



**Evaluation of Massachusetts Reading First
Year 1 Evaluator's Report
A Review of Program Activity through June 30, 2003**

Presented to the Massachusetts Department of Education

November 2003



Contents

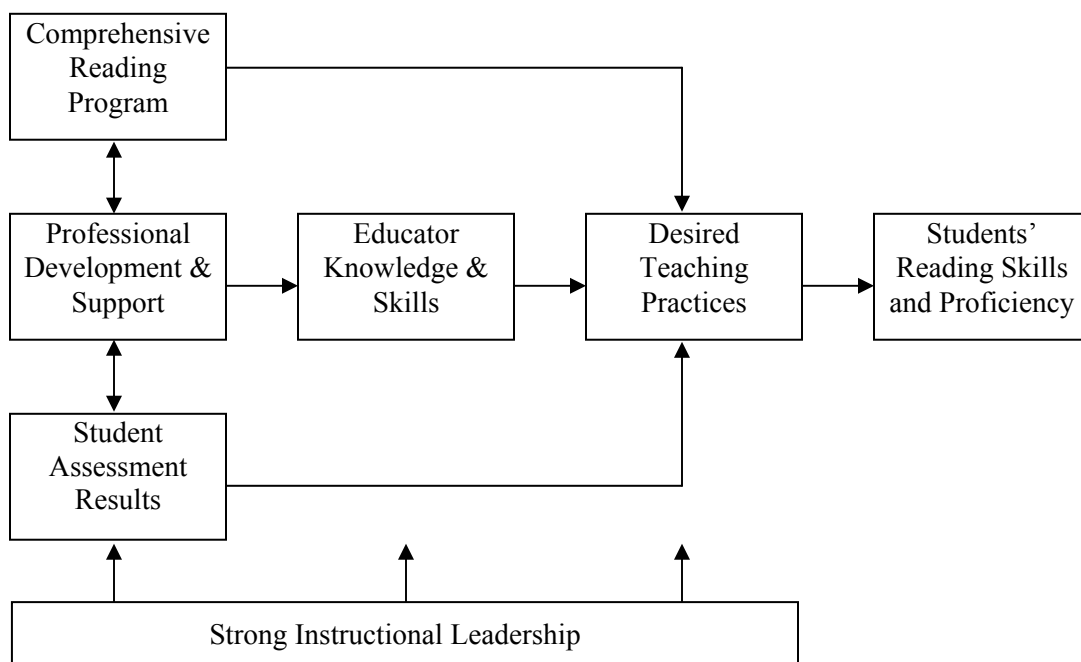
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Introduction

Evaluation Design Overview

The evaluation plan for the Massachusetts Reading First Program (MRFP) is organized according to a basic logic model, which describes the program and its anticipated outcomes. Presented in simplistic terms, the model associates several key inputs (implementation of comprehensive reading programs, participation in professional development and support activities, and utilization of student assessment data) with intermediate outcomes (changes in teachers' knowledge and skills and changes in teaching practice). The model also relates those intermediate outcomes to changes in students' acquisition of reading skills and overall reading proficiency.

The Massachusetts Reading First logic model can be represented as follows:



The evaluation is designed to serve both formative and summative functions. As a formative activity, the evaluation provides timely, ongoing feedback to support the Massachusetts Department of Education's (MADOE) management of the initiative. This includes documenting the nature, extent, and effectiveness of district and state-level program activities. In its summative role, the evaluation is designed to measure progress toward, and overall attainment of, the programs' fundamental objectives with regard to teacher knowledge, skill levels and teaching practices (intermediate outcomes) as well as changes in students' reading skills and proficiency. Major data sources include: event-specific participant feedback instruments, district subgrant proposals, school literacy profiles, participant surveys, a teacher knowledge assessment, classroom observations, and student assessments.

Consistent with federal expectations for the first Annual Performance Review. This Year 1 Evaluator's Report documents program activity from October 2002, when the grant was first awarded, through June 2003. Thus, it is primarily limited to a review of program start-up activities. Documentation of program implementation and teacher and student outcome measures will be provided in the future reports.

Timeline of Year 1 Accomplishments

The following is a brief summary of MRFP accomplishments through June 30, 2003. Each activity will be addressed in more detail later in this report.

October 2002	Massachusetts receives \$100 million grant over 6 years making it the 12 th state to receive its Reading First award. Eligible school districts are notified of local subgrant competition.
November 2002	Introductory meeting for superintendents from eligible school districts. First meeting of the State Reading Leadership Team.
December 2002	Two-day proposal development workshop provided for eligible districts. MADOE posts RFR for Partnership for Achievement in Reading (PAR) and Lead Trainers.
February 2003	District subgrant proposals are due.
March 2003	District subgrants are awarded. Second meeting of the State Reading Leadership Team.
April 2003	Contracts for PAR and Lead Trainers are awarded.
May 2003	Orientation held for key personnel from subgrant districts.
June 2003	Assessment Teams from Reading First Schools receive two-day assessment training. PAR hires 10 Regional Providers (RPs).

