

Jeffrey Nellhaus  
 Acting Commissioner  
 of Education

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## Commissioner's Update

January 25, 2008

Dear Superintendents, and Leaders of Charter Schools and Collaboratives:

In this Update I have three announcements and six items for your review.

### Innovative Online Resources for Massachusetts Teachers

I am pleased to announce that Massachusetts is now part of the Thinkfinity State Rollout program. Thinkfinity, <http://www.thinkfinity.org/home.aspx> (formerly known as Marco Polo), is a comprehensive program and online portal that provides teachers with over 55,000 educational resources, including standards-based, grade-specific, K-12 lesson plans and interactive tools and materials.

Through a Verizon Foundation grant to Lesley University and a partnership with the Massachusetts Department of Elementary and Secondary Education, the Department is able to provide training to teachers to use the educational resources available from Thinkfinity. In addition to providing standards-based resources from the nation's leading educational and literacy organizations, this grant from the Verizon Foundation will provide:

- Professional development opportunities to classroom and preservice teachers statewide through onsite and online training
- Resources to create a Massachusetts network of Thinkfinity trainers
- Resources to validate the alignment of Thinkfinity resources with the Massachusetts Curriculum Frameworks

We are pleased that we will be able to train teachers to use Thinkfinity's resources to support student achievement. Educators who are interested in learning to use Thinkfinity resources and/or applying to become a trainer may request an application by sending an email to April Graziano at [aaj.graziano@verizon.net](mailto:aaj.graziano@verizon.net).

### Public Hearings on New Regulations for Child Care and After-School Programs

The Department of Early Education and Care (EEC) will be holding public hearings on proposed *Standards for the Licensure of Small Group, Large Group, and School-age Child Care Programs* in early 2008. Since these standards will apply to After-School Programs licensed by EEC and housed in public school buildings, school districts are encouraged to review and comment on these standards. See attached website links for additional information:  
 Link to the draft regulations:

[http://www.eec.state.ma.us/docs/606\\_CMR\\_7\\_Revised\\_2007\\_12\\_05.doc](http://www.eec.state.ma.us/docs/606_CMR_7_Revised_2007_12_05.doc)

Link to a powerpoint presentation that highlights the significant changes:

[http://www.eec.state.ma.us/docs/RegPresentation\\_2007\\_11\\_20.ppt](http://www.eec.state.ma.us/docs/RegPresentation_2007_11_20.ppt)

Link to the Department of Early Education and Care for Public Hearing information:

<http://www.eec.state.ma.us/>

## Global Education Advisory Council Survey

The Global Education Advisory Council (GEAC) to the Board of Education has created an online survey of global education and international studies for the Commonwealth's schools. The survey can be found at: <http://www.zoomerang.com/survey.zgi?p=WEB22775WJJZ>.

Please be sure to have each of your schools complete the survey before the end of February, 2008. Survey results will be compiled by GEAC and a report will be made through the Commissioner's Update.

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Items Posted at [www.doe.mass.edu](http://www.doe.mass.edu):

1. Health Education in Massachusetts Secondary Schools, 2006



2. Spring 2008 Reading and Writing Test Requirements for Limited English Proficient (LEP) Students in Grades K-2



3. New Features Planned for the Massachusetts English Proficiency Assessment (MEPA) Program



4. 2008 Requirements for the Participation of Students with Limited English Proficiency in MCAS and MEPA



5. Preliminary Report on Current Fiscal Conditions in Massachusetts Public Schools



6. Information Regarding the 2008 American Stars of Teaching



Sincerely,

Jeffrey Nellhaus  
Acting Commissioner of Education



## **Health Education in Massachusetts Secondary Schools, 2006**

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Survey Results  
January, 2008

**Massachusetts Department of Education**  
350 Main Street, Malden, MA 02148  
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Jeffrey Nellhaus  
Acting Commissioner of Education

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Jeffrey Nellhaus  
Acting Commissioner of Education

# The Commonwealth of Massachusetts Department of Education

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January 24, 2008

Dear Colleagues, Parents, and Students:

We are pleased to release this report, *Health Education in Massachusetts Secondary Schools, 2006*. The Massachusetts Department of Education gathered the information presented in this report through a survey of the principals and lead health teachers in all public middle, junior/senior, and senior high schools in the Commonwealth. Because of very high response rates we are confident that the results reported here accurately represent the status of health education in Massachusetts secondary schools.

School health education has an important role to play in ensuring that children and adolescents gain the knowledge and develop the skills they need to lead safe and healthy lives and avoid risk-taking.

