

THE MASSACHUSETTS EDUCATION REFORM ACT OF 1993
RESEARCH AND EVALUATION MAPPING PROJECT

PREPARED FOR:

The Massachusetts Education Reform Review Commission
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The Massachusetts Education Reform Act (MERA) of 1993 is a comprehensive piece of legislation intended to substantially improve the quality of K-12 education in the Commonwealth. It calls for sweeping changes in many areas including curriculum and instruction, educational finance, assessment and testing, teacher preparation, and governance and decision-making. The many components of the legislation appear to have been intended to work synergistically to bring about substantial changes in educational practices and outcomes. Hundreds of millions in extra state dollars have been appropriated by the state legislature and the Governor in support of the financial provisions guaranteeing a foundation budget for each district designed to promote equity. Six years after passage of the legislation and with the period of full implementation of the special funding provisions nearly completed, it is time to ask if the law is having its intended effects--if the quality of education is actually improving. It is time for evaluation.

This document outlines a process for thinking about evaluating MERA. It provides a schematic chart or “map” of MERA that makes it possible to keep the whole and the various parts in continuous perspective. For all of the major policy initiatives and mandates of MERA, this report suggests implementation and evaluation questions and provides notes on data collection and methodology. It also poses evaluation questions for MERA as a comprehensive legislative initiative. Finally, this document suggests a five-year plan for keeping track of MERA implementation and evaluation. We hope that this work will serve as a tool for the Education Reform Review Commission that is both conceptually helpful for thinking about evaluation of MERA and practically useful by sorting implementation and evaluation questions; connecting the questions to specific policies within MERA; providing suggestions for data collection and analysis; and proposing a five year research and evaluation plan.

It is also important to note what this document does not do. It does not report the results of specific evaluation studies, nor does it contain fully elaborated research designs. The study team believes that evaluation(s) of MERA are very much needed

by policymakers and educational practitioners in the Commonwealth at the present time. No single piece of legislation as comprehensive or complex as MERA should be expected to “get-it-right” in every detail the first time around, and there are bound to be fine tuning and even more sizable modifications needed to ensure that education reform continues to suit the needs of the Commonwealth. Conducting evaluations and even planning the details of specific studies, however, were beyond the scope of this project. We tried to keep our focus on the big picture and construct a map to guide evaluation decisions for the whole of MERA.

This report has been prepared by a study team of faculty and graduate students at the University of Massachusetts Amherst whose names appear below. The team met weekly for two hours from February through May 1999 to discuss MERA and matters of evaluation. It required much trial and error but the study team was determined to develop a simple map that would encompass all the major policy provisions of MERA. All members of the team contributed to the map, but I wish to give special thanks to John Schneider and Annie McKenzie, Research Fellow and Research Assistant at the Center for Education Policy respectively, for their unflagging efforts in the construction of the map and their good humor in keeping the faculty focused on essentials.

The study team has prepared this report for the use of the Education Reform Review Commission. We tried to keep the Commission’s mandate “to monitor progress toward education reform”¹ and its specific charge with respect to MERA foremost in our thinking. We interpret the legislation to give the Review Commission two important responsibilities, the first is to monitor the implementation of the various policy provisions in the legislation to ensure that legislative intent has been followed by the education establishment, the second is to engage in policy analysis, recommending modifications for MERA or new legislation where policies fall short of their objectives. We hope that the effort to create a conceptual map for MERA that

¹ Section 70 of Chapter 71 of the Acts of 1993 as amended by section 510 of Chapter 151 of the Acts of 1996.

focuses on educational policy and includes implementation and evaluation questions will help the Review Commission as it works on behalf of educational reform for the Commonwealth.

Organization and Structure of Map: Strategic Goals #1--#5

The study team could find no single document that spoke specifically to the goals or intentions of the legislature in promulgating MERA. This is unfortunate because policies are most often evaluated in terms of the extent to which they achieve the purposes or goals of those who established them. We did find, however, a very useful document prepared by the Department of Education² which outlined the following five strategic goals for MERA and then used the goals to organize implementation activities:

- 1. Ensure standards and programs for students that ensure high achievement**
- 2. Establish a fair and equitable system of school finance**
- 3. Reform school and district governance to improve student learning**
- 4. Enhance the quality and accountability of all school personnel, and**
- 5. Introduce new models of school organization, finance, and parental participation.**

The study team believes that these five goals can serve as reasonable proxies of legislative intent because they seem to capture the spirit of the comprehensive legislation, the major provisions, and the overriding concern for student learning and achievement. They are used here, therefore, as the primary organizing framework for the map. Specific educational policies contained in MERA are sorted to correspond to one of these five goals. In many cases a specific policy could have easily been connected to two or even three of the goals, but we have placed them on the map under the goal where the correspondence is the closest. For each educational policy,

² Massachusetts Department of Education (1994). **First Annual Education Reform Implementation Report**. Malden, MA: Author.

then, the map includes a specific reference to the relevant section of Chapter 71 of the Acts of 1993, a very brief summary of the legislation, a number of questions designed to clarify the status of implementation, a set of evaluation questions and, finally, some suggestions for data collection.

We have drawn a distinction between implementation and evaluation questions for several reasons. First, although full implementation of many of the policies contained in MERA is actually quite complicated, questions about the status of implementation are fairly straightforward and answers to the status of implementation questions should be readily attainable from the Department of Education. While implementation requires actions at the district, school, and even classroom and individual levels, these actions should be documented in various regularized reports which can be aggregated by the Department. Second, it is very important that the extent of implementation be clearly known as the first step in any evaluation effort or else the evaluation results run the risk of confusing the problems that may be inherent in a policy with problems arising from incomplete or inadequate implementation. Third, status of implementation affects the timing and potentially the content of evaluation studies. For many areas, full implementation needs to have been achieved before evaluation should begin; in others, as long as the status of implementation is known, evaluation could begin. Finally, analysis of the answers to questions posed in this column of the Map should help the Education Reform Review Commission monitor the progress of educational reform.

The evaluation questions on the map include those the study team felt would be of greatest interest to the Education Reform Review Commission in connection with their policy analytic responsibilities. Although by no means exhaustive, the questions will serve as effective starting points for evaluation efforts. While the study team recognizes that many educational policies in the Commonwealth could benefit from evaluation studies, we have tried to keep our focus on questions that relate directly to MERA as a law which embodies education policy for the Commonwealth. The map proceeds from the assumption that the results of evaluation efforts could

lead the Education Reform Review Commission to make recommendations for reaffirmation, reconsideration, or alteration of the educational policies contained in MERA and/or to directives for the Department of Education or some other level of the education establishment.

To answer evaluation questions we suggest three primary methods for gathering the data that we believe will provide the most informative answers. These are (1) using existing state documents and reports, (2) implementing surveys, questionnaires, and interviews, and (3) psychometric and longitudinal studies. The study team considered other mechanisms typically used in evaluation but concluded that the three approaches would yield data that can be gathered in a reasonable and efficient manner. In this regard, a short description about each approach is in order.

Using existing state documents and reports is self-evident. For example, considerable data about adjustments to district foundation budgets, district profiles of MCAS scores, and teacher certification patterns and profiles can be garnered from state documents or other computer-based repositories. These data should be current and reliable. It would be worthwhile, however, for the Review Commission to consider issues of access, availability, data format, and confidentiality before these data sets are used for policy analytic purposes. Additionally, it should be possible for the Review Commission to ask that specific questions and requests for additional information useful for evaluation purposes be added to the reports already generated on a regular basis for the Department of Education. For example, the Review Commission could ask that the Department of Education obtain quite specific information about how foundation funds are used in support of education reform as part of regular reporting from school districts to the Department and it could ask further that the Department annually report such information to the Commission.