Reading Leadership Team Activity

Massachusetts appointed a State Reading Leadership Team to set policy with regard to promoting a unified approach to reading instruction across the state. The Massachusetts Reading Leadership Team is charged with broadly reviewing policy to be sure that it is aligned with Reading First, while providing oversight of the implementation and evaluation of MRFP. Members of the Reading Leadership Team represent a diverse constituency, but share a common interest in improving reading instruction and the reading skills in K-3 classrooms. A list of members (current through June 2003) is provided in Appendix A.

The first Reading Leadership Team meeting was held on November 19, 2002 at the Beebe School in Malden. The purpose of the meeting was for members to get to know one another, to develop a better understanding of the plan for MRFP, and to begin discussing roles and responsibilities. The next Reading Leadership Team was held on March 26, 2003 at the State House in Boston. Members were provided with an update on MRFP start-up activities such as the subgrant award process. They were also introduced to the Partnership for Achievement in Reading, which was contracted to manage and deliver the professional development component of Reading First.

District Subgrants

District Eligibility

In October 2002, soon after Massachusetts received word that its Reading First proposal had been approved, MADOE notified eligible districts of the upcoming subgrant competition. In its federally-approved proposal Massachusetts identified eighty-seven¹ eligible districts representing about 23% of the state's operating school districts. The list consisted of districts that met certain criteria for either low levels of reading proficiency OR high levels of poverty.

The superintendents from each of these districts were invited to attend an introductory meeting on November 21, 2002. The meeting was jointly sponsored by MADOE and the Massachusetts Association of School Superintendents. The meeting featured several key presentations. Chris Doherty, Director of Reading first for the U.S. Department of Education provided insights on the federal perspective on the program. Ed Moscovitch, an educational consultant, presented his ideas on the essential elements of good reading programs, and finally Barbara Gardner and Dot Earle from MADOE offered an overview of the Massachusetts plan for Reading First.

In early June 2003, after grants had been awarded, MADOE became aware that it had incorrectly interpreted the federal funding guidelines, which required that eligible districts meet criteria for BOTH low levels of reading proficiency AND high levels of poverty (as opposed to one criterion or the other). As a result, fifty-one districts were incorrectly identified as eligible to receive Reading First funding. Through this process of reevaluating the eligibility list it became clear that simply applying the "AND" with the existing eligibility criteria would lead to an imbalance in district characteristics that would, "violate the spirit and intent of *Reading First*, which aims at reaching a number of diverse communities with significant pockets of disadvantaged students who are experiencing reading failure."² Thus, MADOE made some slight modifications to the criteria defining low reading proficiency in order to slightly expand the pool of eligible districts. These changes were approved by the U.S. Department of Education on June 13, 2003. As a result of this remedy, fifty-three of the originally identified districts remained eligible and one additional district (Easthampton) was added to the list. Thirteen of the thirty-four districts now deemed ineligible had been mistakenly awarded Reading First funding. These districts received state funding equal to their first year Reading First allocations through BayState Readers Development grants

See Appendix B for a more complete explanations of both the original and revised eligibility criteria as well as the impact on individual district eligibility status.

Technical Assistance

Districts wishing to submit proposals for Reading First funding were provided with technical assistance through a MADOE contract with RMC Research. MADOE allocated \$46,200 for this contract.

The first technical assistance activity was a two-day proposal development workshop held in mid-December. Interested districts could choose to attend the workshop in Boxborough (December 16-17) or Sturbridge (December 18-19). Although these sessions were held as the holidays approached – a particularly difficult time of year for school personnel – participation levels were quite strong. The agenda for these sessions was developed jointly by MADOE and RMC Research and provided district staff with an overview of MRFP and its

¹ Massachusetts' Reading First proposal gives the number of eligible districts as 88, however one of the eligible charter schools (Community Day) is counted twice – once for K-1 and again for 2-3. The reason for treating these grades as distinct LEAs is not clear.

² MADOE Memo from Mark McQuillan to *Reading First* Applicants and Eligible Districts. June 25, 2003.

various components, a presentation on scientifically-based reading research, guidance on how to evaluate school readiness to implement reading first, an introduction to additional technical assistance available for proposal preparation, and finally an exhibit session where publishers shared their available programs.

In addition to the two-day workshops described above, RMC Research was available to provide proposal development assistance to individual school districts. Under this arrangement six individual experts provided technical assistance up to a maximum of 40 days of assistance for all districts. Support included phone calls and email communication to answer questions, reading and responding to draft proposals, conducting a conference call with each district to review drafts with respect to the review criteria. Written comments were provided when requested by the district.

In all RMC had contact with fifty-three districts. Of them, thirty-seven submitted draft proposals for review. Of the fifty-three districts contacted, twenty-eight were funded in Phase 1 (see below), eleven received state funding through BayState Readers Development grants. Only four districts that did not request technical assistance received funding.

Subgrant Selection

The subgrant Request for Response (RFR) differs only slightly from the draft included in Massachusetts' proposal for federal funding. Perhaps the most substantive change is the addition of competitive priority points for districts where "the principal and 85% of the K-3 faculty from the schools submitted for consideration will attend the one-week summer 2003 reading academy." The RFR was available on the MADOE website and also distributed at the December proposal development workshops.