Thank you for your continued commitment to improving the health, safety, and achievement of all Massachusetts youth.

Sincerely,

Jeffrey Nellhaus  
Acting Commissioner of Education

## ***Health Education in Massachusetts Secondary Schools, 2006***

**Abstract:** *Health education is taught as a required course in approximately four-fifths of Massachusetts secondary schools, representing a decrease since 2002, especially at the middle school level. In schools that do include health education courses, health teachers cover a wide variety of content topics and also teach skills to promote health and reduce risk-taking or unhealthy behavior. Most include activities that ask students to apply health skills in community settings or real-life situations and most use some form of performance-based assessment to gauge their students' mastery of health skills. Finally, most health teachers make efforts to involve parents in health education and to work with other school staff on the development and implementation of health education activities, though some of these efforts have declined in the past five years.*

**Health Education: An Overview.** The primary purpose of classroom health education is to give students the knowledge and skills they need to practice health-enhancing behaviors throughout life<sup>1</sup> and to avoid or reduce health risks. In public health terms, health education is the most basic form of primary prevention. Research has shown that high quality comprehensive health education contributes to improvements not only in students' knowledge, but also in their health skills and practices.<sup>2-4</sup>

Information below concerning health education in Massachusetts schools was drawn from the 2006 *School Health Profiles*, developed by the U.S. Centers for Disease Control and Prevention for use by states. In February 2006, the Massachusetts Department of Education mailed two *Profiles* surveys, one questionnaire for principals and another for lead health teachers, to every public middle, junior/senior, and senior high school in the Commonwealth. Usable surveys were obtained from 661 principals and 659 health teachers, an 88% response rate in each case.

### **Laws, Regulations, Standards, and Guidelines Related to School Health Education.**

Massachusetts state law (MGL Chapter 71, Section 1) stipulates that various topics should be taught in health education and should be considered acceptable use of time in learning. The law does not stipulate that health education be taught as a separate course, but in November 2007 the Board of Education included health education among the list of core courses that could be chosen as electives by high school students wishing to align their program of study with the Board of Education's MassCore recommendations. In Massachusetts, whether or not school districts require courses in health education and what they include in those courses are matters of local control. State law provides an opportunity for parents to exempt their children from health education classes without penalty to the student.

Two documents offer guidance related to school health education. The *Massachusetts Comprehensive Health Curriculum Framework*<sup>5</sup> outlines the topics that should be included in a comprehensive K-12 curriculum and is organized primarily around 14 content/topic

standards: growth and development, physical activity and fitness, nutrition, reproduction/sexuality, mental health, family life, interpersonal relationships, disease prevention and control, safety and injury prevention, substance use/abuse prevention, violence prevention, consumer health and resource management, ecological health, and community/public health. As a complement to the *Framework*, the revised *National Health Education Standards*<sup>6</sup> focus on skills that can be applied across content areas. These include comprehending concepts related to health promotion and disease prevention; accessing valid health-related information and services; using interpersonal communication skills to enhance health or reduce health risks; using decision-making skills to enhance health; using goal-setting skills to enhance health; practicing health-enhancing behaviors; and advocating for personal, family, and community health. The *National Health Education Standards* also outline characteristics of effective school health education, based on reviews of published research.