Many of the evaluation questions are best approached by implementing surveys or questionnaires, or interviewing appropriate practitioners. Survey techniques offer significant advantages because they can help reveal attitudes, beliefs,

experiences or activities of respondents. And they can do so economically because many state, district and local education personnel can be reached at one time with each responding to a common set of items phrased in the same way. Many of the evaluation questions suggested in the map could be combined into one instrument and administered among districts and schools yearly, or in a lagged manner. The most serious issues to consider when using these techniques are related to the respondents themselves and to what extent they represent their role in education reform. Selecting appropriate samples (whether random or stratified) of respondents to surveys, questionnaires, and interviews is a critical step. Without careful a priori planning, sampling error could undermine the faith consumers have about the impact of MERA.

A number of other research design, data collection and sampling issues must be considered as well in survey research. Serious consideration must be given to the complex relationship between local schools and their districts; between districts; and between schools, districts and overall state level performance indicators. Modeling these relationships can be accomplished with the advent of statistical techniques that control for the “nested dependence” of schools within districts and that can also stabilize the relationship between districts before comparisons are made. Such “modeling” needs to be organized prior to implementing all data collection techniques.

We use the term psychometric or longitudinal study to indicate when the study team decided that the only way the evaluation question could be legitimately answered was through studies which start by hypothesizing about the relationship between current accountability requirements of MERA and the capacity of these accountability indicators to predict future performance of students. Such designs are require that data be collected over a period of time to prove or disprove the hypothesized relationship. Among researchers these are typically referred to as “predictive validity” studies. They are especially important for evaluations of high stakes testing situations where results will be used to make decisions about continuation in a study program, graduation, or employment.

Evaluating MERA as a Whole: Strategic Goal #6

As noted above, this report organizes the many educational policies contained in MERA to correspond to one of five strategic goals. The study team also considered, however, the question of how to evaluate MERA as a whole. We were particularly interested in the synergistic and interactive effects of the various policy areas and how they work together to contribute to educational reform. Although there is nothing in the legislation per se that states that synergy is the intent of the framers, it seems to us that the underlying logic of comprehensive legislative packages such as MERA, and those in other states, is to create the momentum for genuine, long term change by making simultaneous innovations in a number of key policy elements. It is important, then, to ask if this strategy is working. For example, does it benefit the Commonwealth to pursue curricular change, financial equity, and teacher quality (to select only three key elements) together or would it be best to “fix” one problem at a time through policy modifications. It is recognized that evaluating MERA as a whole will be a difficult. In the real-world, “messy” arena of education it has always been difficult to conduct elegant experimental designs controlling all variables or to hold to the linear causation logic of much social research, but the numerous and simultaneous policy changes required by MERA add even greater complexity to the task. The study team recognizes the difficulty but also recognizes that the Education Reform Review Commission needs to concern itself with this level of policy analysis.

The study team wanted to approach the subject in the same “mapping” format used for other policy considerations. In order to do this we posed a sixth goal: **Ensure that MERA policy initiatives work together to promote education reform and school improvement.** We believe that this goal is consistent with the underlying logic of the legislation. The policy components for this goal are exactly the same components that make up goals 1-5 but the implementation and evaluation questions all shift the focus and ask either about MERA as a comprehensive piece of legislation or about the interactive effects between and among the various component policies of

MERA. We believe that these are among the most important questions in the “map” and of particular relevance to the Education Reform Review Commission.

They also lead to several suggestions for data collection that may be of particular interest to the Commission because they have the potential of bringing together many of the earlier data collection suggestions. The study team believes that it would be possible to develop a set of indicators of progress toward educational reform that could be monitored through regularized data collection and analysis. What we have in mind is an annual report prepared for the Review Commission by the Department of Education that tracks progress along several dimensions agreed to in advance as indicative of educational improvement. The dimensions should include not only trends in MCAS scores but also graduation rates, indices of teacher quality and professional development, financial support for education reform, involvement of superintendents and principals with education reform efforts, parental involvement and so forth. Development of the indicators is beyond the scope of this project because it would require agreements among the key policy makers and practitioners about what would constitute appropriate and quantifiable measures as well as a careful look at the current data collection activities of schools, districts and the Department of Education. Although it would take time and effort to develop appropriate indicators, the study team believes that it would be worth the effort over the long run for the Commission and for the Commonwealth.

A second suggestion is that the Review Commission plan for more in depth evaluation of related sets of educational policies on a regular, cyclical basis. For example, all policies related to teacher quality, professional development and preparation could be evaluated at the same time. During this phase, many of the survey, interview, and focus group studies suggested in this report could be undertaken and results could be analyzed across related policy areas. This would also be a time for examining policy developments and experiences in other states and for a careful look to determine if new legislation or modifications to MERA are needed, or if changes are needed in implementation rules and regulations. We have suggested

that in-depth evaluation of policies could occur in five broad areas that roughly correspond to the goals that have been used to organize this conceptual map: school finance; teacher development, school leadership, and school governance; curriculum, standards, and assessment of learning; school accountability; and state-level education reform initiatives. During the in-depth review of state level education reform initiatives, the work in the other areas would be revisited to determine if changes to MERA as a comprehensive education reform package are needed and/or substantially new components need to be added. A Web-based forum for gathering suggestions and ideas and for broad-based dissemination of study results would help make this process broadly inclusive of the educational community.

All of these suggestions could be incorporated into a five-year research and evaluation plan. A schematic rendering for such a plan appears in the final section of this report. The study team suggests that the Education Reform Review Commission consider adopting such a plan. It draws together many of the suggestions for data collection and evaluation for educational policies that appear in the map in relation to the first five goals, and it would make it possible to focus both on the component parts of MERA and on MERA as a whole. A five year evaluation plan could help the Review Commission justify the need for resources to support research and evaluation studies; help keep those studies which are funded tightly focused on the relevant policy questions and issues facing the Commonwealth; and clearly connect evaluation results to changes in legislation or other policy mandates. We believe it would be consistent with the role and mandate of the Education Reform Review Commission.

The study team has enjoyed working on this map and hopes that it will prove useful to the Education Reform Review Commission. The Education Policy Center appreciates the opportunity to engage an interesting and lively group of faculty and graduate students in considering one of the most important policy documents of the Commonwealth of Massachusetts. We stand ready to assist the Commission and the Commonwealth in future endeavors on behalf of educational improvement.

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STRATEGIC GOAL #1: Ensure standards and programs for students that ensure high achievement.

EDUCATIONAL POLICY	SUMMARY	KEY IMPLEMENTATION QUESTIONS	KEY EVALUATION QUESTIONS	EVALUATION DATA COLLECTION SUGGESTIONS
<p>Establish a Common Core of Learning. <i>Section 29</i></p>	<p>The common core consists of statewide educational goals for all public schools in the Commonwealth.</p>	<ul style="list-style-type: none"> • Has the common core of learning been established? • How is the common core articulated and communicated to teachers, administrators, students, and parents? • How is the common core integrated into classroom instruction? How is the common core being integrated into teacher training programs? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • Do framers of the Common Core find it to be successfully embodied in the curricular frameworks? Is there ongoing evaluation and review of the common core and statewide educational goals? Is there a process for revising and updating the common core and statewide educational goals to include divergent perspectives? <p><u>District Level</u></p> <ul style="list-style-type: none"> • Does the common core readily translate into curriculum and instructional practices? • What is the predictive validity of the common core for preparing students for post-secondary education and employment? 	<p>Conduct interviews with state policymakers and review existing state documents.</p> <p>Questionnaires followed by interviews of school district personnel. This is a psychometric evaluation question requiring longitudinal study and analysis at a later date.</p>
<p>Establish curriculum frameworks and student academic standards <i>Sections 29 and 85</i></p>	<p>Requires DOE to develop academic standards and curriculum frameworks in the core subjects— mathematics, science and technology, history and social science, English, foreign language and the arts. Curriculum frameworks must 1) guide and inform teaching and learning, 2) professional development, and 3) certification and evaluation. Frameworks should be designed to 1) avoid perpetuating gender, cultural, and racial stereotypes, 2) reflect sensitivity to different learning styles and abilities.</p> <p>Establishes 1) competency determination, 2) certificate of advanced mastery, and 3) certificate of occupational proficiency. Students will be required to pass the competency determination in order to graduate from high school.</p>	<ul style="list-style-type: none"> • Have the frameworks been established in all core subjects? • Are copies of the frameworks available to teachers, administrators, college faculty and parents? • How is DOE supporting school and district efforts to align curriculum with frameworks? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • What subjects are represented in the frameworks and why? • What procedures have been established to revise and update the frameworks? <p><u>District Level</u></p> <ul style="list-style-type: none"> • Are the core subjects suitable for all grade levels? How are curriculum, teaching, common core and frameworks aligned? What are the apparent effects of the frameworks on teaching? What are teachers' perceptions of the frameworks? To what degree do the frameworks guide the design, implementation, and outcomes of instructional practice? 	<p>Review existing state documents.</p> <p>Conduct interviews with state policymakers and review existing state documents.</p> <p>Questionnaires followed by interviews of school district personnel.</p>