District responses to the RFR were due on February 28, 2003. In total sixty-four of the eighty-seven identified school districts (74%) submitted proposals for Reading First funding. Proposals were reviewed by expert teams using a common scoring rubric. Each of the ten rubric sections were required to attain ratings in the "Meets Standard" or "Exemplary Plan" range for the application to be funded – failure to meet that criteria in even one of the rubric sections automatically disqualified the proposal. Proposal elements evaluated using the rubric were:

- Schools to be Served (5 points maximum)
- Instructional Leadership (15 points maximum)
- Instructional Programs and Strategies (15 points maximum)
- Supplemental and Intervention Instructional Materials (5 points maximum)
- Availability of Print Materials (5 points maximum)
- Instructional Assessments (15 points maximum)
- District and School-Based Professional Development (15 points maximum)
- District Based Technical Assistance (10 points maximum)
- Evaluation Strategies (10 points maximum)
- Competitive Criteria (5 points maximum)

The first group of district subgrants were approved by the Massachusetts Board of Education on March 25, 2003. At that time, grants were awarded to thirty-eight districts representing sixty-one schools, all of which scored at least 70 of a total 100 points on the rubric. As noted earlier in this report, thirteen of those awards were made to districts that were later found to be ineligible to receive Reading First funding (now referred to as BayState Readers Development Grant schools). Among those grants awarded in March 2003, twenty-five were made to eligible districts representing forty-six schools. These grants are generally referenced as Phase 1/Round 1 grants.

In order to facilitate distribution of the Reading First funds initially allocated to the BayState Readers Development grant schools, MADOE lowered to original cut score for successful proposals to 65 of 100 possible points. Under this remedy, seven additional districts were notified that they would be receiving Reading First

grant awards. These grants, generally referenced as Phase 1/Round 2 awards were announced in late June 2003, however funds would not be made available until October 1, 2003.

The following is a brief summary profile of the characteristics of Phase 1 Reading First districts:

- The median percentage of students scoring below the proficient level in reading is 53%, with individual district figures ranging from 29% in Plymouth to 77% at the Lowell Community Charter School.
- The median percentage of students scoring at the warning level in reading is 9%, with individual district figures ranging from 2% in Pittsfield to 30% at the Boston Renaissance Charter School.
- The median percentage of students in poverty is 25%, with individual district figures ranging from 13% in Quincy to 62% at the Lawrence Family Development Charter School.

Massachusetts Reading First districts are required to select and implement a core reading program as well as appropriate supplemental and intervention materials. As of the date of this report, all districts had begun to implement core programs. However, many were continuing to explore various supplemental and intervention options to address specific learning needs of their students. The most prevalent core program is Harcourt Trophies, used by twelve districts.

Reading First Core Reading Program Selections	
Program	# of districts
Harcourt Trophies	12
Houghton Mifflin Nation's Choice	4
Scott Foresman	4
Open Court	3
Success for All	3
Other	5
To be determined	2

According to the subgrant RFP and consistent with federal Reading First guidelines, the percentage of Reading First funds awarded to a district cannot be less than the percentage that the district received of the state's Title I Part A funds during the previous fiscal year. In addition, the maximum amount awarded for each school relates to the number of students enrolled as follows:

Reading First Maximum Allocations by School Enrollment	
Enrollment	Maximum allocation per school
Up to 150	\$190,000
151-300	\$200,000
301-450	\$210,000
Over 450	\$220,000

Initial subgrant awards to Phase 1 and schools totaled \$10,835,477. Of that amount \$8,736,213 was distributed to Round 1 schools for use between March and August 2003. The remaining \$2,099,264 would become available to Round 2 schools on October 1, 2003. The following is a brief summary profile of the awards to Phase 1 Reading First districts:

- The average award was approximately \$338,600 per district, with individual district awards ranging from approximately \$115,000 for the Neighborhood House Charter School to \$840,000 for the Springfield Public Schools.
- In total these awards provide support to fifty-nine participating schools. The number of participating schools per district ranges from one to four.
- Based on 2002-2003 enrollment figures, this funding will support about 17,000 students in kindergarten through third grade. On average each district will serve 535 students, with K-3 enrollments ranging from about eighty students at the Neighborhood House Charter School to nearly 1,500 in the Springfield Public Schools.
- The average award per pupil is about \$800, ranging from approximately \$300 per pupil at the Boston Renaissance Charter School to more than \$2,000 per pupil at the Robert M. Hughes Academy Charter School.

See Appendix C for information on each of the funded districts.

Developing Program Infrastructure

Partnership for Achievement In Reading and Lead Trainers

The Massachusetts Reading First proposal called for MADOE to contract with an outside partner to manage all Reading First professional development activities. Responsibilities of this entity (called the Partnership for Achievement of Reading or PAR) include:

- Planning and coordinating all aspects of the Teacher Reading Academies (TRAs) – including preparing the curriculum as well as hiring and training the trainers.
- Hiring, training and overseeing Regional Professional Development Providers (RPs)
- Overseeing operations of two Reading Resource Centers

Consistent with state procurement policies, a Request for Response for PAR was issued and posted on the Operational Services Division website (www.compass.com). Proposals were received from two organizations. In March 2003 and an initial contract for services worth \$5.3 million was awarded to Lexia Learning Systems for services to be provided through June 2005. Under this bid, MADOE has the option to award up to three annual renewals with the potential to carry to contract through June 2008.

