indian%20Education/Indian%20Education%20101/History_FoundationAmindianEd.pdf

Kaden, U., Patterson, P.P., Healy, J., & Adams, B.L. (2016). Stemming the revolving door: Teacher retention and attrition in arctic Alaska schools. *Global Education Review, 3*(1), 129-147.

Kahrs, B. (2011). *The influence of mentoring relationships on novice K–12 teachers' experiences*. (Publication No. 3439359) [Doctoral dissertation, Walden University]. ProQuest Dissertations Publishing.

Keesler & Schneider (2010). *Estimating cause: Teacher turnover and school effectiveness in Michigan*. Paper presented at the annual conference of the Society for Research on Educational Effectiveness, Washington, DC.

Kendrick, T., & Cresswell, K. (2017). 2017 study of gaps in college access and success programming in Montana. *Reach Higher Montana*. Retrieved from http://test.reachhighermontana.org/about/materials/RHM-Gap-Analysis.pdf

Krasnoff, B. (2014). Teacher recruitment, induction, and retention. *Northwest Comprehensive Center at Education Northwest*.

Kudryavtsev, A., Stedman, R.C., & Krasny, M.E. (2012). Sense of place in environmental education. *Environmental Education Research, 18*(2), 229-250.

Ladd, H. F. (2011). Teachers' perceptions of their working conditions: How predictive of planned and actual teacher movement? *Educational Evaluation and Policy Analysis, 33*(2), 235-261.

Lavalley, M. (2018). Out of the loop: Rural schools are largely left out of research and policy discussion, exacerbating poverty, inequity, and isolation. *Center for Public Education.* https://education.wsu.edu/documents/2018/12/center-public-education-rural-schools-report.pdf/

Lefebvre, H., Elden, S., Brenner, N., & Moore, G. (2009). *State, space, world: Selected essays.* Minneapolis: University of Minnesota.

Malkus, N. (2018) A statistical portrait of rural education in America. In M.Q. McShane & A. Smarick (Eds.), *No longer forgotten: The triumphs and struggles of rural education in America (*pp. 9-28). Lanham, Maryland: Rowman & Littlefield.

Malone, M., Roeder, R., & Lang, W. (1991). *Montana: A history of two centuries* (Rev. ed.). Seattle: University of Washington Press.

Manzo, L.C. (2005). For better or worse: Exploring multiple dimensions of place meaning. *Journal of Environmental Psychology 25*(1), 67–86.

Marzano, R. (2017). *The new art and science of teaching (More than fifty new instructional strategies for academic success).* Bloomington, IN: Solution Tree Press.

Mason, S., & Matas, C. P. (2015). Teacher attrition and retention research in Australia: Towards a new theoretical framework. *Australian Journal of Teacher Education, 40(*11). http://dx.doi.org/10.14221/ajte.2015v40n11.3

Maxwell, J.A. (2013). *Qualitative research design: An interactive approach***.** (3rd Edition). Thousand Oaks, CA: Sage Publications.

McCracken, P. (2015). *Montana K-12 funding from 50,000': Prepared for the School Funding Interim Commission*. School Funding Interim Commission. Retrieved from https://leg.mt.gov/content/Committees/Interim/2015-2016/School-Funding/Meetings/Sept-2015/Montana-school-funding-50,000'.pdf

McCracken, P. (2016). *Measuring rurality and school isolation in Montana: Possibilities for targeting state assistance to support recruitment and retention.* School Funding Interim Commission. Retrieved from http://leg.mt.gov/content/Committees/Interim/2015-2016/School-Funding/Meetings/Apr-2016/Rurality-school-isolation.pdf

McCracken, P., & VanBrown, N. (2018 March). *Montana school funding 101 and 201: A workshop for the Education Interim Committee*. Retrieved from https://leg.mt.gov/content/Committees/Interim/2017-2018/Education/Meetings/Mar-2018/School%20funding%20presentation%20REVISED.pdf

McLaren, P.L. & Giroux, H.A. (1990). Critical pedagogy and rural education: A challenge from Poland. *Peabody Journal of Education, 67*(4), 154-165. DOI:10.1080/01619569009538705

McShane, M., & Smarick, A. (2018). *No longer forgotten: The triumphs and struggles of rural education in America.* Lanham: Rowman & Littlefield.

Merrill, A. (1992). *The Montana School Foundation Program and state equalization aid: A legislative and financial history, 1949-1991*. Montana Legislative Council, Retrieved from https://leg.mt.gov/content/Publications/fiscal/Education/School-Funding-Policy-1992.pdf

Mertens, D.M. (2003). Mixed methods and the politics of human research: The

transformative-emancipatory perspective. In A. Tashakkori & C. Teddlie (Eds.), *SAGE handbook of mixed methods in social & behavioral research* (pp. 135-164). Thousand Oaks, CA: Sage.

Mitchell, T.R., Holton, B.C., & Lee, T.W. (2001). How to keep your best employees: Developing an effective retention policy. *The Academy of Management Executive, 15(*4), 96-109.

Monk, D. (2007). Recruiting and retaining high-quality teachers in rural areas. *The Future of Children, 17*(1), 155-174.

Mont. Code Ann. § 20-7-101 (2019), Retrieved from https://leg.mt.gov/bills/mca/index.html

Mont. Code Ann. § 20-9-309 (2019), Retrieved from https://leg.mt.gov/bills/mca/index.html

Mont. Const. art. X, § 1. Retrieved from https://leg.mt.gov/bills/mca/Constitution/X/1.htm

Montana Legislature. (2017 August). *School funding maps*. Prepared by Pad McCracken for the Education Interim Committee. Retrieved from http://leg.mt.gov/content/Committees/Interim/2017-2018/Education/Meetings/Aug-2017/Explanation%20of%20School%20Funding%20Maps.pdf

Montana Office of Public Instruction. (2005). *2005 59th legislative session summary of legislation related to K-12 education.*

Montana Office of Public Instruction. (2005). *2005 special legislative session summary of legislation related to K-12 education.*

Montana Office of Public Instruction. (2007). *2007 60th legislative session summary of legislation related to K-12 education.*

Montana Office of Public Instruction. (2009). *2009 61st legislative session summary of legislation related to K-12 education.* Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/Legislation/17JuneLegislativeSummary.pdf?ver=2017-08-17-114112-153

Montana Office of Public Instruction. (2011 June). *2011 62nd legislative session summary of legislation related to K-12 education.* Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/Legislation/17JuneLegislativeSummary.pdf?ver=2017-08-17-114112-153

Montana Office of Public Instruction. (2013) *Critical quality educator shortages: Identification of schools and licensure and endorsement areas impacted by Critical Quality Educator Shortages for the 2013-14 school year*. Prepared by Madalyn Quinlan & Linda Atwood.