## Findings from the 2006 School Health Profiles

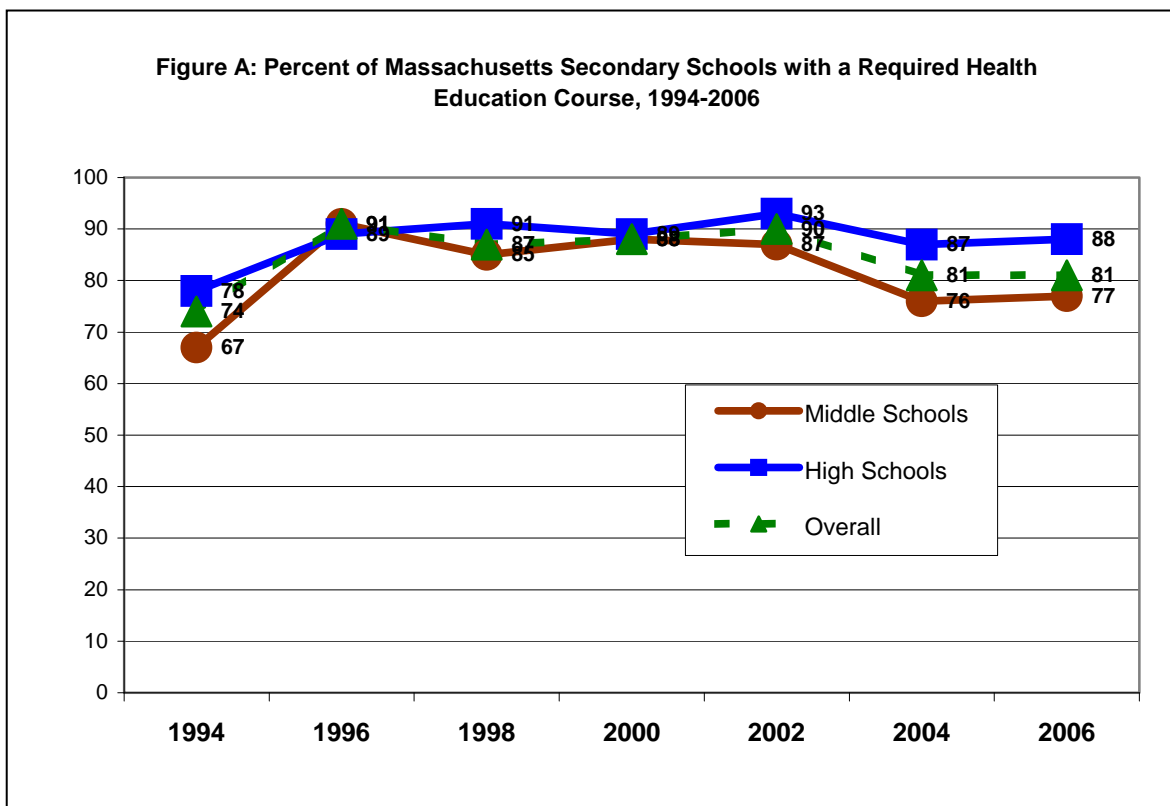
### Course Requirements and Time in Health Education

**In 2006, over four in five Massachusetts secondary schools (86%) required some health education for students, and 81% required students to take at least one health education course.** A health education course was defined as a separate semester-, quarter, or year-long unit of instruction for which the student receives credit. It did not include health education units or lessons integrated into other subjects. (Figure A, next page)

- ✓ A health education course was required more often in high schools (88%) than in middle schools (77%) or combined junior/senior high schools (82%).
- ✓ Requirements for health education rose during the years that state Health Protection Fund grants were provided to districts (1994-2002), but have fallen somewhat since these funds were eliminated in Summer 2002.
- ✓ In 2006, 56% of middle schools and 43% of high schools required two or more health education courses.
- ✓ A health education course is most likely to be required in 7<sup>th</sup> or 8<sup>th</sup> grade (65% and 67% of schools with these grades, respectively), and least likely to be required in the final years of high school (20% of 11<sup>th</sup> grade, 15% of 12<sup>th</sup> grade).
- ✓ In schools requiring at least one health class, middle school courses averaged 41 class periods of 49 minutes. High school courses averaged 65 class periods, 58 minutes in length.

**Although students can be excused from all or any part of health education at parental request, in actuality exemptions are rare.**

- ✓ 38% of principals reported that no students had been exempted by parental request; 54% reported that 1% or less of students were exempted.



Note: Combined junior/senior high schools are not shown above, although they are included in the total.

**Health Education Curriculum, Instruction, and Assessment.** *The quality of health education instruction is tied to not only to the time allocated for the course, but also to the curriculum and quality of instruction. This includes a foundation in standards and skills with a plan for assessment of students. District plans for a strong health education program should include (1) a written scope and sequence outlining skills to be taught at each grade level, and (2) a written curriculum that spells out in greater detail what should be taught in each course. Course content should be aligned with state and national standards, and course content over different grades should be sequenced to ensure that young people develop the knowledge, skills, and dispositions that will lead to healthy behaviors throughout their lives. Curricula should be formally reviewed at least every five years.*

**Most required health courses are aligned with Massachusetts and national standards.** Most health teachers in schools with required health education (95%) say that the main health course in their schools is aligned with the *Massachusetts Comprehensive Health Curriculum Framework*, which outlines standards for 14 major areas of course content.

- ✓ 78% of teachers also report that their courses are aligned with the *National Health Education Standards*, organized primarily around skills that can be applied to any content topic.