Although the contract was awarded to Lexia, PAR is actually a partnership that also includes the Grimes Reading Institute and the Hanson Initiative for Language and Literacy (HILL) at Massachusetts General Hospital's Institute for Health Professions. Under this arrangement Lexia essentially serves as a fiscal agent providing management and administrative support for the partnership. The Grimes Reading Institute oversees activities associated with the Teacher Reading Academies and, in the future, the Reading Resource Centers. The HILL is responsible for activities related to the Regional Professional Development Providers.

Under a separate bidding process, MADOE contracted for three Lead Trainers to assist PAR in its preparation delivering the Teacher Reading Academies. The Lead Trainers primary responsibilities were to adapt the Texas academy curriculum for use in Massachusetts, to participate in the selection of Master and Regular trainers, and to prepare those trainers to deliver the content at the Teacher Reading Academies. Again, a Request for Response was issued and posted on the Operational Services Division website. Proposals were received from five individuals with contracts awarded to three – Sally Grimes (of the Grimes Reading Institute), Sarah Hewitt, and Joan Sedita.

Establishing the Curriculum

As outlined the Massachusetts Reading First proposal, curriculum for the Teacher Reading Academies is based on the modules developed for use in Texas. These materials were made available to Massachusetts and other states through a contract between the U.S. Department of Education and the developers in Texas. The Lead Trainers' first responsibility was to adapt the Texas materials for use in Massachusetts. In interviews with the evaluator, the each of the Lead Trainers stressed the importance of having the Texas modules as a starting point, especially given the short amount of time available to prepare for the summer academies. (The Lead Trainer contracts were awarded in March with trainer preparation scheduled for May and June followed by summer academies scheduled for July and August.)

Yet they also acknowledged some difficulties with the material they received. First, they had expected the modules to be completely “de-Texafied.” However, upon receipt the Lead Trainers found that modules needed significantly more adaptation than expected thus increasing the effort and related costs of establishing the Massachusetts curriculum. Second, receipt of the third-grade modules was delayed due to litigation in Texas. When they were received, the Massachusetts Lead Trainers found them to be of lesser quality than the K-2 modules, which were developed by another organization. Although the Lead Trainers made efforts to improve the third grade material, there simply was not enough time to bring them up to the quality level of the other grade-levels for the summer academies. In particular, the Lead Trainers expressed the need for the third grade curriculum to include stronger content on struggling learners, phonemic awareness, phonic and word study, vocabulary and structural awareness. In addition, whereas the other curricula tended to spiral back to reinforce material from earlier grade-levels, the third grade curriculum essentially picked up where the second grade curriculum left off. Thus leaving third grade teachers somewhat ill-equipped to deal with significantly below grade-level readers.

Other challenges stemmed from MADOE uncertainties about how to deal with the assessment and English Language Learners content. These topics were generally integrated into the Texas modules, but MADOE had some interest in dealing with them separately during the fifth day of the academy. As a result, the Lead Trainers removed most of this material from the modules, but without a good understanding of how and to what extent MADOE would address them.

Hiring and Preparing Summer Trainers

With support from the Lead Trainers, PAR hired and trained a cadre of trainers to lead the Teacher Reading Academies. More than 130 applicants were recruited through the MADOE website and word of mouth. Initially, applicants were rated against an evaluation rubric, which judged them on the following criteria:

Trainer Evaluation Rubric	
Category	Criteria
Education (maximum 10 points)	<ul style="list-style-type: none"> • Masters degree or above (5 points) • Relevance of degree (5 points)
Professional Development/ Training Attended (maximum 30 points)	<ul style="list-style-type: none"> • Attended significant, relevant training in the past 10 years (10 points) • Focus was related to 3 or more of the 5 components (15 points) • Trained in at least one explicit, systematic program (5 points)
Presentation Experience (maximum 30 points)	<ul style="list-style-type: none"> • Presented significant, relevant training in the past 10 years (15 years) • Focus was related to 3 or more of the 5 components (15 points)
Current Position (maximum 20 points)	<ul style="list-style-type: none"> • Direct involvement with K-3 children (10 points) • Direct involvement with educators/school leaders (10 points)
Assessment (maximum 10 points)	<ul style="list-style-type: none"> • Familiarity with required assessments – DIBELS, CTOPP, PPVT-III, GRADE, and DRP (2 points each)

According to PAR, the vast majority of applicants had strong professional credentials. Furthermore, simply ranking applicants against the rubric proved insufficient to identify a group of trainers with diverse experience and perspectives. Therefore, PAR took the following additional steps in its review:³

- Grouped applicants by current position -- classroom teachers, higher education faculty, specialists such as speech language pathologists or special education teachers, and independent consultants – and select a percentage of applicants from each of the categories with preference for experienced classroom teachers.
- Gave consideration to experienced trainers who may not have had specific experience in presenting in the five components of reading.
- Worked to represent urban, rural and suburban regions of Massachusetts as well as select trainers from the maximum number of school districts to provide diversity of experience.
- For logistical reasons, preference was granted to trainers with more scheduling and travel flexibility as well as willingness to train at multiple grade-levels.
- If an applicant was unknown by the review team, references were checked and other potential informants contacted.