Montana Office of Public Instruction. (2013 June). *2017 63rd legislative session summary of legislation related to K-12 education.* Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/Legislation/17JuneLegislativeSummary.pdf?ver=2017-08-17-114112-153

Montana Office of Public Instruction. (2015 June). *2015 64th legislative session summary of legislation related to K-12 education.* Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/Legislation/17JuneLegislativeSummary.pdf?ver=2017-08-17-114112-153

Montana Office of Public Instruction. (2017 June). *2017 65th legislative session summary of legislation related to K-12 education.* Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/Legislation/17JuneLegislativeSummary.pdf?ver=2017-08-17-114112-153

Montana Office of Public Instruction. (2018) *Critical quality educator shortages: Identification of schools and licensure and endorsement areas impacted by Critical Quality Educator Shortages for the 2018-19 school year*. Prepared by Scott Furois.

Montana Office of Public Instruction. (2018). GEMS: Student characteristics, Summary enrollment report. Retrieved from https://gems.opi.mt.gov/StudentCharacteristics/Pages/SummaryEnrollmentReport.aspx

Montana Office of Public Instruction. (2018 Feb*.). FY 2019 General Fund budget overview and worksheets.* Retrieved from https://saom.memberclicks.net/assets/Headlines-and-Features/2018-19%20General%20Fund%20Budget%20Overview%20Worksheets.pdf

Montana Office of Public Instruction. (2018). Understanding Montana school finance and school district budgets. *School Finance Division*. Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/School%20Finance/Accounting/Guidance%20and%20Manuals/Tax%20Credits%20for%20Educational%20Donation/FY%202017/Understanding%20Montana%20School_Finance_FY_2018.pdf?ver=2018-06-04-101519-957

Montana Office of Public Instruction. (2019). *Quality Educator Loan Assistance FAQs: What is an "impacted school"?* Retrieved from

http://opi.mt.gov/Educators/Licensure/Educator-Recruitment-Retention/Quality-Educator-Loan-Assistance-FAQs

Montana Office of Public Instruction. (2019 Nov.). *Critical quality educator shortages: Identification of schools and licensure and endorsement areas impacted by the Critical Quality Educator Shortages in the 2019-2020 school year.* Retrieved From https://gems.opi.mt.gov/SchoolStaffing/Documents/Critical_Quality_Educator_Shortages.pdf

Montana Office of Public Instruction. (2019 June). *2019 66th legislative session summary of legislation related to K-12 education.* Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/Legislation/17JuneLegislativeSummary.pdf?ver=2017-08-17-114112-153

Montana Office of Public Instruction. (2020). *Understanding Montana School Finance and School District Budgets*. Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/School%20Finance/Accounting/Guidance%20and%20Manuals/Tax%20Credits%20for%20Educational%20Donation/FY%202017/Understanding%20Montana%20School_Finance_FY_2018.pdf?ver=2018-06-04-101519-957

Montana Office of Public Instruction. (2020) *Critical quality educator shortages: Identification of schools and licensure and endorsement areas impacted by Critical Quality Educator Shortages for the 2019-20 school year*. Prepared by Scott Furois, Danielle Murphy, & Ken Bailey. Retrieved from http://opi.mt.gov/Portals/182/Page%20Files/Educator%20Recruitment%20and%20Retention/Critical_Educator_Shortage_Report.pdf

Montana University System. (2020). *Educator Recruitment and Retention Taskforce*. Presentation for the Office of the Commissioner of Higher Education. Retrieved from https://mus.edu/board/meetings/2017/Mar2017/ARSA/Rural_Educator_A1.pdf

Montana University System. (2020). *Montana rural physician incentive program*. Retrieved from https://mus.edu/Prepare/Pay/Loans/2020-MRPIP-Application.pdf

National Center for Frontier Communities. (2014). *Frontier maps*. Retrieved from http://frontierus.org/maps/

National Commission on Teaching and America's Future. (2016). *What matters now: A new compact for teaching and learning.* Retrieved from https://nctaf.org/research/what-matters-now/

Native Land. (2020). *Map*. Retrieved from https://native-land.ca/

New Zealand Ministry of Education, New Zealand Post Primary Teachers' Association, New Zealand School Trustees Association, & New Zealand Education Council. (2016 Aug.). *Secondary teacher supply working group report*. Retrieved from https://www.education.govt.nz/assets/Uploads/Secondary-Teacher-Supply-Working-Group-Report-9-August-2016.pdf

New Zealand Post Primary Teachers' Association, New Zealand Education Council, New Zealand Qualification Authority, New Zealand School Trustees Association, & New Zealand Ministry of Education. (2016 Dec). *Secondary teacher workload working group report.* Retrieved from https://www.education.govt.nz/assets/Documents/School/working-in-a-school/Secondary-Teacher-Workload-Working-Group-Report.pdf

Nielson, D.B. (2001). *Who will teach Montana's children?* Montana State Board of Public Education. Retrieved from https://files.eric.ed.gov/fulltext/ED455983.pdf

Nielson, D.B. (2002). *Who will teach Montana's children? 2002 follow-up study*. Montana Board of Public Education. Retrieved from https://bpe.mt.gov/Portals/119/PDF/WhoWillTeachMontanaChildren.pdf

Odden, A.R., & Piccus, L.O. (2014). *School finance: A policy perspective*. (5th Ed). New York, NY: McGraw Hill.

Opper, I. M. (2019). *Teachers matter: Understanding teachers' impact on student achievement*. Santa Monica, CA: RAND Corporation. Retrieved from https://www.rand.org/pubs/research_reports/RR4312.html.

Pattin, J. (2020). *Property tax revenues in Montana*. Montana Legislative Fiscal Division. Retrieved from https://leg.mt.gov/content/Publications/fiscal/2021-Interim/Jan-2020/Prop-Tax-Report.pdf

Player, D., & Husain, A. (2018) Staffing America's rural schools. In M.Q. McShane & A. Smarick (Eds.), *No longer forgotten: The triumphs and struggles of rural education in America (*pp. 117-134). Lanham, Maryland: Rowman & Littlefield.

Quality Schools Interim Committee. (2005). *Defining and funding a basic system of free quality public elementary and secondary schools*. Legislative Services Division. Retrieved from http://leg.mt.gov/content/publications/committees/interim/2005_2006/qualityschools.pdf

Radcliffe, M., Burd, C., Holder, K., & Fields, A. (2016 Dec.). Defining rural at the U.S. Census Bureau: American community survey and geography brief. *United States Census Bureau.* Retrieved from https://www.census.gov/content/dam/Census/

library/publications/2016/acs/acsgeo-1.pdf

Ravitch, D. (2013). *Reign of error: The hoax of the privatization movement and the danger to America's public schools.* New York: Knopf.

Reagan, E.M., Hambacher, E., Schram, T., McCurdy, K., Lord, D., Higginbotham, T., & Fornauf, B. (2019). Place matters: Review of the literature on rural teacher education. *Teaching and Teacher Education, 80*, 83-93.