<p>Evaluate and define instructional time and develop a plan to extend the school day. <i>Section 80</i></p>	<p>Establishes a commission to study and recommend a plan to extend the time during which students attend school.</p>	<ul style="list-style-type: none"> • Has instructional time been defined and instituted? • Has the plan to extend the school day been developed and implemented by school districts? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • How is adequate time in school per day and per school year determined? What has been the effect of regulations on school time on student achievement? <p><u>District Level</u></p> <ul style="list-style-type: none"> • How is extended time allocated, on which content areas? Is the extended school day uniform for all students? Are teachers trained to use extended school time? What successful models of extended time have schools and districts implemented? • Has the budget to extend the school day/year been formulated and where are the costs accounted for in the foundation budget program? What are the budget tradeoffs between extending the school day or funding other programs? 	<p>Review state and district plans and documents. Recommended for future experimental study.</p> <p>Conduct surveys, interviews and questionnaires at the district level.</p> <p>Review district and school budget documents.</p>
<p>Develop and administer an annual student assessment system. <i>Section 29</i></p>	<p>Establishes a student assessment system to 1) measure outcomes and results regarding student performance and 2) improve the effectiveness of curriculum and instruction. The system shall 1) employ a variety of assessment instruments, 2) be criterion referenced, and 3) include consideration of work samples, projects and portfolios. The system must provide means to compare student performance among school districts on a non-discriminatory basis.</p>	<ul style="list-style-type: none"> • Have student performance standards been established? • Has a student assessment system been established and implemented? • What mechanism for inter-district comparison of student performance are available? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • How accurately does the student assessment system measure individual student academic performance? Does the student assessment system accurately measure the content of the curriculum frameworks? Is the student assessment system an appropriate evaluation tool for all student populations? <p><u>District Level</u></p> <ul style="list-style-type: none"> • How is the student assessment system used as a diagnostic tool to evaluate student and school performance? What diagnostic assessments, in addition to MCAS, are being used to measure student acquisition of skills? What techniques have been implemented to specifically assess the extent to which districts and schools improve or fail to improve student performance? What instruments have been designed to measure quality of instruction, curriculum, technological support, and organizational effectiveness? What distinct factors are considered when assessing a district rather than a school? 	<p>These are psychometric evaluation question requiring longitudinal study and analysis at a later date.</p> <p>Conduct surveys, interviews and questionnaires at the state, district and school level.</p>
<p>Eliminate general track in schools. <i>Section 72</i></p>	<p>Requires school districts to develop a plan to eliminate the general track. Requires BOE to develop alternative to the general track.</p>	<ul style="list-style-type: none"> • Have plans be submitted? • Have plans to eliminate the general track been implemented? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • How are programs developed as an alternative to the general track being evaluated? 	<p>Conduct surveys, interviews and questionnaires at the state, district and school level.</p>

			<p><u>District Level</u></p> <ul style="list-style-type: none"> How have school districts developed alternative programs to the general track? What has been the impact of alternative programs on student performance? 	Conduct surveys, interviews and questionnaires at the state, district and school level. An important question for future longitudinal research.
Implement standards for vocational education. <i>Section 29</i>	Requires BOE to set standards that integrate academic and vocational education.	<ul style="list-style-type: none"> Have standards for vocational education been developed and implemented? How have standards been communicated to teachers, administrators, students and parents? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> What standards are being used to assess vocational education? What is the current status of school-to-work programs? Are they responsive to student and employer needs? <p><u>District Level</u></p> <ul style="list-style-type: none"> How has academic content been integrated into vocational courses? Are school-to-work programs facilitating student achievement and transitions from school to work? 	<p>Conduct surveys, interviews and questionnaires at the state, district and school level.</p> <p>Conduct surveys, interviews, and questionnaires at the state, district and school level. An important question for future longitudinal research.</p>
Develop a comprehensive system for adult basic education. <i>Section 29</i>	Requires BOE to develop a system to serve 1) welfare recipients and other marginally employed adults, 2) immigrants, migrants, and refugees, and 3) school dropouts age 16-24. The system shall lead to 1) universal adult literacy and 2) better employment opportunities.	<ul style="list-style-type: none"> Has the adult basic education system been developed and implemented by DOE? How is universal adult literacy defined and assessed? How is information about ABE communicated to adult learners and high school dropouts? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> What has been the impact of a comprehensive system of ABE on employment in the Commonwealth? Has the ABE system provided participants with sufficient literacy skills to obtain employment and possible career advancement? What populations do ABE programs currently serve? What is the relationship between successful completion of ABE programs and wages? What are the training/certification requirements for ABE educators? What training and professional development programs are available for ABE educators? 	<p>Review state documents. Conduct surveys, interviews and questionnaires at the state level.</p> <p>Review relevant state documents and data. An important question for future longitudinal research. Review state documents.</p>
Ensure safe schools environment. <i>Sections 29, 36, 37, 88, 89, and 95</i>	<p>Establishes violence prevention and conflict resolution grant program.</p> <p>Requires school districts to publish district conduct policies that shall include 1) due process disciplinary proceedings, 2) standards for the suspension and expulsion of students, 3) procedures for disciplining special needs of students, and 4) standards and procedures for school building security, 5) disciplinary measures to be taken in cases involving drugs, weapons, or civil rights violations. High schools must involve principals and school councils collaborating to prepare and distribute student handbooks. Student handbooks shall include a provision</p>	<ul style="list-style-type: none"> Have standards for safe schools been established and communicated to school districts? What plans for safe schools have been developed and implemented? Have school districts published amended student conduct policies? Has a data collection system been developed to record incidents of student violence? Are schools informed of recent IDEA regulations for suspending/expelling students with disabilities? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> To what extent have violence prevention and conflict resolution programs been implemented? What types of programs are being implemented? What is the effect of these programs? <p><u>District Level</u></p> <ul style="list-style-type: none"> What is the level of community participation in these programs? How are discipline policies communicated to students? How do students, faculty, and parents participate in the establishment of disciplinary policies? What is the content of disciplinary policies? What are the perspectives of school personnel, especially school principals, on increased 	<p>Conduct surveys, interviews and questionnaires at the state, district and school level.</p> <p>Conduct surveys, interviews and questionnaires at the state, district and school level. Review documents at the district and school level.</p>