The following is a summary of the selected trainers' qualifications:

Trainer Qualifications	
Criteria	Meet Qualification
Masters Degree	94%
Degree relevant to reading	98%
Attended relevant PD/training (more than 20 points)	80%
Delivered relevant PD/training (more than 15 points)	67%
Experience working in K-3 education	86%
Current classroom teacher or school specialist	69%
Experience working with K-3 educators	96%
Familiar with MRFP assessments (1 or more)	82%
Inner city or rural teaching experience	59%

In interviews, the Lead Trainers expressed some concerns about the trainer application and evaluation rubric. They felt these tools could have been structured to provide more insight into applicants' backgrounds and philosophies regarding reading instruction. However, the Lead Trainers also felt that despite the weaknesses in these tools the selected trainers were an experienced, well-qualified and talented group. This was largely attributable to the additional screening work they undertook by checking references and contacting other potential informants who may have worked with the applicant.

The successful applicants were trained in grade-level specific sessions during May and June of 2003. The general approach to these four-day sessions was that the Lead Trainers presented the academy material as the trainers looked on in the presenters' manuals. Strategically placed "meta-training breaks" allowed some limited time for questions, reflection and discussion.

³ PAE Memo from Jon Bower to Cheryl Liebling. June 26, 2003.

As part of the evaluation, the Donahue Institute conducted a written survey of training participants. In general respondents rated the training very favorably with more than 90% rating it as either good or excellent. Other aspects of the training were rated as follows:

Trainers Feedback – The Training as a Whole	
For me personally, the four-day training was “very useful”	65%
I found the meta-training breaks to be “very useful”	79%
I found the binders and other handouts to be “very useful”	93%
I found the videos to be “very useful”	63%
I found the activities to be “very useful”	61%

Training on specific components of reading were also rated highly with the weakest component being fluency.

Trainers Feedback – Specific Components	
Component	Good or Excellent
Phonics	93%
Comprehension	91%
Vocabulary	88%
Phonemic Awareness	88%
Fluency	81%

Participants’ responses suggest a number of ways that the training and the TRA curriculum could be improved including:

- Provide trainers with more background on the Reading First assessments
- Eliminate the highly-scripted approach to the training
- More coverage of phonological and phonemic awareness in the second grade curriculum
- Need to improve the quality of the content and activities in the fluency modules
- Desire for more hands-on vocabulary activities in the training
- More time and emphasis on comprehension

For more detail on results of the feedback survey see “MRFP-004 PAR Spring Training Feedback” (attached).

The most substantial training improvement identified by the Lead Trainers was to provide more time – either within the training or as a follow-up activity – for the trainers to work with each other. This would allow them to support each other, share examples of relevant experience and plan useful training activities to use during their presentations. Lead Trainers also noted that many of the trainers took the initiative to prepare together outside of the training, but this was on their own time and therefore something for which they were not compensated.

Hiring Regional Professional Development Providers

In addition to summer trainers, PAR was responsible for hiring ten regional professional development providers (RPs) to provide ongoing professional development and support to Reading First districts during the school year. The primary role of the RP is to assist in implementation of Reading First in about six elementary schools by reinforcing the lessons taught through the TRA curricula, providing follow-up training, and sharing relevant professional expertise and experience.

A posting for the RP position was placed on the PAR website and efforts were made to alert potentially qualified applicants through various networking channels. Desired skills and background included:

- Masters in reading, special education, or related field
- Classroom teaching experience
- Ability to work independently in an unstructured setting
- Through knowledge of the five components of research-based reading instruction
- Proven skills as a presenter of reading-related professional development

PAR received roughly fifty applications for the RP position. Applications were reviewed using a common rubric and rating system. The review team consisted of two MADOE representatives (Barbara Gardner and Cheryl Liebling), two PAR representatives (Jon Bower and Sandy Jones), one member of the Reading Leadership Team (Linda Rath), and outside specialist (Margaret Ciardi of the Education Development Center). After reviewing applications, the team interviewed about thirty candidates and used a consensus decision-making process to select the final ten.

It is important to note that geographic location was also an important consideration in the review. Those who were hired were not necessarily the ten most highly qualified. In some cases more qualified applicants in the eastern part of the state had to be passed over in the interests of regional coverage.

Originally, the expectation was the RPs would also serve as summer Teacher Reading Academy trainers. However, timing of the applicant review processes were not aligned and PAR ended up hiring and training the summer trainers before the RPs were selected. As things worked out, PAR recruited five of the summer trainers to become RPs. They are considering training the remaining RPs to serve as trainers for future summer TRAs.

MADOE Staffing Enhancements

The Massachusetts Reading First proposal calls for increased staffing levels in the Massachusetts Department of Education's Office of Reading. As of the date of this report, Reading First funding had enabled MADOE to fill one vacant position. Dr. Cheryl Liebling joined MADOE as Director of Reading and Language Arts in April 2003. In this position she is primarily responsible for managing the Massachusetts Reading First program, with additional oversight responsibilities for other state-funded reading programs.