Rebell, M. (2009). *Courts & kids: Pursuing educational equity through the state courts*. Chicago, IL: University of Chicago Press.

RISE4Montana. (2016). *Semi-annual report: Midyear reflections on challenges, opportunities and progress to date.* Retrieved from http://mt-pec.org/rise4mt/rise4mt-semi-annual-report

Roeder, R. (1990). The 1972 Montana Constitution in historical context. *The Montana Law Review, 51*(2), 260-269. Retrieved from https://scholarship.law.umt.edu/mlr/vol51/iss2/4

Ronfeldt, M., Loeb, S., & Wyckoff, J. (2013). How Teacher Turnover Harms Student Achievement. *American Educational Research Journal, 50*(1), 4–36. https://doi.org/10.3102/0002831212463813

Rooks, D. (2018). The unintended consequences of cohorts: How social relationships can influence the retention of rural teachers recruited by cohort-based alternative pathway programs. *Journal of Research in Rural Education, 33*(9), 1-22. Retrieved from https://doi.org/10.18113/ P8JRRE3309

Saldaña, J. (2016). *The coding manual for qualitative researchers*. Log Angeles, CA: Sage Publications Ltd.

Schafft, K. A. (2010). Economics, community, and rural education. In K.A. Schafft & A.Y. Jackson (Eds.), *Rural education for the twenty-first century: Identity, place, and community in a globalizing world* (p. 275-289). University Park, Pennsylvania: The Pennsylvania State University Press.

Schafft, K.A. (2016) Rural education as rural development: Understanding the rural school–community well-being linkage in a 21st-century policy context, *Peabody Journal of Education, 91*(2), 137-154, DOI:10:1080/0161956X.2016.1151734

Schafft, K.A., & Jackson, C. (2010). Rural education and community in the twenty-first century. In K.A. Schafft & A.Y. Jackson (Eds.), *Rural education for the twenty-first century: Identity, place, and community in a globalizing world* (pp. 1-13).

University Park, Pennsylvania: The Pennsylvania State University Press.

Schleicher, A. (2020). *Teacher and learning international (TALIS) survey 2018: Insights and interpretations.* OECD. http://www.oecd.org/education/talis/TALIS2018_insights_and_interpretations.pdf

Schmitt-Wilson, S., Downey, J., & Beck, A.E. (2018). Rural education attainment: The importance of context. *Journal of Research in Rural Education, 33*(1), 1-14.

School Funding Interim Commission. (2016). *A report to the 65th Legislature by the 2015-2016 School Funding Interim Commission: K–12 school funding*. Prepared by Pad McCracken, Laura Sankey, & Katya Grover. Montana Legislature, Legislative Services Division. Retrieved from https://leg.mt.gov/content/Publications/Committees/interim/2015-2016/SFC-REPORT.pdf

Showalter, D., Hartman, S., Johnson, J., & Klein, B. (2019). Why rural matters, 2018-2019: The time is now. *The Rural School and Community Trust*.

Schuler, E.J. (2020). Place-based innovations for rural education: An introduction to volume 10, issue 1 of TPRE. *Theory & Practice in Rural Education, 10*(1), 2-5.

Schulte, A.K. (2018). Connecting to students through place. *The Rural Educator, 39*(2), 13-20. Retrieved from http://epubs.library.msstate.edu/index.php/ruraleducator

Shuls, J.V. (2018) School finance in rural America. In M.Q. McShane & A. Smarick (Eds.), *No longer forgotten: The triumphs and struggles of rural education in America (*pp. 99-116). Lanham, Maryland: Rowman & Littlefield.

Sims, N.L. (1946). *Elements of rural sociology*. New York: Thomas Y. Crowell.

Stanton, C. R. (2019). Educational Manifest Destiny: Exclusion, Role Allocation, and Functionalization in Reservation Bordertown District Admission Policies. *American Journal of Education, 125*(2), 201-229.

State of Montana. (2017). Montana Code Annotated 2017: Title 20. *Legislative Services Division.* Retrieved from https://leg.mt.gov/bills/mca/title_0200/chapter_0090/part_0030/section_0090/0200-0090-0030-0090.html

State of Montana. (2018). MCA contents – Help – 2017 edition. *Legislative Services Division.* Retrieved from https://leg.mt.gov/bills/mca/help.htm

Stoddard, C., & Young, D. (2005). *Recruitment, retention and salaries of teachers and other school personnel in Montana.* Bozeman, MT: Montana State University.

Retrieved from https://leg.mt.gov/content/Committees/interim/2005_2006/qual_schools/RecruitmentReport.pdf

Sutcher, L., Darling-Hammond, L., & Carver-Thomas, D. (2016). *A coming crisis in teaching? Teacher supply, demand, and shortages in the U.S.* Palo Alto, CA: Learning Policy Institute. Retrieved from https://learningpolicyinstitute.org/product/coming-crisis-Teaching

Sykes, G., & Martin, K. (2019). Equitable access to capable teachers: The states respond. *Education Policy Analysis Archives, 27*(39). http://dx.doi.org/10.14507/epaa.27.3743 This article is part of the special issue, *Understanding and Solving Teacher Shortages: Policy Strategies for a Strong Profession*, guested edited by Linda Darling-Hammond and Anne Podolsky.

Taylor, S. (2004). Researching educational policy and change in 'new times': Using critical discourse analysis. *Journal of Education Policy, 19*(4), 433-451.

Theobald, N.D. (1990). An examination of the influence of personal, profession, and school district characteristics on public school teacher retention. *Economics of Education Review, 9*(3), 241-250.

Theobald, P. (2005). Urban and rural schools: Overcoming lingering obstacles. *Phi Delta Kappan, 87*(2), 116-122. Retrieved from https://search-proquest-com.proxybz.lib.montana.edu:3443/docview/218471330?accountid=28148

Theobald, P. & Wood, K. (2010). Learning to be rural: Identity lessons from history, schooling, and the U.S. corporate media. In K.A. Schafft & A.Y. Jackson (Eds.), *Rural Education for the Twenty-First Century: Identity, Place, and Community in a Globalizing World* (17-33). University Park, Pennsylvania: The Pennsylvania State University Press.

Tieken, M.C. (2014). *Why rural schools matter*. Chapel Hill, NC: The University of North Carolina Chapel Hill.

Tran, H., & Dou, J. (2019). An exploratory examination of what types of administrative support matter for rural teacher talent management: The rural educator perspective. *ICPEL Education Leadership Review, 20*(1), 133-149.

U.S. Census Bureau, 2010 Census of Population and Housing, *Population and housing unit counts*, CPH-2-28, Montana U.S. Government Printing Office, Washington, DC, 2012a. Retrieved from https://www.census.gov/prod/cen2010/cph-2-28.pdf

U.S. Census Bureau, 2010, *Statistical abstract of the United States: 2012*, U.S.