	<p>authorizing the school principal to expel or suspend a student in possession of a weapon or controlled substance, or a student who assaults an education staff member.</p> <p>Requires school personnel to report incidents involving student possession or use of a dangerous weapon on school grounds.</p> <p>Requires the Attorney General to establish a school safety program for school personnel.</p> <p>Establishes a grant program to provide funding for student initiated conflict resolution programs.</p> <p>Authorizes districts to access employee's CORI records.</p>		<p>responsibility for student discipline? Do students, faculty, administrators, parents feel schools are safer? How are disciplinary policies uniformly enforced? How are data about serious disciplinary infractions being maintained and managed? What are the incident rates of school violence (e.g. guns, suspension, and expulsions)? How have they changed over time?</p> <ul style="list-style-type: none"> How do schools of education train school personnel to facilitate school safety? 	<p>Schools/colleges of education surveys and documents.</p>
<p>Promote educational alternatives for chronically disruptive students. <i>Sections 28 and 87</i></p>	<p>Requires Commissioner to assess current programs of alternative education and to develop an action plan for the expansion and improvement of alternative education programs.</p> <p>Establishes a commission to study feasibility of regional boarding schools and other educational alternatives for chronically disruptive students.</p>	<ul style="list-style-type: none"> Has the action plan been developed? Has the Commission been established to study educational alternatives? If so, what were its findings? 	<p><i>State Level</i></p> <ul style="list-style-type: none"> What alternative education programs have been established? What are the goals of alternative education programs? How are they financed? Are there performance standards for alternative education programs? <p><i>District Level</i></p> <ul style="list-style-type: none"> Have alternative education programs been effective in educating students with challenging behaviors? How is the academic, social, and emotional progress of chronically disruptive students determined? What support systems are available in schools to assist teachers with disruptive students? How do schools of education train prospective teachers in effective behavior management strategies? Do state teacher competencies identify specific behavior management skills? 	<p>Conduct surveys, interviews and questionnaires and analyze documents at the state, district and school level.</p> <p>Conduct surveys, interviews and questionnaires and analyze documents at the state, district and school level.</p> <p>Schools and colleges of education surveys and documents.</p> <p>Review state certification guidelines.</p>
<p>Establishes a commission on early childhood education. <i>Section 70</i></p>	<p>Establishes a commission to develop a plan for comprehensive early childhood education. Plan shall include 1) method for financing the program, 2) methods for contracting with private providers, 3) methods for providing statewide outreach to parents for parental education and literacy, 4) studying feasibility of full day kindergarten, and 5) requiring certified teachers.</p>	<ul style="list-style-type: none"> Has the Commission been established? What were its findings? Has a plan been developed for early childhood education? Has the plan been implemented? 	<p><i>State Level</i></p> <ul style="list-style-type: none"> What has been the impact of the Commission's recommendations on early childhood education policy in the Commonwealth? What policies and programs have been developed? How are the programs organized and administered? How are outcomes measured? 	<p>Conduct surveys, interviews and questionnaires and analyze documents at the state level.</p>

<p>Establishes outreach program for parents of young children. <i>Section 84</i></p>	<p>Establishes a demonstration project to assess various models of parent outreach programs for parents of children between the ages of one to three.</p>	<ul style="list-style-type: none"> • Has the demonstration project been established? What were its findings? • Has a model parent outreach program been identified? 	<p><u><i>State Level</i></u></p> <ul style="list-style-type: none"> • What is the feasibility of expanding the demonstration project to serve more children and families? 	<p>Conduct surveys, interviews and questionnaires and analyze documents at the state level.</p>
<p>Study feasibility of funding school-based services. Establishes a comprehensive human service and health education grant program. <i>Sections 29, 94</i></p>	<p>Requires secretary of health and human services to study the funding of school-based social, youth, and mental health and mental retardation services. Establishes a comprehensive interdisciplinary health education and human service grant program funded through the cigarette tax—the Health Protection Fund.</p>	<ul style="list-style-type: none"> • Has the grant program been established and funded? • Has the study been completed? 	<p><u><i>State Level</i></u></p> <ul style="list-style-type: none"> • What types of programs have been established by the grants? Are evaluation provisions built into funding procedures? Are human service and health education programs integrated into schools as support systems for students? What were the findings of the study? To what extent have the findings of the study been implemented? <p><u><i>District Level</i></u></p> <ul style="list-style-type: none"> • Do communities participate in assessing human service and health education needs for local schools? 	<p>Conduct surveys, interviews and questionnaires and analyze documents at the state and community level.</p> <p>Conduct surveys, interviews and questionnaires and analyze documents at the state and community level.</p>
<p>Authorizes a comprehensive study on special education. <i>Section 73</i></p>	<p>Requires BOE to conduct a comprehensive study of special education services provided to students.</p>	<ul style="list-style-type: none"> • Has study been conducted? • What were the findings of the study? • Have the study results been disseminated? 	<p><u><i>State Level</i></u></p> <ul style="list-style-type: none"> • Has the study had an effect on special education policy and programs in the Commonwealth? 	<p>Document and data analysis at the state level.</p>
<p>Establishes a dual enrollment program to allow high school students to enroll in college classes for high school and college credit. <i>Section 23</i></p>	<p>Allows qualified high school students to enroll in college courses for high school and college credit.</p>	<ul style="list-style-type: none"> • Has the program been established? • Has the program been funded? • How is the program advertised to students, teachers, school and college officials, and parents? 	<p><u><i>State Level</i></u></p> <ul style="list-style-type: none"> • How many students are participating in the dual enrollment program? What has been the effect of dual enrollment on student achievement? What has been the effect of dual enrollment on secondary schools? colleges? teachers and college faculty? Do students enrolled in the dual program complete high school and college sooner? <p><u><i>District Level</i></u></p> <ul style="list-style-type: none"> • What types of courses have been taken by dual enrollment students? How many credits have students taken? 	<p>Conduct surveys, interviews and questionnaires at the state and district level. Important questions for future experimental research and longitudinal analysis.</p> <p>Conduct surveys, interviews and questionnaires at the district level. Review documents at the school and college level.</p>

STRATEGIC GOAL #2: Establish a fair and equitable system of school finance.

EDUCATIONAL POLICY	SUMMARY	KEY IMPLEMENTATION QUESTIONS	KEY EVALUATION QUESTIONS	EVALUATION DATA COLLECTION SUGGESTIONS
<p>Provide every school district with a minimum level of spending through the foundation budget program. <i>Sections 32, 68</i></p>	<p>Establishes a formula providing a foundation level of education spending for all students in the Commonwealth. The foundation budget is unique for each school district and varies on a per pupil basis according to three factors: distribution of students by grade or program, number of low income students attending school in the district, and the geographical region in which the district is located. Requires state aid for schools to increase by a specific amount every year between FY94-FY00. Establishes minimum education spending requirements for cities and towns. Requires school districts to report on certain categories of school expenditures. Establishes the Foundation Budget Review Commission to review and recommend changes to the formula. Establishes policy exempting high performing school districts from spending requirements. Exempts school finance law from the local mandate provision of the MGL's.</p>	<ul style="list-style-type: none"> • Have all school districts reached the foundation budget level? Are municipalities meeting local spending requirements? • How does DOE resolve technical issues concerning the foundation budget formula? • What commitment has the legislature and governor made to funding the foundation budget program? What has been the nature of amendments to the formula since the passage of MERA? • Has any school district been exempted from local spending requirements because of outstanding student performance on MCAS? • What is the status of the Foundation Budget Review Commission? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • Is the foundation budget adequate for addressing areas of need and meeting the educational outcomes delineated in MERA? Are the data used for making annual adjustments to the formula to account for fluctuations in per pupil expenditures adequate? What is the impact of the foundation budget program on inter-district equity? What has been the impact of the Foundation Budget Review Commission on the foundation budget program? • Has the foundation budget affected the relationship between school and municipal leaders? What impact has the foundation budget had on municipal spending? <p><u>District Level</u></p> <ul style="list-style-type: none"> • How have school districts spent money in relation to their foundation budget? Have patterns of school spending changed since the adoption of the foundation budget program? How have school districts distributed financial resources to schools? 	<p>Document and data analysis at the state level. Identify and interview relevant DOE and state officials.</p> <p>Survey a sample of municipal officials.</p> <p>Conduct systematic surveys of superintendents. Survey a sample of principals for their perceptions.</p>
<p>Establish policy to ensure districts distribute funds equitably among schools. <i>Section 29</i></p>	<p>Requires the Board to develop a policy ensuring equitable distribution of financial resources among schools in a school district.</p>	<ul style="list-style-type: none"> • What is the policy established by the Board to meet this goal? • How does the Board enforce this policy? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • How does DOE monitor and ensure for equitable distribution of funds? <p><u>District Level</u></p> <ul style="list-style-type: none"> • How are resources distributed across schools and within schools? What role do principals, teachers, and school councils play in developing the school and district budget? Have principals been given authority over school budgets? How does student performance affect local budgeting decisions? 	<p>Document and data analysis at the state level. Identify and interview relevant DOE and state officials.</p> <p>Survey a sample of superintendents, principals, teachers, and counselor members for their perceptions.</p>
<p>Establish an Adult Basic Education working committee. <i>Sections 29, 75</i></p>	<p>Establishes a commission to develop a coordinated ABE service delivery system and funding mechanism.</p>	<ul style="list-style-type: none"> • What is the status of the working committee and what are the results of its work? • To what extent have the recommendations of the committee been implemented? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • Have the recommendations of the committee addressed the adult basic education needs of the Commonwealth? 	<p>Review state documents and interview commissioners and adult basic ed practitioners.</p>

STRATEGIC GOAL #3: Reform school and district governance to improve student learning.