Dr. Liebling holds a Ph.D. in language and literacy from the University of California, Berkeley; an MA in reading and psychology of school subjects from Columbia University, Teachers College; and a BA with distinction from Simmons College where she was an elementary education major. Prior to joining MADOE, Dr. Liebling was a senior research associate with RMC Research Corporation. In that capacity, she provided technical assistance to thirteen states in their preparation of federal applications for Reading First; consulted closely with New York State in its Reading Excellence Act initiative; participated in the design of the federal evaluation of the Reading Excellence Act; and developed a wide range of products related to early reading and standards-based alignment. Dr. Liebling also has prior experience as an assistant professor of education at Rivier College, Nashua, NH; adjunct faculty member at Lesley University and the University of New Hampshire; consulting research scientist

at Bolt Beranek and Newman, Cambridge, MA; classroom teacher and reading specialist; and community school board member.

In addition, MADOE has made attempts to hire an additional reading specialist to work in the Office of Reading and support implementation of Massachusetts Reading First. Unfortunately, none of the applicants to date have been satisfactory and thus, the Department has not been able to add staff in this position. MADOE does intend to repost the position and continue to seek qualified applicants.

Providing Professional Development

Assessment Team Training

Massachusetts held only one professional development activity during the reporting period covered in this report. Assessment training for Round 1 grantees was held in June 2003. Each participating school (including those later deemed ineligible for funding) sent its seven-member assessment team for a two-day orientation to the required assessments. About 425 assessment team members, many of whom were teachers, were trained in the required assessments.

As part of its evaluation plan, the Donahue Institute asked participants to complete a written feedback survey on their training experiences. The data gathered indicate that, overall, the training was a success. The majority of respondents gave positive ratings to individual break-out sessions, the clarity of presentations, the materials used in each session, and the pace and time allocated for each session.

The sessions on DIB ELS and GRADE earned relatively strong ratings, with a large majority of respondents rated those sessions positively (87% and 75% respectively). However, the session on DRP was positively rated by fewer than two-thirds of respondents. For more detail on results of the feedback survey see "MRFP-001. assessment training feedback" (attached).

PD Plans for Summer 2003

Summer Teacher Reading Academies were planned for July and August 2003, with thirteen week-long sessions scheduled for locations around the state. Each academy was structured to offer four days of training on grade-level specific modules adapted from the Texas curriculum with a fifth day focused on student assessment and issues related to English Language Learners.

Participation in the summer TRAs was mandatory for all Round 1 Reading First schools. They were also available to ineligible districts receiving BayState Readers Development Grants and any Round 2 Reading First schools that could coordinate participation on rather short notice.

Regional Provider Training was planned for July and August 2003. This was structured as an initial one week training including an orientation to the Massachusetts Reading First program, the principles of school change, and consulting skills training. That training was followed by weekly day-long follow-up sessions to cover additional topics, including required student assessments. Longer-term the plan is for RP's to have monthly meetings for team building, problem solving and additional training.

Appendix A: Members of the Reading Leadership Team

Members of the Massachusetts Reading Leadership Team as of June 30, 2003

The Chief State School Officer

David P. Driscoll	Commissioner of Education
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State Legislators

The Honorable Robert A. Antonioni	Senate Chairman, Joint Committee on Education, Arts and Humanities
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The Honorable Jo Ann Sprague	Senate member, Joint Committee on Education, Arts and Humanities
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The Honorable Marie P. St. Fleur	House Chairman, Joint Committee on Education, Arts and Humanities
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The Honorable E. Karyn Polito	House member, Joint Committee on Education, Arts and Humanities
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Local Education Agency Representatives

Christine Collins	Assistant Superintendent, Weymouth Public Schools
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Elizabeth Keroack	Assistant Superintendent, Malden Public Schools
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Alberto Molina	Principal, Lawrence Public Schools
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James Shminski	Title I Curriculum Director, Pittsfield Public Schools
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Debra Spinelli	Title I Curriculum Director, Foxborough Public Schools
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Massachusetts Department of Education Staff

Robert Bickerton	Adult Education Director
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Dorothy Earle	Education Specialist, Office of Reading
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Barbara Gardner	Associate Commissioner of School Readiness
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Cheryl Liebling	Director of Reading and Language Arts
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Marcia Mitnacht	Director of Special Education
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Elisabeth Shaefer	Administrator of Early Learning Services
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Barbara Solomon	Title I Director
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Kathleen Rodrigues	Coordinator of the Family Literacy Consortium
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Parent Representative

Kathleen Caldera	North Easton
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Teacher Representatives

Patricia Fairbanks	Special Education Department Head, Bourne Public Schools
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Darci Vogel-Burns	Regional Provider, Massachusetts PAR
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Family Literacy Provider Representative