**Most schools include instruction to improve students' health-related skills.** The percent of schools reporting that they taught health skills in a required health course are as follows:

- ✓ Skills for finding valid information or services related to personal health and wellness (76% of schools)
- ✓ Skills for recognizing the influence of media on personal health and wellness (78%)
- ✓ Communication skills, such as how to ask for assistance with a health problem (76%)
- ✓ Decision-making skills, such as deciding to get appropriate health screenings (76%)
- ✓ Goal-setting skills, such as setting a goal for improving personal health habits (78%)
- ✓ Conflict resolution skills, such as ways of resolving interpersonal conflicts without fighting (76%)
- ✓ Skills for resisting peer pressure to engage in unhealthy behavior (82%)

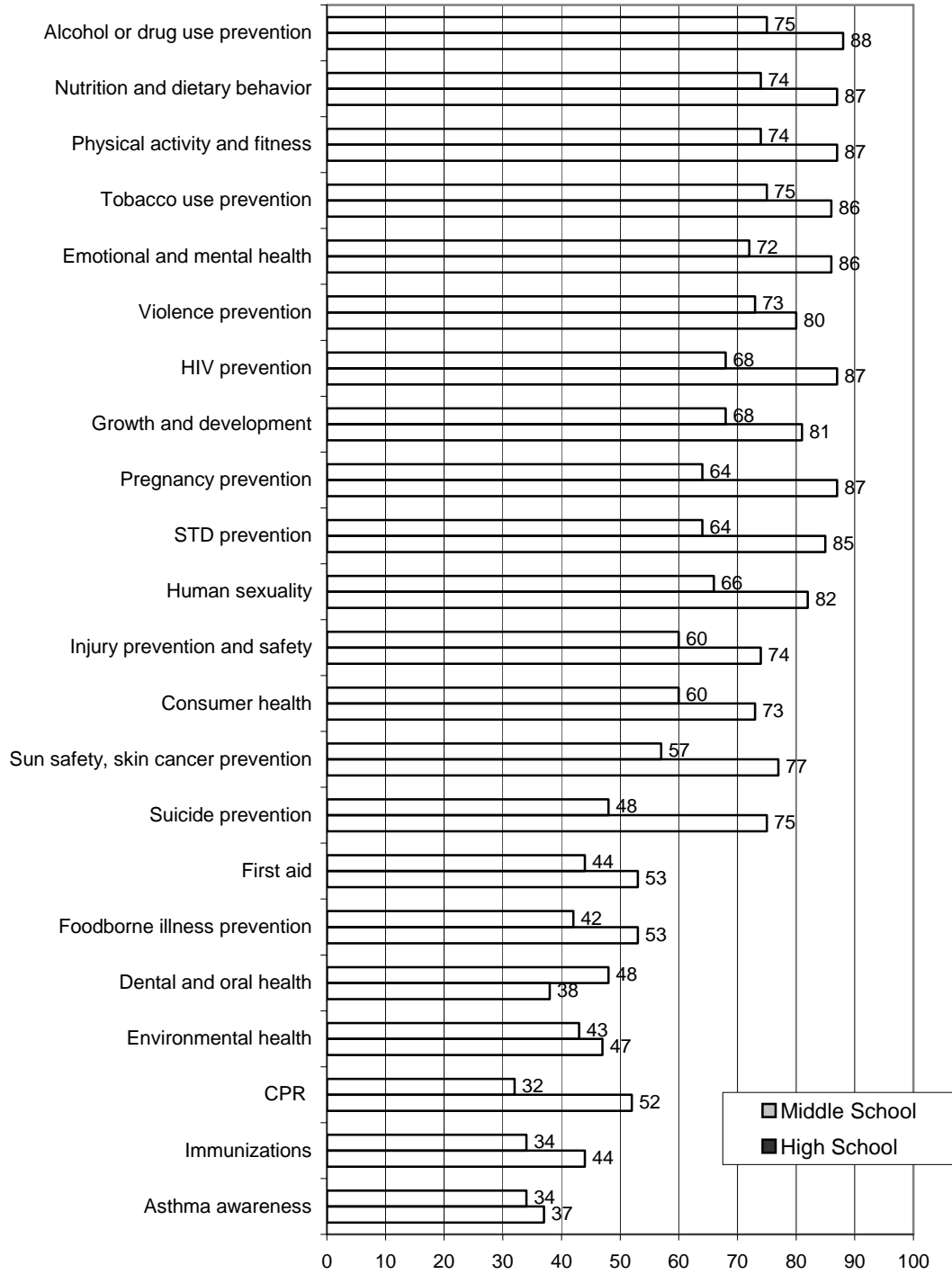
**Middle and high school health education courses cover a wide range of topics.** (See Figure B, next page.)