EDUCATIONAL POLICY	SUMMARY	KEY IMPLEMENTATION QUESTIONS	KEY EVALUATION QUESTIONS	EVALUATION DATA COLLECTION SUGGESTIONS
<p>Establish standards for school and district performance and process for declaring schools and school districts “under-performing” <i>Section 29</i></p>	<p>Requires the annual evaluation of public schools and districts by the BOE. Evaluation system must include measures of how schools achieve improvements in student performance. Requires districts to file comprehensive annual reports on student characteristics, performance, curricula design, programs, implementation, and policies.</p> <p>Requires Board to establish regulations to determine when a school is “under-performing.” The process for declaring a school under-performing includes the creation of a fact-finding team and the presentation of an improvement plan to the Board. If two years following the submission of said plan the school is still under-performing, the school’s principal is removed, and a new principal is appointed and given broader powers to dismiss and appoint staff. The state may provide additional funds to increase staff salaries. The district must provide the school with sufficient funds.</p> <p>The Board may declare a district under-performing if, following the review of a fact-finding team, the district has failed to improve student performance. With such declaration, the Board may designate a receiver for the school district. The Board may also determine that the municipality has failed to meet its fiscal obligations under chapter 70 and request that the Commissioner of Revenue not approve the municipality’s tax rate.</p>	<ul style="list-style-type: none"> • Have performance standards been established and what are they? • What process was followed to establish the performance standards? • Has the Board promulgated regulations to determine school or district performance, the creation of a fact-finding team, and the process for declaring schools or districts “under-performing?” 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • What are the performance standards intended to measure? Are student performance measures valid and reliable indicators of school and district performance? • Have there been any under-performing schools or districts? What actions were taken? How effective were these actions? What type of managerial and professional support is available for principals and teachers of under-performing schools? <p><u>District Level</u></p> <ul style="list-style-type: none"> • What effect has the increased authority of school principals in under-performing schools had on school improvement? What additional resources have under-performing schools received and what has been the effect of such resources on school improvement? 	<p>Analyze student performance data to correlate changes in student performance to other measures of student academic achievement. Important questions for future experimental research and longitudinal analysis. Interview appropriate DOE officials.</p> <p>Interview relevant superintendents and principals. Examine outcome measures used to trace performance.</p>
<p>Establish school councils and other forms of school based management. <i>Sections 28, 53</i></p>	<p>Requires Commissioner to assist school districts with the development of school-based management systems and focus on the implementation of participatory management systems.</p> <p>Requires the establishment of school councils in every public school in the Commonwealth. Delegates to the school principal a process for facilitating elections to the school council.</p>	<ul style="list-style-type: none"> • What training do teachers and principals receive in participatory school management? • How is information about effective forms of participatory management systems shared by the Board with school systems? • Have school councils been established in all public schools in the Commonwealth? • How are the data on school council composition collected and maintained? • Are the decision-making procedures used by 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • Is school-based management consistent with improved student performance and increased accountability? What participatory management systems have been developed, how have they been developed, and who was involved in the process? <p><u>District Level</u></p> <ul style="list-style-type: none"> • What have school councils done to improve student achievement or performance? Have 	<p>Survey sample of superintendents, principals, teachers and council members. Interview relevant DOE officials.</p> <p>Survey sample of school administrators, council members, teachers, and students.</p>

	<p>School council must meet regularly with principal to 1) identify student educational needs; 2) to review the annual school budget; and 3) to formulate annual school improvement plan. The school improvement plan shall include 1) impact of class size on student performance; 2) student to teacher ratios; 3) professional development plans and allocation of professional development funds; and 4) strategies for diversity, parental involvement, school safety and discipline, meeting the learning needs of diverse students including plans for inclusion.</p> <p>Allows school committees to grant additional educational policy-making authority to school councils.</p>	<p>each council formalized?</p> <ul style="list-style-type: none"> • What types of training have been offered to school councils? 	<p>school councils effectively made modifications to school budgets? What recommendations have been implemented as a result of school improvement plans? What specifically has changed about the school management process since the introduction of participatory management systems? How are these systems perceived by teachers and local school administrators, parents, students, and school committee members? Has decreasing the power of school committees over school management correlated in an increase of autonomy for local schools?</p>	
<p>Improve the management and efficiency of school districts and encourage the adoption of new regional districts and collaboratives. <i>Section 28</i></p>	<p>Requires Commissioner to facilitate management improvements in local school districts to foster inter-district cost effective purchasing, management collaboration, sharing of resources, and other multi-purpose educational activities.</p>	<ul style="list-style-type: none"> • What specific management improvement strategies have districts undertaken? • What new regional school districts or collaboratives have been created? 	<p><u>District Level</u></p> <ul style="list-style-type: none"> • How has the management of school districts become more efficient? Have school districts established more inter-district management procedures to reduce costs and share resources? How are school districts sharing resources? What are the effects of inter-district resource sharing on school autonomy? 	<p>Survey sample of school administrators.</p>
<p>Establish new roles and responsibilities for school committees. <i>Sections 35, 40</i></p>	<p>Grants authority to the school committee to 1) select and appoint superintendent; 2) review and enact budgets; 3) establish educational goals and policies for the district that are consistent with statewide educational goals; and 4) approve performance standards for teachers and other school district employees.</p>	<ul style="list-style-type: none"> • What training has been provided to school committees about their new roles and responsibilities? • What has been the involvement of school committees in local school finance? • What educational goals and policies have various school committees established? • What performance standards have school committees articulated for school teachers and personnel? 	<p><u>District Level</u></p> <ul style="list-style-type: none"> • What are the effects of decreased school committee powers, particularly in the areas of personnel and school management? Are school committees more effective in setting goals and establishing policies for the district? What impact have school committees had on district budget decisions? How does the authority of the school committee over district budgets affect site based management? To what degree do school committees engage in participatory decision-making? How do school committees work with school councils and other district administrative staff to make decisions about educational policy? How do school committee members perceive their 	<p>Survey sample of school administrators and school committee members.</p>

			governing role? How effective are school committees in using the collective bargaining process to establish educational policies and procedures? What impact does the collective bargaining process have on relationships between school committees and teachers?	
Reorganize advisory councils to the Board. <i>Section 3</i>	Establishes various stakeholder advisory councils to the Board to make programmatic recommendations to meet goals established by the Board.	<ul style="list-style-type: none"> Have all fourteen advisory boards been established? 	<u>State Level</u> <ul style="list-style-type: none"> What effects have advisory boards had on Board decision making? How do the boards complement one another? Where do goals intersect and how do collaborations between boards support state educational goals? 	Interview key BOE and advisory board members.

STRATEGIC GOAL #4: Enhance the quality and accountability of all school personnel.