Patricia Murphy Painchaud	Even Start Family Literacy Coordinator, Lowell
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Higher Education Representatives	
Mary Beth Curtis	Director, Center for Special Education, Lesley University
Vickie Jacobs	Lecturer, Harvard University
Linda Rath	Curriculum Director, PBS/WGBH Boston
John Savage	Professor Emeritus, Boston College
Professional Development Providers	
Jack McCarthy	Managing Editor, Apple Tree Institute for Education Innovation
Marion Sanders	Educational and Clinical Consultant, Gifford School
Adult Education Provider	
Kathleen Quinn	Adult Learning Center, Brockton
Volunteer Organization	
Matthew Veno	Director of Government and External Affairs, The Reach Out and Read National Center
Library Representative	
Kathleen Baxter	Assistant Administrator for Youth Services, Southeastern Massachusetts Library Systems
Early Childhood Representative	
Carolyn Rocheleau	Project Coordinator, Community Partnership of Lowell

Appendix B: Eligibility Criteria

Original Eligibility Criteria (approved 10/2002)

An eligible Massachusetts district for Reading First funds has:

1. One or more of the listed student reading performance outcomes, as demonstrated by the 2001 MCAS 3rd Grade Reading test.
 - a. 50% or more students NOT at Proficient Level; **OR**
 - b. 250 or more students NOT at Proficient Level; **OR**
 - c. 10% or more students at Warning Level; **OR**
 - d. 100 or more students at Warning Level; **OR**

AND (however, in actuality the original eligibility list was drawn as if this read “OR”)

2. One or more of the listed additional criteria listed below
 - a. Empowerment Zone or Enterprise Community; **OR**
 - b. One or more schools identified for school improvement under Title 1, Part A; **OR**
 - c. 15% or more students counted for Title 1, Part A allocations; **OR**
 - d. 1,000 or more students counted for Title 1, Part A allocations; **OR**

Eligible Districts as Defined in Massachusetts’ Proposal for Reading First Funding				
Local School Districts				
Amherst	Fall River	Hull	Quincy	Tisbury
Ayer	Falmouth	Lawrence	Revere	Wales
Boston	Fitchburg	Lowell	Rockland	Ware
Brewster	Florida	Lynn	Salem	Wareham
Brimfield	Framingham	Malden	Savoy	Webster
Brockton	Gardner	Methuen	Shutesbury	Wellfleet
Cambridge	Gloucester	New Bedford	Somerville	West Springfield
Chatham	Greenfield	North Adams	Southbridge	Westfield
Chelsea	Hancock	Northampton	Springfield	Williamsburg
Chicopee	Haverhill	Orange	Sturbridge	Winchendon
Eastham	Holland	Pittsfield	Sunderland	Worcester
Everett	Holyoke	Plymouth	Taunton	
Regional School Districts				
Adams-Cheshire	Chesterfield-Goshen	Gill-Montague	Narragansett	
Athol-Royalston	Dennis-Yarmouth	Hawlemont	Quabog	
Berkshire Hills	Farmington River	Mohawk Trail	Southern Berkshire	

Charter Schools				
Abby Kelley Foster	Community Day	Lowell Community	SABIS International	
Atlantis	Conservatory Lab	Lynn Community	Seven Hills	
Benjamin Banneker	Hilltown	Neighborhood House	Somerville	
Boston Renaissance	Lawrence Family Dev	Robert M. Hughes	South Shore	

Revised Eligibility Criteria (approved 6/13/2003)

An eligible Massachusetts district for Reading First funds has:

3. One or more of the listed student reading performance outcomes, as demonstrated by the 2001 MCAS 3rd Grade Reading test.
 - a. 40% or more students NOT at Proficient Level; **OR**
 - b. 150 or more students NOT at Proficient Level; **OR**
 - c. 10% or more students at Warning Level; **OR**
 - d. 100 or more students at Warning Level; **OR**

AND (however, in actuality the original eligibility list was drawn as if this said “OR”)

4. One or more of the listed additional criteria listed below
 - a. Empowerment Zone or Enterprise Community; **OR**
 - b. One or more schools identified for school improvement under Title 1, Part A; **OR**
 - c. 15% or more students counted for Title 1, Part A allocations; **OR**
 - d. 1,000 or more students counted for Title 1, Part A allocations; **OR**

Previously Eligible Districts Becoming Ineligible Under Revised Criteria				
Local School Districts				
Amherst	Eastham	Holland	Savoy	Wellfleet
Ayer	Falmouth	Hull	Shutesbury	Williamsburg
Brewster	Gardner	Northampton	Sturbridge	Winchendon
Brimfield	Gloucester	Orange	Sunderland	
Chatham	Hancock	Rockland	Tisbury	
Regional School Districts				
Adams-Cheshire	Chesterfield-Goshen	Farmington River	Mohawk Trail	Southern Berkshire
Berkshire Hills	Dennis-Yarmouth	Hawlemont	Quabog	
Charter Schools				
Hilltown	South Shore	Lynn Community (charter revoked 6/2003)		

In addition, one district – Easthampton – which had not been eligible under the original criteria became eligible under the revised criteria.