- ✓ In schools that *do* have a required health course, the most common content areas are alcohol and drug use prevention (98%), nutrition and dietary behavior (98%), physical activity and fitness (98%), tobacco prevention (97%), and emotional and mental health (96%). Because not all schools have required health courses, the percent of all schools covering these topics, shown in Figure B, is much lower.
- ✓ On average, teachers with a health course reported spending:
  - 12 class periods on tobacco, alcohol, and other drug use prevention
  - 13 periods on nutrition, dietary behavior, physical activity, and fitness
  - 9 periods on HIV, STD, pregnancy prevention, and sexuality
  - 6 periods on violence prevention and conflict resolution
  - 6 periods on mental health issues and suicide prevention

**For the most part, health education curricula appear to be “home-grown,” developed at the local (district or school) level.**

- ✓ Fewer than half of lead health education teachers (41%) report being required to purchase a commercially developed curriculum and less than one-third (29%) are required to use commercially developed student textbooks.
- ✓ About three quarters of teachers (73%) indicated that their health education curriculum had been formally reviewed within the past five years.

**Figure B: Percent of Massachusetts Schools Teaching Selected Topics in a Required Health Class, 2006**



**Not all schools have a scope and sequence for health education.** Only two-thirds (67%) of teachers indicated that there was a written “scope and sequence” for health education that covered all grades in the district. This suggests that in many instances health education may not be coordinated across grade levels.

**Instruction.** *Effective instruction in health education builds personal and social competence by emphasizing the skills students need to deal with social pressures, avoid or reduce risk-taking, and practice health-enhancing behaviors. Skills need to be explained, modeled, practiced using real-life scenarios, and reinforced. Instructional strategies and learning experiences that are student-centered, interactive, and experiential are more likely than those simply conveying factual information to have a positive effect on healthy behavior.*<sup>6</sup>

**Health education teachers use a variety of teaching methods.** The largest amount of time is spent on lecture or direct instruction, with less time having students engaged in role-play, simulation, or skills practice (e.g., practicing refusal skills). The approximate proportion of time health teachers spend using various methods of instruction in their main health course is listed below:

- ✓ 24% of class time is spent on lecture or direct instruction
- ✓ 22% of time in group discussion
- ✓ 15% of time on cooperative group activities
- ✓ 13% of time is spent on videos, demonstrations, and guest speakers
- ✓ 11% of time is spent on individual projects or work
- ✓ 10% of time is used for role-play, simulation, or skills practice with students, and
- ✓ 8% of class time is spent on tests and other activities

**Most health teachers in schools with a required health course have students engage in activities outside of class that involve the real-life application of health-enhancing behaviors or skills.**

- ✓ 82% ask students to complete homework or projects that involve family members
- ✓ 72% ask students to identify advertising designed to influence health behaviors
- ✓ 54% ask students to advocate for health-related issues
- ✓ 48% ask students to identify potential injury sites at school, home, or in the community
- ✓ 44% ask students to gather information about health services available in the community
- ✓ 26% ask students to visit a store to compare prices of health products
- ✓ 20% ask students to participate in or attend a community health fair

**Assessment.** Although health education is not included as a tested subject in the Massachusetts Comprehensive Assessment System (MCAS) required of all students, the Department of Education has directed districts to develop their own assessment system for health education. A strong assessment system in health education, as in any subject, demonstrates to the school community, to parents, and to students themselves that young people are achieving important standards.

**Fewer than half (47%) of schools require teachers to use performance assessments (that is, assessment of student skills) in the health education classroom.**

**Even so, most teachers (83%) report assessing students for both knowledge and skills.**

- ✓ Approximately two-thirds (64%) of health education teachers report that students are assessed on health-related skills via constructed response items that are scored using rubrics that are based on national or Massachusetts standards.
- ✓ 83% of teachers report that they assess health-related skills using their own classroom standards.
- ✓ Four in five (83%) of health teachers assess content knowledge through multiple choice or other selected response methods.
- ✓ Almost all (90%) of teachers use performance tasks or events to assess their students.

**Professional Preparation and Development of Health Education Teachers.** *In health education, as in any discipline, instruction should be delivered by a certified teacher with a strong background in the subject and in appropriate instructional methods. Regular participation in professional development is essential for helping teachers stay up-to-date with current information in the field and helping them hone teaching skills and instructional approaches.*

**Most, but far from all, health teachers report being licensed in health education and have received professional preparation in health education.**

- ✓ Approximately three-quarters (77%) of lead health education teachers in Massachusetts are certified to teach health education.
- ✓ Approximately two-thirds (62%) of lead health education teachers report having their major professional preparation in health education or health and physical education combined.
- ✓ Approximately one-tenth (11%) of lead health education teachers report having their major professional training in physical education only and 8% report having a their major professional preparation in nursing.