EDUCATIONAL POLICY	SUMMARY	KEY IMPLEMENTATION QUESTIONS	KEY EVALUATION QUESTIONS	EVALUATION DATA COLLECTION SUGGESTIONS
<p>Establish new process, standards, and regulations to certify and re-certify school personnel. Sections 29, 41, 90</p>	<p>Requires the Board to set standards for certifying all teachers, principals, and administrators.</p> <p>TEACHER CERTIFICATION, AS AMENDED A <u>provisional educator certificate</u> requires the teacher to possess a bachelor’s degree and to pass a written examination. A <u>provisional certificate with advanced standing</u> requires a teacher to meet the requirements of the provisional certificate and to complete an approved teacher education program. A <u>standard certificate</u> requires the candidate to meet requirements set by BOE either through a master’s degree program or an equivalent school district program. All certificates are valid for five years.</p> <p>Teachers possessing a provisional educator certificate have attended a district-based teacher preparation program, and have been observed and evaluated by a professional support team. District teacher preparation programs must be approved by the DOE, must be sponsored by colleges or universities or other school districts or other programs approved by the Commissioner. Requires the DOE to issue standard plans that may be used by school districts to establish alternative certification programs. Requires DOE to conduct orientation programs for professional support team members. Requires Commissioner to set standards for training, support, and supervision of provisional educators. Authorizes Commissioner to approve teacher preparation programs.</p> <p>Requires Commissioner to develop alternative paths for certification of educational school management and educational leadership personnel.</p> <p>TEACHER RE-CERTIFICATION, AS</p>	<ul style="list-style-type: none"> • Have the regulatory revisions for teacher certification taken effect? • Have colleges and universities implemented new certification requirements? • To what extent have alternative teacher certification programs been developed and implemented? • Are alternative certification programs uniform across districts? • What partnerships exist between DOE, school districts, and colleges and universities to develop and improve teacher certification programs? • Have alternative paths for certification of superintendents and principals been implemented? 	<p><i>State Level</i></p> <ul style="list-style-type: none"> • What are the effects of alternative certification programs on teacher supply and quality? What percentage of new teachers has acquired traditional certification versus alternative certification? Is the anticipated supply of new teachers adequate? • In what ways do current certification tests identify quality managers? Is the supply of school management and leadership personnel adequate? • In what ways do current certification tests identify quality teachers? How do tests measure instructional ability and knowledge of classroom management? What does the test measure and is the current test a valid instrument? • What effect has the certification test had on teacher preparation programs? <p><i>District Level</i></p> <ul style="list-style-type: none"> • How do principals and new teachers view new certification requirements? Have the new certification requirements better prepared teachers for the classroom? What impact has the revocation of lifetime certification had on teachers and maintaining experienced teachers in local schools? 	<p>At the state level, conduct a pre-certification/post-certification comparison utilizing state data base. Survey principals and superintendents on hiring practices and qualifications of incoming teachers.</p> <p>Survey superintendents, school committees, teachers and parents. A state-level study of supply/demand of management personnel. A predictive validity study of administrator certification tests. A predictive validity study suggested for the future.</p> <p>Survey teacher education programs in colleges and universities.</p> <p>Survey and interview principals and teachers.</p>

	<p>AMENDED</p> <p>Requires BOE to establish policies and guidelines for Continuing Education Units (AKA PDP's). Certified teachers have five years to complete an individual professional development plan. School district professional development plans must include programs to assist teachers with their re-certification.</p>			
<p>Establish guidelines and a statewide plan for professional development. <i>Sections 41, 72, 78</i></p>	<p>Requires BOE to establish policies and guidelines for Continuing Education Units.</p> <p>Requires all school districts to adopt and implement a professional development plan. Plan shall be updated annually and shall include training in teaching curriculum frameworks, participatory decision-making, parent and community involvement, and training for members of school councils. Plan shall include budget recommendations.</p> <p>Requires the Commissioner to prepare an annual plan for providing statewide assistance in the preparation and implementation of professional development plans.</p>	<ul style="list-style-type: none"> • Have the policies and guidelines guidelines been established? • Has the Commissioner prepared a plan for professional development? What process does the Commissioner use to update this plan? • Have districts adopted and budgeted for professional development plans for all professional staff? • What are the procedures for annually updating plans? • What vendors are providing professional development to teachers? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • How is professional development funded? How much money has been spent on professional development since MERA's passage? • What types of professional development programs have been offered to teachers and how do they relate to state education goals and the implementation of MERA? To what extent does the re-certification process support professional development ? • What role do teachers play in the development and facilitation of professional development programs? How do teachers collaborate with vendors to develop relevant professional programs? How has the Commissioner provided technical assistance to school districts to develop professional development plans? What has been the effect of professional development on improving the effectiveness of teachers? • Has the state developed and implemented a process for evaluating the quality of professional development vendors? <p><u>District Level</u></p> <ul style="list-style-type: none"> • What factors were considered when adopting professional development plans? Who participates in the design of district development plans? How does professional development meet district goals for improvement? How are professional development programs integrated into changes in school and classroom management and pedagogy? How do district professional development plans reflect individual professional development plans and <i>vice versa</i>? How much time during the school year 	<p>Analyze documents and data at the state level.</p> <p>Analyze documents and data at the state level. Survey professional development coordinators at the district level.</p> <p>Conduct interviews and surveys at the district level.</p> <p>Review state documents and data.</p> <p>Conduct interviews and surveys at the district level.</p>

			is set-aside for professional development? What does training for school council members entail? Has the training improved the effectiveness of school councils?	
Establish criteria for performance standards and evaluation of school personnel. <i>Sections 40, 44</i>	<p>Requires BOE to establish teacher performance standards. These standards shall be reviewed biannually by BOE.</p> <p>Encourages school districts to adopt performance standards and evaluation processes more rigorous than standards approved by BOE.</p> <p>Performance standards are approved by the school committee. Procedures for conducting evaluations and establishing performance standards shall be subject to collective bargaining, unless there is no agreement. If no agreement is reached, standards shall be set by an arbitrator. Arbitrator must consider goals of encouraging innovation in teaching and holding teachers accountable for improving student performance and social economic conditions of the student population of the school district.</p>	<ul style="list-style-type: none"> • Has BOE established criteria for performance standards and personnel evaluations? If so, when were the standards last reviewed? • Have school districts adopted teacher performance standards? • How are arbitrators selected and trained to reach decisions about performance standards? • What training have principals and superintendents received on methods to evaluate school district personnel? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • Do performance standards and evaluation systems ensure quality teachers and administrators for the Commonwealth? <p><u>District Level</u></p> <ul style="list-style-type: none"> • Do performance standards in districts differ from those developed by BOE? What influence have school committees had over performance standards? How effective has the collective bargaining process been in reaching agreement over performance standards? What has been the effect of arbitrator's decisions on the adoption of performance standards? Have superintendents conducted timely evaluations of teachers, principals, and administrators? What process do superintendents use to evaluate district personnel? How much time is spent on the evaluation process? Do superintendents feel that they spend an adequate amount of time evaluating personnel? What input do teacher and administrators have in their own evaluation process and that of colleagues? To what extent do teachers participate in the evaluation of administrators? What data are collected in the evaluation of district personnel? How are the data used to document teacher and administrator performance over time? How is the evaluation used as a tool to improve school and classroom management and pedagogy? 	<p>Analyze data at the state level. A longitudinal study of evaluation systems. A predictive validity study.</p> <p>Conduct surveys and interviews at the district level.</p>
Establish a process for dismissing poorly performing personnel. <i>Sections 29, 40</i>	<p>Requires the superintendent to evaluate teachers, principals, and administrators. Teachers and administrators without professional teacher status (PTS) shall be evaluated every year. Teachers and administrators with PTS shall be evaluated every two years. Teachers obtain PTS after three consecutive years of teaching in a school district.</p> <p>Principals provided with authority to dismiss teachers, subject to approval of superintendent. The superintendent may dismiss any employee of</p>	<ul style="list-style-type: none"> • What training have principals and superintendents received on the dismissal law established by MERA? • How are arbitrators selected and trained to reach dismissal decisions? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> • How many teachers and administrators have been dismissed since the passage of MERA? What percentage of the state's teachers has attained Professional Teachers Status (PTS)? How many new teachers are denied PTS? What new case law relative to the dismissal of school personnel has evolved since the passage of MERA? To what degree has MERA made the process of dismissing poorly performing school personnel more efficient? 	<p>Analyze state documents.</p>