Government Printing Office, Washington, DC, 2012b. Retrieved from https://www2.census.gov/library/publications/2011/compendia/statab/131ed/2012-statab.pdf

U.S. Census Bureau, 2013, *Regional offices*. Last revised 11 March 2020. Retrieved from https://www.census.gov/about/regions.html

U.S. Census Bureau, 2019, *Quickfacts: Montana*. Retrieved from https://www.census.gov/quickfacts/fact/table/MT/PST045219

United States Department of Agriculture: Economic Research Service. (2017). *Rural education, At a glance.* Retrieved from https://www.ers.usda.gov/webdocs/publications/83078/eib-171.pdf?v=9647.1

United States Department of Agriculture: Economic Research Service. (2018 June 7). *Rural economy and population.* Retrieved from https://www.ers.usda.gov/topics/rural- economy-population/

United States Department of Agriculture: Economic Research Service. (2019). *Rural America at a glance*. Retrieved from https://www.ers.usda.gov/webdocs/publications/95341/eib-212.pdf?v=3036.9

Urban, W.J., & Wagoner, J.L. (2014). *American education: A history* (5th ed.). New York, NY: Routledge.

Vanclay, F. (2008). Place matters. In F. Vanclay, M. Higgins, & A. Blackshaw (Eds.), *Making sense of place. Exploring concepts and expressions of place through different sense and lenses* (pp. 3–11). Canberra: National Museum of Australia Press.

Vinlove, A. (2016). Place, positionality, and teacher preparation. *Journal for Sustainability Education*, 11, 2-16

Warren, K., & Cheney, J. (1991). Ecological feminism and ecosystem ecology. *Hypatia, 6*(1), 179-197. doi:10.1111/j.1527-2001.1991.tb00216.x

Watson, J.M. (2018). Job embeddedness may hold the key to the retention of novice talent in schools. *Educational Leadership Administration: Teaching and Program Development, 29*(1), 26-43.

White, S., & Corbett, M. (Eds.) (2014). *Doing educational research in rural settings: Methodological issues, international perspectives and practical solutions.* London, England: Routledge.

White, S., & Reid, J. (2008). Placing teachers? Sustaining rural schooling through place-consciousness in teacher education. *Journal of Research in Rural Education, 23*(7). Retrieved from http://jrre.psu.edu/articles/23-7.pdf

Winchester, Ben (2012). Continuing the trend: The brain gain of the newcomers, A generational analysis of rural Minnesota migration, 1990 – 2010. *Minneapolis: University of Minnesota Extension Center for Community Vitality*.

Yarrow, A., Ballantyne, R., Hansford, B., Herschell, P., & Millwater, J. (1999). Teacher in rural and remote schools: A literature review. *Teaching and Teacher Education, 15*(1), 1-13.

Yin, R.K. (2018). *Case study research and applications: Design and methods*. (6th Edition). London, UK: SAGE Publications.

Yoon, S.Y., Mihaly, K., & Moore, A. (2019). *A snapshot of educator mobility in Montana: Understanding issues of educator shortages and turnover.* Portland, OR: Education Northwest, Regional Educational Laboratory Northwest.

APPENDICES

APPENDIX A

IRB EXEMPT APPLICATION

MONTANA STATE UNIVERSITY
Request for Designation of Research as Exempt from the Requirement of Institutional Review Board Review
(06/01/2015)

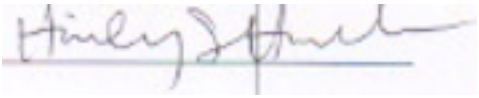
****
THIS AREA IS FOR INSTITUTIONAL REVIEW BOARD USE ONLY. DO NOT WRITE IN THIS AREA.
Confirmation Date:
Application Number:
****

DATE: November 19, 2018

I. INVESTIGATOR:
Name: Hailey Hancock
Department/**Complete** Address: Reid Hall 234M - Montana State University, Bozeman MT 59717-2880
Telephone: 406 570 0744
E-Mail Address: haileyhancock@montana.edu
DATE TRAINING COMPLETED: March 15, 2015 *[Required training: CITI training; see website for link]*

Name of Faculty Sponsor (if above is a student; also must complete CITI training):

Christine Rogers Stanton
DATE TRAINING COMPLETED: *[Required training: CITI training; see website for link]*

SIGNATURE (INVESTIGATOR or ADVISOR): 
11/19/2018

(If more than one investigator, repeat information for all investigators or team members.)

II. TITLE OF RESEARCH PROJECT: A CASE STUDY OF STATE POLICY IMPACTING EARLY CAREER TEACHER RECRUITMENT, PROFESSIONAL DEVELOPMENT, AND RETENTION IN RURAL SCHOOL DISTRICTS

III. BRIEF DESCRIPTION OF RESEARCH METHODS (also see section VII). If using a survey/questionnaire, provide a copy with this application. **If you are planning**

on posting flyers, posters, etc. anywhere on Campus, you must check with the building managers and/or departments located in MSU buildings and obtain their approval prior to the posting.

IRB Exempt Application Worksheet	
III. BRIEF DESCRIPTION OF RESEARCH METHODS (also see section VII). If using a survey/questionnaire, provide a copy with this application.	
1. What is the purpose of the study? Why is it important?	This exploratory sequential mixed methods case study focuses on Montana's history of providing adequate and equitable funding, so that all K-12 students have the equal opportunity to pursue a quality public education. This study will specifically explore the impact of policy and research on practice to better understand the recruitment, development, and retention of new and veteran teachers in rural contexts. This is important because Montana has been revising their funding models since 1985 when 64 school districts filed a lawsuit against the State "claiming that the funding of the education system in Montana, guaranteed under the Montana Constitution, was unconstitutional." (Montana Office of Public Instruction, 2016, p. 11) While funding today may be more equitable and adequate in Montana, recruitment and retention of highly qualified teachers remains an issue in Montana. The quality of education is questioned when Montana schools are not able to recruit and retain highly qualified teachers. If highly qualified teachers are not equitably distributed among Montana schools then Montana may not be providing an adequate education and may not be fulfilling its constitutional obligation.
2. Briefly describe the goals and procedures for your study?	The priority of this study is to better understand the praxis of policies with teacher recruitment, professional development, and retention in rural

	contexts. The results of this study could have potential policy implications including suggestions to redesign or fund teacher recruitment, professional development, and retention. The procedures of this study include: first, conducting a literature review on the history of K-12 education in Montana; second, analyzing political documents/court cases relating to issues of teacher recruitment, professional development, and retention in Montana; third, interviewing, observing, transcribing, and analyzing conversations with education stakeholders.
3. Why was this site chosen? How is it important to the work?	Montana was chosen as the state of study because it is where the researcher lives. I chose the sample school district I am interviewing based on their geographic location and criteria such as being impacted by the HQT shortage. Their identities will be protected. It is important that I interview teachers, and possibly administrators or school board members, so I can have a better understanding of how education stakeholders in Montana interpret and enact state policies regarding teacher recruitment, professional development and retention.
4. How will individuals be recruited?	I will be emailing the Superintendents of several school districts and/or their secretary at their work to schedule an introductory meeting.
5. Will any characteristics of the group pose special risk?	There are no special risks.
6. Will you collect sensitive information? If so, what safe guards are in place to ensure confidentiality?	There is no sensitive information being collected other than names, and those will changed to pseudonyms or codes to protect their identity.
7. How will the research be explained to the individuals? Will the individuals receive compensation?	I will begin my explanation of the research study by introducing myself as a student and explaining why I want to learn more about the topic of quality