- ✓ The majority of health teachers (57%) indicate that they have 10 or more years of experience teaching health education, 16% have 6 to 9 years, and 28% have five years or less experience.

**Almost all teachers report that they have received some training or professional development within the past two years, but even more would like additional training.**

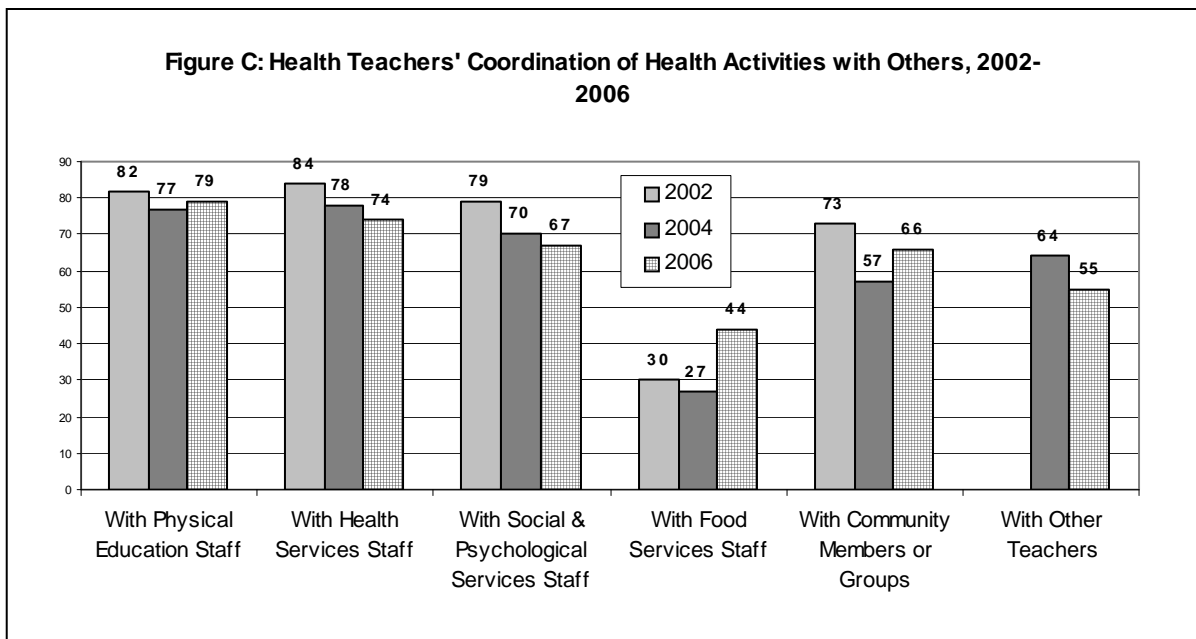
- ✓ The most common topics on which health teachers have received recent training are cardiopulmonary resuscitation (CPR)(64%), violence prevention (61%), alcohol and drug use prevention (48%), first aid (46%), nutrition (44%), and physical activity and fitness (45%).
- ✓ The majority of teachers want more training on health related topics such as suicide prevention (82%), violence prevention (81%), alcohol and drug prevention (79%), emotional and mental health (79%), nutrition and dietary behavior (76%), human sexuality (75%), and STD and HIV prevention (74% and 71%, respectively).
- ✓ Teachers also asked for additional training on teaching skills for behavior change (82%), assessing or evaluating students in health education (81%), using interactive teaching methods such as role plays or cooperative group activities (72%), and encouraging family and community involvement (71%). Fewer than half had received recent training on any of these topics.
- ✓ Teachers were also interested in receiving staff development on how to teach students with physical, mental, or cognitive disabilities (69%) and those of various cultural backgrounds (65%).

**Coordination and Family/Community Involvement.** *Health education is most effective when it is coordinated with other school health-related programs and when families and community members are informed and involved.*

**Almost all teachers attempt to involve parents and families in health education, although these efforts have decreased somewhat since 2002.**

- ✓ Four in five teachers (80%) provide families with information about school health education, down from 87% in 2002.
- ✓ One third of health teachers (33%) have met with the PTA/PTO or other parent organizations to discuss school health education, down from 43% in 2002.
- ✓ Over one quarter (27%) have invited family members to attend health education classes, down from 35% in 2002.