	<p>the school district, including the principal. The school committee may only dismiss the superintendent.</p> <p>A teacher without PTS can be dismissed for good cause but must be afforded certain due process rights prior to dismissal.</p> <p>A teacher with PTS may be dismissed for just cause or for failing to meet the performance standards approved by the school committee. A teacher with PTS may seek review of the dismissal decision by petitioning to the Commissioner for arbitration. In reaching a decision about the dismissal the arbitrator shall consider the best interests of the pupils.</p> <p>Principals, assistant principals, and department heads with three years of services shall not be dismissed except for good cause. Principals et. al. may seek review of dismissal through arbitration.</p>		<p><u>District Level</u></p> <ul style="list-style-type: none"> Have principals dismissed poorly performing personnel? How do principals perceive their increased authority to dismiss staff? How do superintendents perceive their role in the dismissal process? How do school committees perceive their role in the dismissal process? To what degree do teachers feel the dismissal process is fair? How effective is the appeals and arbitration process in eliminating poorly performing personnel? 	<p>Conduct surveys and interviews at the district level.</p>
<p>Establish new roles, working conditions, and responsibilities for school principals and superintendents. <i>Sections 36, 37, 40, 41, 43, 44, 47, 51, 53</i></p>	<p>Requires principals to be the educational administrators and managers of schools. Principals are responsible for hiring and firing teachers and other school-based personnel subject to district policy and the approval of the superintendent. Principals must promote participatory decision-making. They may recommend awarding PTS, may purchase textbooks and other supplies, co-chair school councils and prepare a school improvement plan. Principals may expel or suspend a student in possession of a weapon or controlled substance, or a student who assaults a school staff member.</p> <p>Principals shall not be represented in collective bargaining, but shall receive employment contracts negotiated with the superintendent and approved by the school committee.</p> <p>Provides school superintendents with broader authority over school personnel. Superintendents are responsible for evaluating all personnel and for hiring and suspending, and dismissing teachers, principals, and other senior level staff.</p>	<ul style="list-style-type: none"> How have certification requirements been amended to reflect the new responsibilities for school administrators? 	<p><u>State Level</u></p> <ul style="list-style-type: none"> What professional development and state-level technical assistance is provided to principals and superintendents as managerial responsibilities evolve? How do schools/colleges of education prepare principals and superintendents for their new management and leadership roles? <p><u>District Level</u></p> <ul style="list-style-type: none"> To what extent has the sharing of hiring and firing authority between principals and superintendents affected school management? To what extent have broader responsibilities for principals created opportunities for more effective school leadership? What effect have these broader responsibilities had on the working conditions of school principals? What effect has employment contracts had on principal morale and performance? How have principals provided the leadership for the implementation of school improvement plans? Have principals provided participatory decision-making? What role do principals play on school councils? How do principals 	<p>Conduct surveys and interviews at the state level.</p> <p>Conduct surveys and interviews at the local level.</p>

	Superintendent has authority to layoff school personnel. Responsible for publishing district's educational policies and reviewing suspension and expulsion of students		make decisions about awarding Professional Teacher Status (PTS) to teachers? How does the enhanced authority of superintendents complement or undermine site-based management and their work with school committees?	
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STRATEGIC GOAL #5: Introduce new models of school organization, finance, and parental participation.

EDUCATIONAL POLICY	SUMMARY	KEY IMPLEMENTATION QUESTIONS	KEY EVALUATION QUESTIONS	EVALUATION DATA COLLECTION SUGGESTIONS
<p>Establish a statewide system of independent public charter schools <i>Section 55</i></p>	<p>CHARTER SCHOOLS, AS AMENDED Establishes two types of charter schools: Commonwealth and Horace Mann Charter schools.</p> <p>Commonwealth Charter schools are public schools managed by a board of trustees and operate independently of local school committees. Horace Mann Charter schools are public schools operating under a charter approved by a local school committee.</p> <p>The purposes for establishing charter schools are 1) to stimulate the development of innovative programs within public education; 2) to provide opportunities for innovative learning and assessments; 3) to provide parents and students with greater options in choosing schools; 4) to provide teachers with a vehicle for establishing schools with alternative and innovative methods of instructions; 5) to encourage performance-based educational systems; 6) to hold teachers and administrators accountable for student performance; and 7) provide models for replication in other public schools.</p> <p>BOE may award 50 charters. Thirteen charters are reserved for Horace Mann Charter schools and 37 for Commonwealth Charter schools. In approving new charters, BOE may give priority to schools located in low performing districts.</p> <p>Charter schools must be open to all students and must not discriminate in admitting students. Students living in a town where the charter school is located have admission preference. Students in charter schools must meet the same performance requirements set by BOE for all public school students.</p> <p>The school committee in each district where a Horace Mann Charter school is located must develop a plan for disseminating innovative</p>	<ul style="list-style-type: none"> • Have Commonwealth charter schools been established? Have Horace Mann charter schools been established? • What procedures have been established for the evaluation of charter schools and the revocation or renewal of charters? • Has BOE identified performance standards for charter schools? 	<p><i>State Level</i></p> <ul style="list-style-type: none"> • What indicators do charter schools use to evaluate student performance? What programs have charter schools implemented to improve student performance? What effects have charter schools had on student performance? What alternative assessments do charter schools employ to measure student learning? How do parents of charter school students perceive the effectiveness of charter schools? What has been the involvement of teachers in the design and development of charter schools? • To what standards are teachers and administrators held accountable and how do they differ from traditional public school standards? How does BOE determine if a charter school has developed an innovative educational practice and how are such practices shared with other public schools? • What aspects of charter schools have served as program models for public education? • What is the correlation between low performing school districts and the establishment of charter schools? Have charter schools provided equal access to all students with disabilities and Transitional Bilingual Education students? • How have charter schools expanded parental choice? • What has been the impact of charter schools on public education in the Commonwealth? 	<p>Survey principals of charter schools.</p> <p>Interview relevant DOE officials.</p> <p>Survey sample of school administrators.</p> <p>Examine relevant evaluative documents and data.</p> <p>Survey sample of parents and charter school principals. Survey DOE, public school administrators, and charter school principals.</p>

	<p>practices. The Commissioner shall disseminate successful models of innovation in Commonwealth Charter schools.</p> <p>BOE shall develop procedures and guidelines for the revocation and renewal of a school's charter.</p>			
<p>Establish a mandatory statewide school choice program. <i>Section 61</i></p>	<p>Establishes a school choice program. The program requires every school district participating in the program to enroll non-resident students in their public schools. School committees are required to conduct an annual vote to opt out of the school choice program.</p>	<ul style="list-style-type: none"> • How many school districts are accepting school choice students? • How many students are participating in the school choice program? 	<p><u><i>District Level</i></u></p> <ul style="list-style-type: none"> • What is the impact of school choice on the sending and the receiving school district? Why do school districts choose not to participate in the school choice program? What are the characteristics of the school districts that "opt out" of school choice? How does school choice correlate to increased parental involvement in schools? Is there a relationship between school choice and foundation budget? 	<p>Survey school administrators and parents.</p>
<p>Develop and publish school district profiles and implement a parent information system for school choice. <i>Sections 29, 61</i></p>	<p>Requires BOE to publish school district profiles that shall include 1) information on student achievement; 2) qualifications of teaching staff; 3) and other relative school performance information. BOE is required to identify schools and school districts that are successful in improving student performance and shall analyze the strategies employed by such schools. BOE shall report its findings annually.</p>	<ul style="list-style-type: none"> • Have the school district profiles been published? • Is the parent information center operational? • How does BOE define and identify successful school improvement strategies? 	<p><u><i>State Level</i></u></p> <ul style="list-style-type: none"> • What kinds of educational data are used for school district profiles? How comprehensive are the data? How relevant are the data? Have profiles influenced state and local educational planning? Are profiles effective in communicating school performance? Are profiles used to make decisions about choosing a school? How frequently are profiles used to make such decisions? Are school district profiles shared among faculty and staff? 	<p>Survey sample of DOE officials, superintendents, and parents.</p>

STRATEGIC GOAL #6: Ensure that MERA policy initiatives work together to promote education reform and school improvement.