	education. I will present my consent form and how I would like to compensate them for their time.
8. What will the research accomplish and how will it benefit the individuals?	The research will help me better understand the issue(s) of teacher recruitment, professional development, and retainment in rural contexts. If the results show that school districts are already implementing policies to recruit, professionally develop, and retain highly qualified teachers' this study will celebrate that. If the results of the study show that districts have different criteria for recruitment, professional development and retention, or that there is no support from the state or local school boards to help struggling districts, this study could provide an impetus for change.
9. Where will the surveys or interviews take place? Specific location?	The interviews will occur at the place of work of the interviewee or on the MSU campus.
10. How long will the interviews or survey last?	Each interview should last about an hour.
11. How will data be recorded, stored, and maintained? For how long (Include Dates)?	The data will be recorded using an audio-recorder, and then transferred to my MSU Box Account. Names and all identifying markers will be removed from the transcription. I will definitely store the interviews through at least May 5th, 2017 when this class officially ends. Then I may continue to store the interviews using the MSU Box Account through 2019/2020 and beyond for the duration of my tenure at MSU.
12. How will the results be used?	The results will be shared in my dissertation, academic papers, and at academic presentations.

IV. RISKS AND INCONVENIENCES TO SUBJECTS (also see section VII; **do not answer 'None'**):

The teachers, administrators, and school board members take a slight risk by expressing their professional opinions about quality education since they are public figures. While I

am putting procedures in place that protect their identity, if the public were to find out who I interviewed, and disagreed with their thoughts there could be repercussions. Also, the education stakeholders may find my use of their time an inconvenience, but I hope they will see value in this study.

V. SUBJECTS:

A. Expected numbers of subjects: 3 - 10

B. Will research involve minors (age <18 years)? Yes **No**
(If 'Yes', please specify and justify.)

C. Will research involve prisoners? Yes **No**

D. Will research involve any specific ethnic, racial, religious, etc. groups of people?
(If 'Yes', please specify and justify.) Yes **No**

E. Will a consent form be used? (Please use accepted format from our website. Be sure to indicate that participation is voluntary. Provide a stand-alone copy. Do not include the form here.)

Yes, a consent form will be used, and it is attached to the end of this application.

VI. FOR RESEARCH INVOLVING SURVEYS OR QUESTIONNAIRES:
(Be sure to indicate on each instrument, survey or questionnaire that participation is voluntary.)

A. Is information being collected about:
Sexual behavior? Yes **No**
Criminal behavior? Yes **No**
Alcohol or substance abuse? Yes **No**
Matters affecting employment? Yes **No**
Matters relating to civil litigation? Yes **No**

B. Will the information obtained be completely anonymous, with no identifying information linked to the responding subjects? **Yes** No

C. If identifying information will be linked to the responding subjects, how will the subjects be identified? (Please circle or bold your answers)
By name Yes **No**
By code **Yes** No
By other identifying information Yes **No**

D. Does this survey utilize a standardized and/or validated survey tool/questionnaire? Yes **No**

VII. FOR RESEARCH BEING CONDUCTED IN A CLASSROOM SETTING: **Not applicable**

A. Will research involve blood draws? (If Yes, please follow protocol listed in the "Guidelines for Describing Risks: blood, etc.", section I-VI.)

VIII. FOR RESEARCH INVOLVING PATIENT INFORMATION, MATERIALS, BLOOD OR TISSUE

SPECIMENS RECEIVED FROM OTHER INSTITUTIONS: **Not applicable**

A. Are these materials linked in any way to the patient (code, identifier, or other link to patient identity)? Yes No

B. Are you involved in the design of the study for which the materials are being collected? Yes No

C. Will your name appear on publications resulting from this research? Yes No

D. Where are the subjects from whom this material is being collected?

E. Has an IRB at the institution releasing this material reviewed the proposed project? (If 'Yes", please provide documentation.) Yes No

F. Regarding the above materials or data, will you be:
Collecting them Yes No
Receiving them Yes No
Sending them Yes No

G. Do the materials already exist? Yes No

H. Are the materials being collected for the purpose of this study? Yes No

I. Do the materials come from subjects who are:
Minors Yes No
Prisoners Yes No

Pregnant women Yes No

J. Does this material originate from a patient population that, for religious or other reasons,
would prohibit its use in biomedical research?
Yes No Unknown source

IX. FOR RESEARCH INVOLVING MEDICAL AND/OR INSURANCE RECORDS – **Not applicable**

A. Does this research involve the use of:
Medical, psychiatric and/or psychological records Yes No
Health insurance records Yes No
Any other records containing information regarding personal health and illness Yes No

If you answered "Yes" to any of the items in this section, you must complete the HIPAA Worksheet.

SUBJECT CONSENT FORM FOR PARTICIPATION IN HUMAN RESEARCH AT MONTANA STATE UNIVERSITY

A CASE STUDY OF STATE POLICY IMPACTING EARLY CAREER TEACHER RECRUITMENT, PROFESSIONAL DEVELOPMENT, AND RETENTION IN RURAL SCHOOL DISTRICTS

Hailey Hancock, Researcher
Reid Hall 234M, Bozeman MT 59717-2880
406-570-0744, haileyhancock@montana.edu

You are being asked to participate in a research study designed to further explore the effect of policy and research on practice to better understand the recruitment, professional development, and retention of K-12 teachers in rural contexts. Results from this study will provide insight into how the state and local school districts support or do not support teachers in providing a quality education for all students. Data will be collected through semi-structured interviews and observations. This data will be analyzed in conjunction with interviews and observations from other study participants, as well as analysis of political documents, to identify common themes of teacher recruitment, professional development, and retention in Montana.

If you agree to participate in this study you will be asked to participate in several semi-structured interviews regarding your experiences related to teacher recruitment, professional development and retention. The interview(s) will be audio-taped and the observation(s) will be video-taped. The recorded interviews and observations will then be transcribed verbatim and any information that might identify you personally will be removed from the transcription. Only the interviewer will have access to the tapes from your interviews and observations. A copy will be provided to you, upon request, for review and further comment.

Your participation in this research is voluntary. You are free to stop participating in the research at any time, or to decline to answer any specific questions. **Your participation in this research study is confidential**. The transcription of your interview will be identified by a code number and this number will not be connected with your name in any fashion. If information you disclose is uniquely identifiable, this information will not be disclosed. There are no foreseen risks to participation in this research study.