Health teachers work with other school staff and community groups to coordinate health education activities. (Figure C, below)



- ✓ The majority of health teachers (79%) reported working with physical education teachers on health education activities.
- ✓ Most health teachers reported working with school health services, social services, and counseling/mental health staff, but less so than in previous years.
- ✓ Coordination of health education activities with food services staff rose significantly, to 44%. This increase may be due to participation of both food services and health teachers on committees to develop their district's school wellness policy, as required by Section 204 of the federal *Child Nutrition and WIC Reauthorization Act* of 2004.

### Recommendations

This report highlights several areas of concern. Most importantly, the decrease in schools with a required health education course is troubling, especially since these declines have been sharpest at the middle school level when young adolescents may be experimenting with behaviors that put their health and futures at risk. Many young people are not learning the skills and information that they need to stay healthy.

- School districts should have a minimum of one course in health education at both the middle and high school levels.

Second, the significant minority of teachers reporting no health education scope and sequence or no recent review of the health curriculum is a problem.

- Districts should develop a system-wide health education scope and sequence, based on state and national standards, that is reviewed periodically to ensure that content being taught is consistent with data and the needs of students in the district.

Third, although health-related skills are included in most health education courses, they are not always assessed nor are appropriate effective, interactive teaching methods usually emphasized.

- Teaching and assessment of skills in the health education classroom should be promoted and supported as much as possible.

Fourth, health teachers indicate a strong desire for more professional development than they are receiving, especially in the areas of assessment, skills teaching, and parent involvement.

- Continuing professional development for health education teachers should be supported by districts to ensure a quality educational experience for all students.

Finally, school health education is most likely to be effective when it is supported by families and communities.

- Schools and districts should encourage increased outreach to parents and increased coordination of school and community efforts to strengthen school health programs and foster the healthy development of all students.

### **Contacts**

For questions about Massachusetts health education requirements or information about professional development opportunities and materials related to school health education, contact:

Holly Alperin  
Comprehensive Health Education Coordinator  
Massachusetts Department of Education  
[halperin@doe.mass.edu](mailto:halperin@doe.mass.edu) 781-338-6308

The Massachusetts Coordinated School Health listserv (MCSH listserv) distributes information about professional development offerings, materials, and other resources related to health education and other school health programs. To subscribe, contact Holly Alperin at [halperin@doe.mass.edu](mailto:halperin@doe.mass.edu).

## References

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4. Kirby, D., Short, L., Collins, J., Rugg, D., Kolbe, L., Howard, M., Miller, B., Sonenstein, F., & Zabin, L. (1994). School-based programs to reduce sexual risk behaviors: A review of effectiveness. *Public Health Reports*, 109(3), 339-360.
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[www.doe.mass.edu/frameworks/health/1999](http://www.doe.mass.edu/frameworks/health/1999)
6. Joint Committee on National Health Education Standards (2007) *National health education standards: Achieving excellence* (2<sup>nd</sup> Edition). Atlanta, GA: American Cancer Society.

**Acknowledgment:** The development of *Health Education in Massachusetts Secondary Schools, 2006* was supported by funds made available to the Massachusetts Department of Education through Cooperative Agreement number U87-CCU122623 from the Division of Adolescent and School Health, U.S. Centers for Disease Control and Prevention (CDC).

ESE Phone: 781-338-3000

## EVENTS CALENDAR

November 2008						
S	M	T	W	T	F	S
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

## NEWS/EVENTS SEARCH

Keyword:

Dates:

 Past 30 days

 Past 90 days

 Date Range

Start:

End:



## Spring 2008 Reading and Writing Test Requirements for Limited English Proficient (LEP) Students in Grades K-2

To: Superintendents and Principals of Title III Districts

Copy: English Language Learner (ELL) Program Directors in Title III Districts

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: January 24, 2008

In order to meet the federal requirement to test LEP students in Kindergarten through grade 2 in reading and writing, the Department will require that LEP students in grades K-2 in Title III districts be tested in reading and writing using the IDEA Proficiency Test (IPT) in spring 2008, as they were last spring.

### Overview of the IPT

The IPT is a standardized assessment developed specifically for English language learners, which includes age-appropriate components for students in the lower grades.

A small sample of questions from previous IPT tests will be posted on February 4 at [www.doe.mass.edu/mcas/mepa/?section=admin](http://www.doe.mass.edu/mcas/mepa/?section=admin).

### IPT Test Shipment and Administration Information

The Department will send the IPT test materials to schools in Title III districts, based on the number of students in grades K-2 reported to the Department as LEP in the October 2007 SIMS. Student labels (based on October 2007 SIMS reporting) and instructions for administering the tests and returning test materials will be included in this shipment. **Schools will be instructed to test only those students for whom labels have been provided.** Test materials are scheduled to arrive in schools on or about March 3, at the same time as the school's shipment of pre-ordered MEPA test materials,

The testing window for the IPT will be March 3-19, 2008. Materials must be returned on or before Friday, March 21.