EDUCATIONAL POLICY	KEY IMPLEMENTATION QUESTIONS	KEY EVALUATION QUESTIONS	KEY EVALUATION DATA COLLECTION SUGGESTIONS
<ul style="list-style-type: none"> • Establish a Common Core of Learning. • Establish curriculum frameworks and student academic standards. • Evaluate and define instructional time and develop a plan to extend the school day. • Develop and administer an annual student assessment system. • Eliminate general track in all schools. • Implement standards for vocational education. • Develop a comprehensive system for adult basic education and literacy. • Ensure safe schools environment. • Promote educational alternatives for chronically disruptive students. • Establish a commission on early childhood education. • Establish outreach program for parents of young children. • Establish a comprehensive human service and health education grant program. • Establish a Commission on Bilingual education. • Conduct a comprehensive study of special education. • Establish a dual enrollment program to allow high school students to enroll in high school and college classes for dual credit. • Provide every school district with a minimum level of spending through the foundation budget program. • Establish a working committee to review funding for Adult Basic Education. • Establish policy to endure districts distribute funds equitably among schools. • Establish standards for school and district performance and process for declaring schools “under-performing.” • Establish school councils and other forms of school based management. • Improve the management and efficiency of school districts and encourage the adoption of new regional districts and collaboratives. • Establish new roles and responsibilities for school committees. • Reorganize advisory councils to the Board. • Establish new process, standards, and regulations to certify and re-certify school personnel. • Establish guidelines and a statewide plan for professional development. • Establish criteria for performance standards for school personnel. • Establish principles and guidelines for evaluation of school personnel. • Establish a process for dismissing poorly performing personnel. • Establish new roles, working conditions \, and responsibilities for school principals. • Establish new roles and responsibilities for school superintendents. • Establish a statewide system of independent public charter schools. • Establish a mandatory statewide school choice program. • Establish parent information system for school choice. 	<ul style="list-style-type: none"> • Have status reports on implementation of MERA been developed and reviewed by BOE? Have status reports on implementation of MERA been disseminated to the educational community? • Have special plans and studies required by MERA been developed and forwarded to BOE? Have such plans and studies been disseminated to the educational community? • What is the timetable for the completion of any “unfinished” studies? • What significant changes/modifications to MERA have been made through legislation and/or regulation? • Has information about modifications/amendments been disseminated to the educational community? • Have the financial and technical support resources for implementing MERA been provided by DOE as specified in MERA? 	<ul style="list-style-type: none"> • Do education reform initiatives—funding, governance, and accountability—work together in support of student learning? • Do state-level policies facilitate school and district capacity to implement standards-based reform? • Do site-based management and school accountability work together to promote educational reform? • What is the relationship between MCAS test results, student performance, and teacher, school, and district effectiveness? • Are the common core and curricular frameworks addressed in teacher preparation programs, teacher tests and certification requirements, professional development, and teacher evaluation policies? • What effect has state-level leadership had on the implementation of MERA? • Do governance changes promote accountability and school improvement? • How important are the finance provisions to the success of other aspects of MERA such as student performance and improvement? 	<ul style="list-style-type: none"> • Develop a set of indicators of progress toward educational reform that can be monitored through continuous data collection and analytic procedures. • Develop plans for in-depth analysis of one key policy area (e.g.: school finance; teacher development, school leadership, and school governance; curriculum, standards, and assessment of learning; etc.) each year so that all major policies can be reviewed over a five-year period. Such in-depth analysis would include questionnaire and interview studies to collect information specific to Massachusetts, studies of similar policy development in other states, and the development of new legislation as needed. • Develop a Web-based forum for broad dissemination of information about MERA and to share the results of evaluative studies with researchers and policymakers. • Develop a five-year plan for MERA evaluation for use by the Education Reform Review Commission.

PROPOSED FIVE YEAR RESEARCH AND EVALUATION PLAN

PROJECT	1999/2000 FY00	2000/2001 FY01	2001/2002 FY02	2002/2003 FY03	2003/2004 FY04
Education Reform Events and Implementation	Final year of 7 year funding schedule appropriated. All districts at or above foundation budget. Development of school accountability system.	Current 10 th graders must pass MCAS to graduate from high school in 2003. Implementation of school accountability system.		Class of 2003 required to pass 10 th grade MCAS to graduate from high school.	
Education Reform Indicators	Establish working group to develop ed reform indicators. Begin data collection process.	Publish first annual education reform indicator report.	Publish second annual education reform indicator report.	Publish third annual education reform indicator report.	Publish fourth annual education reform indicator report.
Education Reform Research	Organize state conference on education reform research and evaluation. Develop strategy for dissemination of research results.	Sponsor annual research conference.	Sponsor annual research conference	Sponsor annual research conference	Sponsor annual research conference
School finance <ul style="list-style-type: none"> • Provide every school district with a minimum level of spending through the foundation budget program. • Establish a working committee to review funding for Adult Basic Education. • Establish policy to endure districts distribute funds equitably among schools. 	Sponsor research focusing on school finance issues. Assess adequacy and equity of finance provisions.				
Teacher development, school leadership, and school governance <ul style="list-style-type: none"> • Establish new process, standards, and regulations to certify and re-certify school personnel. • Establish guidelines and a statewide plan for professional development. • Establish criteria for performance standards for school personnel. • Establish principles and guidelines for evaluation of school personnel. • Establish a process for dismissing poorly performing personnel. • Establish new roles, working conditions \, and responsibilities for school principals. • Establish new roles and responsibilities for school superintendents. • Establish new roles and responsibilities for school committees. • Establish school councils and other forms of school based management. • Improve the management and efficiency of school districts and encourage the adoption of new regional districts and collaboratives. • Reorganize advisory councils to the Board. 		Sponsor research focusing on teacher development, school leadership, and school governance. Assess adequacy of certification standards and processes and professional development to produce high quality teachers and administrators. Evaluate overall effectiveness of governance provisions.			

<p>Curriculum, standards, and assessment of learning</p> <ul style="list-style-type: none"> • Establish a Common Core of Learning. • Establish curriculum frameworks and student academic standards. • Develop and administer an annual student assessment system. • Eliminate general track in all schools. • Implement standards for vocational education. • Evaluate and define instructional time and develop a plan to extend the school day. • Ensure safe schools environment. 			<p>Sponsor research focusing on curriculum, standards, and assessment of learning. Assess extent to which curriculum and assessment aspects of MERA affect student learning and performance.</p>		
<p>School accountability</p> <ul style="list-style-type: none"> • Establish standards for school and district performance and process for declaring schools “under-performing.” • Establish a statewide system of independent public charter schools. • Establish a mandatory statewide school choice program. • Develop and publish school district profiles and establish a parent information system for school choice. 				<p>Sponsor research focusing on school accountability. Determine extent to which combination of accountable public schools, school choice, and charter schools serve the Commonwealth.</p>	
<p>School governance and state-level education reform initiatives</p> <ul style="list-style-type: none"> • Establish a commission on early childhood education. • Establish outreach program for parents of young children. • Establish a comprehensive human service and health education grant program and study the feasibility of funding school-based services. • Establish a Commission on Bilingual education. • Conduct a comprehensive study of special education. • Develop a comprehensive system for adult basic education and literacy. • Establish a dual enrollment program to allow high school students to enroll in high school and college classes for dual credit. • Promote educational alternatives for chronically disruptive students. 					<p>Sponsor research focusing on additional state-level education reform initiatives. Review all major findings from research in last four years and develop modifications to MERA legislation or new comprehensive reform package.</p>