If you have any questions regarding this research project you can contact me at 406-570-0744. Any additional questions about the rights of human subjects can be answered by the Chair of the MSU Human Subjects Committee, Mark Quinn, (406) 994-4707, mquinn@montana.edu.

AUTHORIZATION: I have read the above and understand the discomforts, inconvenience and risk of this study. I, _____, agree to participate in this research. I understand that I may later refuse to participate, and that I may withdraw from the study at any time. I have received a copy of this consent form for my own records.

Participant Signature: _____

Investigator Signature: _____

Date: _____

APPENDIX B

SAMPLING SPECIFICATIONS

		Selection Strategies	
	Data Sources	**Type of Sampling**	**Rationale**
1	Document - Montana District Court Case: *Columbia Falls Elementary School District No. 6 v. The State of Montana* (2004)	Criterion; Politically important	This public record provided an argument for defining quality education in Montana. The judge ruled in favor of the plaintiffs finding that school finance was not adequate in Montana.
2	Document - Montana Supreme Court Case: *Columbia Falls Elementary School District No. 6 v. The State of Montana* (2005)	Criterion; Politically important	This public record provided an argument for defining quality education in Montana. The Montana Supreme Court upheld the District Courts decision.
3	Document – Montana District Court Case: *Columbia Falls v. The State of Montana* (2008)	Criterion; Politically important	This public record ruled in favor of the defendant – the State was making progress in providing adequate funding for a quality education.
4	Document – Government policy: Montana School Accreditation Standards and Procedures (2013) Manual (ARM, 10.55.601, 10.55.603, 10.55.701, 10.55.706, 10.55.707, 10.55.708, and 10.55.714)	Intensity; Politically important	This public record conceptualized what is required of school districts to provide a basic, free, public quality elementary and secondary education in Montana.
5	Montana Code Annotated – Accreditation and Curriculum, 20-7-10, and Funding of Basic System of Quality Public Schools, 20-9-309	Intensity; Politically important	The excerpts from MCA, 20-7-10, outlined the responsibilities of the State in regard to accreditation and curriculum. The excerpts from MCA, 20-9-309, outlined the responsibilities of the State in regard to adequately funding the school system based on educationally relevant factors.
6-15	Legislative Summaries – Summary of Legislation	Criterion; Politically important	This public record prepared by the Office of Public Instruction

	Related to K-12 Education (2003, 2005, 2005 Special Session, 2007, 2009, 2011, 2013, 2015, 2017, 2019)		summarizes every bill that became law during the legislative session. I am using this as opposed to each individual, original legislation because I am not a legal expert; the language used in the summaries is more applicable and readable.
16	Study – The School Funding Interim Commission (2016)	Criterion	This study was commissioned by the State of Montana to review the issues of teacher recruitment and retention.
17	Semi-structured interviews and observations with teachers from two sample school districts	Stratified purposeful	I will interview teachers who work at rural schools that are impacted by the critical quality educator shortage; this sample is also geographically convenient because Montana is such a large physical area.

Type of Sampling: Miles & Huberman (1994, p. 28) as cited in Creswell, 2013, p. 158

APPENDIX C

SEMI-STRUCTURED INTERVIEW QUESTIONS

Research Questions and Sub-questions[60]	Sources of Evidence Used to Answer the Question	Interview Questions	
		Focus on Values	**Focus on Policies**

(RQ1) Is the State fulfilling its responsibility to provide equality of educational opportunity to students in rural schools through supporting teacher recruitment and retention?	• Semi-structured interviews
	• Possibly observations
	• Discourse analysis
	  ○ District policies
	  ○ Legislative summaries
	  ○ Political documents
	  ○ Studies on recruitment and retention
		• Did you grow up in the community where you are teaching?
		• If so, why did you come back?
		• If not, describe where you grew up. How is it similar and different than where you currently teach?
		• Can you describe what your pre-service teacher education was? Would you describe it as traditional or alternative? Describe how well do you feel it prepared you to teach where you currently are (for example: classroom management, planning instruction, assessment, etc.).
		• How long have you been teaching?
		• How long have you been in this school district?
		• Why did you decide to work at this school?
		• Do you currently live in the same place/town as your school? Why or why not?
		• What are the assets of this community? What are the challenges?
			• In 2005, the Montana Supreme Court ruled that the states funding for K-12 education was not adequate, therefore, some districts were not able to provide a quality education. The court ordered that the legislature revise their funding model and further define a quality K-12 education…
			• To your knowledge, are there Montana policies that support the recruitment of highly qualified teachers?
			  ○ How does this apply to rural schools specifically?
			• To your knowledge, are there Montana policies that support the professional development of highly qualified teachers?
			  ○ How does this apply to rural schools specifically?
			• To your knowledge, are there Montana policies that support the retention of highly qualified teachers?
			  ○ How does this apply to rural schools specifically?
			•

[60] These are how the research questions were worded at the time. They were revised during the process.

		• What makes this school and the larger community unique? • How well do you feel supported to do your job? Can you provide examples of ways that you feel supported or not supported, including but not limited to funding for curriculum and instructional materials? • How effective do you feel the state or local policies are in recruiting high-quality teachers to your school? • How effective do you feel the state or local policies are in professionally developing high-quality teachers to your school? • How effective do you feel the state or local policies are in retaining high-quality teachers to your school? • Have you been personally impacted by any of these state or local district policies? Can you share your experience? • Is there anything else you would like to share?	
(RQ2) What have been the outcomes, in terms of adequate support	• Semi-structured interviews • Possibly observations	• How would you define a quality education?	• What state or district policies impact teacher recruitment, professional

(funding, curricula, and accreditation) for teacher recruitment and retention in sample Montana rural school districts since the initial *Columbia Falls v. State of Montana* (2004/2005) decision?
 	
(RQ2A) How has state policy affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?
 	
(RQ2B) How has local policy, as perceived by practicing K–12 teachers, affected teacher recruitment and retention and addressed teachers' professional capacity to provide a quality education in sample Montana rural school districts?
	• Discourse analysis
	  ○ District policies
	  ○ Legislative summaries
	  ○ Political documents
	  ○ Studies on recruitment and retention
		• In what ways do you believe your district is providing a quality education?
		• In what ways could your district improve their quality of education?
		• Do you believe school districts need more support from the state in providing a quality education?
		  ○ If so, what suggestions do you have?
		• Have you been involved in any mentoring or induction programs in this school district or other districts?
		• If so, can you share your experience?
		• What went well? What would you change?
		• Do you feel like the mentoring and/or induction program improved your teaching? Why?
		• Do you feel like the mentoring and/or induction program impacted you staying or leaving? Why?
		• Provide at least three reasons why you are planning on staying or leaving. Which is most significant? Why?
		• Do you feel like recruitment, professional development, and retention are effective
			development and/or retention?
			  ○ Can you provide examples?
			• How does the state support school districts in providing a quality education?
			  ○ Do you feel like this is effective? Why or why not?
			• How does the district support teachers in providing a quality education?
			  ○ Do you feel like this is effective? Why or why not?
			• How do the salary, benefits, and retirement packages compare to other districts?
			  ○ Do you feel that your districts compensation (retirement, benefits) is sufficient? Why or why not?
			  ○ Could you see yourself relocating in the future? Why or why not?

		in your district? Why or why not? • Is there anything else you would like to share?	