Appendix C: Phase 1 Awards

Phase 1 Reading First Awards: Academic and Demographic Profile

Round 1 Awards (approved 3/25/2003)

District	NOT Proficient		Warning		Poverty	
	#	%	#	%	#	%
Athol-Royalston Regional	61	40%	9	6%	653	24%
Boston Renaissance Charter	108	73%	44	30%	525	43%
Chelsea	304	69%	53	12%	2533	45%
Chicopee	297	53%	63	11%	1654	17%
Fall River	539	58%	85	9%	5052	29%
Gill-Montague Regional	44	45%	8	8%	365	20%
Haverhill	293	43%	48	7%	1607	17%
Lawrence Family Development	45	75%	7	12%	297	62%
Lawrence	769	69%	215	19%	8198	48%
Lowell Community Charter	27	77%	10	29%	183	59%
Malden	198	50%	36	9%	1105	15%
Methuen	194	36%	27	5%	1227	16%
Neighborhood House Charter	10	62%	2	13%	65	38%
North Adams	108	62%	27	15%	681	26%
Pittsfield	183	38%	10	2%	1856	24%
Plymouth	220	29%	23	3%	1440	14%
Quincy	249	40%	25	4%	1438	13%
Revere	261	54%	35	7%	1492	23%
Robert M. Hughes Academy	13	70%	3	15%	99	54%
Salem	215	49%	40	9%	1337	24%
Somerville	166	44%	19	5%	2292	26%
Springfield	1298	61%	319	15%	13115	43%
Ware	53	48%	6	5%	455	23%
Westfield	205	41%	55	11%	1063	16%
Worcester	1130	57%	282	14%	10256	36%

Round 2 Awards (approved 6/25/2003)						
District	NOT Proficient		Warning		Poverty	
	#	%	#	%	#	%
Brockton	879	64%	192	14%	5723	30%
Cambridge	254	50%	52	10%	1862	19%
Fitchburg	265	52%	46	9%	2171	29%
Lowell	882	66%	201	15%	7188	36%
Seven Hills Charter	28	51%	3	5%	264	40%
Taunton	299	44%	48	7%	1483	16%
Webster	88	56%	5	3%	597	22%

Phase 1 Reading First Awards: Core Curriculum Choices

Round 1 Awards (approved 3/25/2003)			
District	Core Curriculum	District	Core Curriculum
Athol-Royalston Regional	Open Court	North Adams	Scott Foresman
Boston Renaissance Ch	Harcourt Trophies	Pittsfield	Harcourt Collections
Chelsea	Open Court	Plymouth	Houghton Mifflin
Chicopee	Houghton-Mifflin	Quincy	Harcourt Trophies
Fall River	Harcourt Trophies	Revere	Scott Foresman
Gill-Montague Regional	Rigby Literacy	R.M. Hughes Academy Ch	Harcourt Trophies
Haverhill	Harcourt Trophies	Salem	Harcourt Trophies
Lawrence Family Dev Ch	Harcourt Trophies	Somerville	Harcourt Trophies
Lawrence	Success for All	Springfield	Harcourt Trophies
Lowell Community Charter	Success for All	Ware	Houghton Mifflin
Malden	Macmillan/McGraw Hill	Westfield	Rigby/Wright Group
Methuen	Harcourt Trophies	Worcester	Houghton Mifflin
Neighborhood House Ch	Harcourt Trophies		

Round 2 Awards (approved 10/25/2003)			
District	Core Curriculum	District	Core Curriculum
Brockton	Scott Foresman	Seven Hills Charter	Success for All
Cambridge	To be determined	Taunton	Harcourt Trophies
Fitchburg	To be determined	Webster	Open Court
Lowell	Scott Foresman		

Phase 1 Reading First Awards: Annual Budget Profile

Round 1 Awards (approved 3/25/2003)				
District	Award Amount	Participating Schools	K-3 Enrollment (2002-2003)	Award per Student
Athol-Royalston Regional	\$189,232	1	138	\$1,371
Boston Renaissance Charter	\$220,000	1	744	\$296
Chelsea	\$420,000	2	1,221	\$344
Chicopee	\$388,433	2	563	\$690
Fall River	\$790,000	4	747	\$1,058
Gill-Montague Regional	\$200,000	2	231	\$866
Haverhill	\$410,000	3	613	\$669
Lawrence Family Development Charter	\$200,000	1	230	\$870
Lawrence	\$640,000	4	1,010	\$634
Lowell Community Charter	\$210,000	1	358	\$587
Malden	\$210,000	1	394	\$533
Methuen	\$220,000	1	532	\$414
Neighborhood House Charter	\$114,984	1	83	\$1,385
North Adams	\$400,000	2	461	\$868
Pittsfield	\$200,000	1	330	\$606
Plymouth	\$420,000	2	835	\$503
Quincy	\$210,000	1	314	\$669
Revere	\$210,000	1	402	\$522
Robert M. Hughes Academy Charter	\$188,564	1	87	\$2,167
Salem	\$380,000	2	478	\$795
Somerville	\$200,000	1	107	\$1869
Springfield	\$840,000	4	1,475	\$569
Ware	\$210,000	1	390	\$538
Westfield	\$580,000	3	561	\$1,034
Worcester	\$685,000	4	972	\$705
Round 2 Awards (approved 6/25/2003)				
Brockton	\$430,000	2	970	\$443
Cambridge	\$190,000	1	140	\$1,357
Fitchburg	\$220,000	3	572	\$385
Lowell	\$630,000	3	1,100	\$573
Seven Hills Charter	\$210,000	1	302	\$695
Taunton	\$199,344	1	191	\$1,002
Webster	\$219,920	1	559	\$393