(RQ3)* How does state and district funding, directed specifically for teachers, affect recruitment, professional development, and retention in Montana? Examples include, but are not limited to, salaries, health or insurance benefits, and incentives such as bonuses for National Board Certified Teachers or loan forgiveness?
 	
(RQ3A)* How does funding of districts vary by the rurality of a district (i.e. fringe, distant, or remote), and how does that affect teacher recruitment, professional development, and retention?
 	
*Both RQ3 were eliminated later.
	• Semi-structured interviews
	• Quantitative data analysis
	  ○ OPI GEMS Database
	  ○ MT School Board Association
	  ○ Census data
	  ○ NCES data
		• If you have been in your district multiple years, how have recruitment, retention, and salary trends changed or not changed?	Not applicable

APPENDIX D

FOLLOW-UP QUESTIONNAIRE FOR INTERVIEW PARTICIPANTS

1. **Are you a Nationally Board-Certified (NBC) teacher?**
   Link: https://www.nbpts.org/national-board-certification/
   If NO, move to question 2. If YES, please answer the follow up questions below. If a follow up question does not apply to you leave it blank or write NA.

   a. What is your certification in?
   b. For how many years have you had this certification?
   c. Have you received any financial stipends for achieving National Board Certification? If so, how much have your received in total: $1500; $2500; $2501-$5000; $5000-$7500; more than $7500 or list the total amount ___
      i. If you have received stipends for NBC was it from your local district or the State of Montana? *I ask this because the NBC stipend does not always receive funding from the State legislature.
   d. If you received a stipend for NBC how do you feel about this statement: *"The stipend is one reason why I pursued and maintain National Board Certification"*. Do you: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree.

   Rationale for this question: If you have achieved National Board Certification you are eligible for an annual stipend from the state that ranges from $1500-$2500 (SB 115, 2017). The 2019 Legislature approved funds for these stipends through Fiscal Year 2021. More information on applying for the stipend: https://opi.mt.gov/Educators/National-Board-Certification-for-Teachers

2. **Have you received support from the state of Montana via the Quality Educator Loan Assistance Program?** (Revised in 2019).
   If NO, move to question 3. If YES, please answer the follow up questions below. If a follow up question does not apply to you leave it blank or write NA.

   a. During what year(s) did you receive assistance?
   b. Approximately what is the total amount of assistance you have received as of August 2019? Since this is personal, I provided a range of options or you may write in the total amount: $1-$3000; $3001-$7000; $7001-$12000; another amount, $ ___
   c. If you received Quality Educator Loan assistance, how do you feel about this statement: *"The loan assistance is one reason why I stay where I teach"*.
      Do you: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree.

   Rationale for this question: If you teach in a school that is impacted by the "Critical Educator Shortage" (per OPI each school year, usually released in November) then new teachers at your school may qualify for this loan assistance. I am not sure how it works for veteran teachers, who could still benefit from this or qualified in the past. The full text of HB 211 (2019) which renewed and revised the Quality Educator Loan Assistance

Program can be found here https://leg.mt.gov/bills/2019/billpdf/HB0211.pdf. Information on applying is forthcoming; in the past applications were due in April of the relevant school year.

3. **Have you received education loan assistance from federal government programs (such as, but not limited to, the Perkins Loan Program, Public Service Loan Forgiveness (PSLF) Program, or Teacher Loan Forgiveness Program)?**
If NO, move onto question 4. If YES, please answer the follow up questions below. If a follow up question does not apply to you leave it blank or write NA.

    a. What loan forgiveness program(s) are you enrolled in?
    b. During what year(s) did you receive financial assistance, or do you anticipate receiving the assistance (for example: you may receive the loan forgiveness after you work for five years at your current school in your current position).
    c. Approximately what is the total amount of assistance you have received as of August 2019 or anticipate receiving on ___ (date)? Since this is personal, I provide a range of options or you may write in the total amount: less than $3000; $3001-6000; $6001-$9000; $9001-$12,000; $12,001-$15000; more than $15000; another amount, $___
    d. If you receive(d) federal loan assistance, how do you feel about this statement: *"The federal loan assistance is one reason why I stay where I teach".*
    Do you: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree.

4. **Have you received local financial assistance from your current district (professional development, financial assistance towards a graduate degree, housing assistance, or cost of living adjustments, etc.)?**
If NO, you are done. If YES, please answer the follow up questions below. If a follow up question does not apply to you leave it blank or write NA.

    a. During what year(s) did you receive financial assistance from your current district for professional development (in-house or out-of-district)? Professional development is defined as "structured professional learning that results in changes in teacher practices and improvements in student learning" (Source: https://learningpolicyinstitute.org/product/effective-teacher-professional-development-report). This may include, but is not limited to, mentoring/induction programs, conferences, in-person or virtual trainings, etc.
        a. Approximately what is the total amount of assistance you have received as of August 2019 for professional development? Since this is personal, I provide a range of options or you may write in the total amount: $1-500; $501-$1000; $1001-$1500; $1501-$2000; more than $2001; another amount, $___

i. You may break of up assistance into in-house or out-of-district
ii. You may not know in-house costs, but may know that your district paid $300 for conference registration, etc. Provide as much as you remember.

b. If you know, describe whether the funding came from the district, a district foundation, or a grant.
c. If you received financial assistance from your current district for professional development, how do you feel about this statement: *"The professional development is one reason why I stay where I teach."*
    i. Do you: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree.

b. During what year(s) did you receive financial assistance from your current district towards <u>a graduate degree or other degree?</u>
    a. Please list the degree (for example: BA in Secondary Science or Masters in the Art of Teaching) and the year you completed it or anticipate completing it.
    b. Approximately what is the total amount of assistance you have received as of August 2019 for furthering your education? Since this is personal, I provide a range of options or you may write in the total amount: less than $1000; $1001-2000; $2001-$3000; $3001-$4000; $4001-$5000; more than $5000; another amount, $___
        i. If you know, describe whether the funding came from the district, a district foundation, or a grant.
    c. If you received financial assistance from your current district towards a graduate degree or other degree, how do you feel about this statement: *"The financial assistance for graduate or other degrees, is one reason why I stay where I teach."*
        i. Do you: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree.

c. During what year(s) did you receive financial assistance from your current district for <u>housing assistance?</u>
    a. Please describe the type of housing assistance you received (i.e. the district helped me find affordable housing which was discounted by % or the district gave me money towards a down payment when buying a house).
    b. Approximately what is the total amount of assistance you have received as of August 2019 for housing? Since this is personal, I provide a range of options or you may write in the total amount:

less than $1000; $1001-2000; $2001-$3000; $3001-$4000; $4001-$5000; more than $5000; another amount, $___

i. If you know, describe whether the funding came from the district, a district foundation, or a grant.
ii. If you received financial assistance from your current district towards housing, how do you feel about this statement: *"The financial assistance for housing, is one reason why I stay where I teach."*
1. Do you: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree.

d. During what year(s) did you receive financial assistance from your current district for <u>a cost of living adjustment?</u>
   a. If you receive a cost of living adjustment, was it a part of your annual contract or a one-time payment? Was it negotiated by your teacher's union?
   b. Approximately what is the total amount of assistance you have received as of August 2019 for cost of living? Since this is personal, I provide a range of options or you may write in the total amount: less than $1000; $1001-2000; $2001-$3000; $3001-$4000; $4001-$5000; more than $5000; another amount, $___
      i. If you know, describe whether the funding came from the district, a district foundation, or a grant.
   c. If you received financial assistance from your current district towards cost of living, how do you feel about this statement: *"The financial assistance towards cost of living adjustments, is one reason why I stay where I teach."*
      i. Do you: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree.

e. Are there are other financial incentives your district has provided since you worked there such as a stipend for moving costs? If so, please describe those.
   a. If you know, describe whether the funding came from the district, a district foundation, or a grant.
   b. If you received "miscellaneous" financial assistance from your current district, how do you feel about this statement: *"The financial assistance from my district, is one reason why I stay where I teach."*
      i. Do you: Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree.

If you have any further comments, suggestions or questions regarding the federal, state or local financial assistance that you have received while working at your

current Montana school district please provide that in this email or schedule a call with Hailey.

APPENDIX E

CODEBOOK

Top level code	Sub code	Definition
Accreditation / Curriculum		
	achievement	how local districts and the state measure student learning
	basic system (according to MCA and ARM)	per-student classroom non-licensed teachers misassigned teachers accredited program (accreditation) accreditation standards building operations and maintenance special education transportation capital project school facility payment/ debt service Indian Education for All total cost
	certification	how a teacher is licensed; what grade and/or content area they are legally allowed to teach
	curriculum and instruction	the content and methods used to teach students
	educators	synonym for teacher
	highly-qualified teacher (HQT)	focusing of MT Office of Public Instruction (OPI) definition and programs supporting the highly qualified teacher shortage (HQTS)
Community		this primarily focuses on teacher perceptions of community (people coming together physically or virtually) however it also includes legal definitions such as school districts
	attributes of school	Could include positives and/or challenges (systems or lack of

		systems, workload) of working in school; Leadership or Admin
	attributes of (rural) town	According to study participants, what are the positives and/or challenges of living in a rural town or small town; rural is a key concept here
Public education policies (also govt. levels, branches)		
	Federal	Not used often; may refer to national legislation such as No Child Left Behind; may also refer to federal court cases
	Local (District)	In Montana local school boards have control over the implementation of curriculum and instruction as long as it aligns with the state standards; there is a perception of "local control" about funding as well
	private funding	PTO's, foundations
	school board	just being mentioned; in vivo
	State	MT's legislature meets every other year, but special committees meet during the interim
Recruitment of teachers		Why the teachers initially worked in their district; what the hiring process was like
Retention of teachers		Describing the situation in their district; how many teachers/admin stay or leave; why do they stay or leave; what is the turnover
The importance of place		Gruenewald's dimensions, 2003a and 2003b
	ecological	Power and systems [the environment - physical and human]; grounded in bioregionalism and feminism

	ideological	Power and ideology [cultural, political or religious]
	perceptual	Power and perceptions [insider v. outside, direct experience shapes beliefs about place] Perceptions of place impact what stakeholders prioritize.
	political	Power and politics [political influence on teaching and schools, economic influences of education policy]
	sociological	Power and culture [attributes of community, school, region] Education always exists in a cultural context.
Values		Values "[are] the importance we attribute to ourselves, another person, thing or idea. They are the principles, moral codes, and situational norms people live by" (Daiute, 2014, p. 69 as cited in Saldana p. 131) Often there are four categories of values: democratic, economic, general social, and self-interest.
	adequate / adequacy	Adequacy is defined in school finance terms as requiring "that each district receive sufficient funding to enable it to provide each child with an education that reaches a certain level of quality" (Odden and Picus, 2014, p. 19).
	economic	According to Fowler (2013) economics [in general] is a self-interest value
	economic efficiency	An economic value. Economics efficiency as "accountability or standards" (Fowler, 1995, p. 41) OR "efficiency means obtaining the best possible return on an expenditure or investment. Closely related terms are cost-effectiveness and output maximization" (Fowler, 2013, p. 100). "Over the years, education policy experts have agreed that

		efficiency is one of the most important values driving U.S. education policy (Boyd, 1984; Guthrie, 2002; Kahne, 1996 as cited in Fowler, 2013 p. 100).
	economic growth	An economic value. Economic growth as relating to the development of "skills the work force needs to support the economy's growth at a desired pace" (Swanson, 1989, p. 275 as cited in Fowler, 1995, p. 41) OR
	equitable / equity	A democratic value also associated with social justice and economics; For this study, equity will be interchangeable with equality of opportunity since that is an essential phrase of the Montana Constitution. Fowler (2013) writes that “Equal opportunity exists when everyone has a similar chance to get a good education or find a decent job, regardless of race, sexual orientation, handicapping condition, age, or national origin” (p. 97).
	fraternity	A democratic value; "the recognition of a common bond producing a sense of unity, community, and nationhood" (Swanson, 1989, p. 274 as cited in Fowler, 1995, p. 41) - not a neighborhood or special group, but a "national community, based on a sense of shared citizenship" - this could apply to state and local 'citizenship'
	individualism	A general social value; "one of the most fundamental American ideas" (Fowler, 2013, p. 92). "Valuing individualism means both tending to consider the single person and his or her needs before those of the group, and emphasizing self-reliance" (p. 94)

	liberty	A democratic value; "the right to act as one chooses" (Swanson, 1989 as cited in Fowler, 1995, p. 40)
	order	A general social value; allows humans to "live in an environment in which they are relatively safe from physical harm and in which their property is relatively secure… explicitly or implicitly, then, the high value that most Americans - including practicing educators - place on orderly schools is always an important influence on education policy" (Fowler, 2013, p. 94)
	power	According to Fowler (2013), power is a self-interest value, where both individuals and groups act to increase their power (economic, social, political, etc.)
	quality	Listed by Fowler as an economic value since it is often used to measure business productivity; however, they recognize it as a humanistic philosophical value too; closely related to terms such as excellence and high standards.