**IPT sessions are untimed, but the general guidelines for testing time are listed below:**

Test	Testing Time Guidelines
K-1 Reading	30-45 minutes (small group administration - up to 5 students)
K-1 Writing	10-30 minutes (small group administration - up to 5 students)
Grade 2 Reading	45-80 minutes (large group administration)
Grade 2 Writing	25-60 minutes (large group administration)

I encourage you to share this information with your faculty and staff, particularly those involved in the instruction of LEP students. If you have questions or need assistance, please contact the Department's Student Assessment Office at 781-338-3625.

Thank you for your attention to this matter.

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Spring 2008 Update

*Requirements for  
the Participation of  
Students with  
Limited English Proficiency  
in  
MCAS and MEPA*

Massachusetts Department of Education



*This document was prepared by the  
Massachusetts Department of Education  
Jeffrey Nellhaus  
Acting Commissioner of Education*

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## Commissioner's Foreword

January 2008

Dear Colleagues:

I am pleased to present the spring 2008 update of the *Requirements for the Participation of Students with Limited English Proficiency in MCAS and MEPA*. All students who are designated as Limited English Proficient (LEP) are required to participate in statewide tests according to the guidelines outlined on the following pages.

All LEP students in grades 3-12 must participate in the spring 2008 MEPA-R/W, including those students who took the MEPA tests in the fall of 2007. In addition, LEP students in grades K-2 in Title III districts will be assessed in reading and writing using the IDEA Proficiency Test. All LEP students in K-12 must be assessed in listening and speaking using the MELA-O. As a reminder, in order to receive an overall MEPA score, a student must be assessed in all four areas: reading, writing, speaking, and listening.

Retraining of Qualified MELA-O Trainers (QMTs) began in spring 2007 and will continue through January 31, 2010. These retraining sessions will enable QMTs and QMAs to collect more accurate and reliable speaking and listening scores for English language learners.

We continue to update our list of approved word-to-word dictionaries on MCAS tests. The most recent list is posted on the Department's Web site at [www.doe.mass.edu/mcas/2008/admin](http://www.doe.mass.edu/mcas/2008/admin).

Please contact Student Assessment Services at 781-338-3625 or [mcas@doe.mass.edu](mailto:mcas@doe.mass.edu) for additional information on statewide testing.

Sincerely,

Jeffrey Nellhaus  
Acting Commissioner of Education

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# **I. Overview of Testing Requirements for Limited English Proficient (LEP) Students**

All students who are designated as LEP must participate in MCAS and MEPA tests scheduled for their grades. Guidelines for participation in statewide tests appear on the following pages.

## **A. Definition of an LEP Student**

A limited English proficient (LEP) student is defined by the Department of Education as “a student whose first language is a language other than English and who is unable to perform ordinary classroom work in English.”

When a parent declines a language support program or service for a student identified as LEP, the student is still considered LEP. Students identified as LEP by their districts are required to participate in statewide tests according to the guidelines included in this document.

## **B. Identification and Reporting of LEP Students**

Districts are required to have a procedure in place to assess the English proficiency of all students whose first language is not English in order to determine if they are LEP (603 CMR 14.02). As part of this procedure, students should be assessed in the four domains of reading, writing, listening, and speaking. Information on identifying new LEP students is available on the Department’s Web site at [www.doe.mass.edu/ell/sei/identify\\_lep.html](http://www.doe.mass.edu/ell/sei/identify_lep.html). If you have questions regarding the **identification and initial assessment of LEP students**, please contact staff in the Office of Language Acquisition at 781-338-3535.

When reporting student enrollment to the Student Information Management System (SIMS) in October, March, and June, districts must identify students who are LEP. Districts are responsible for updating these enrollment figures for each reporting period.

## II. Participation of LEP Students in MCAS

### A. MCAS Participation Requirements for LEP Students

All LEP students must participate in MCAS tests scheduled for their grades regardless of the program and services they are receiving or the amount of time they have been in the United States. The sole exception to this requirement applies to first-year LEP students (i.e., students who first enrolled in school in the United States **after March 1, 2007**). While schools have the option of testing first-year LEP students in English Language Arts and History and Social Science/U.S. History, all first-year LEP students must be assessed in Mathematics and Science and Technology/Engineering as shown in the table below. Results for first-year LEP students are **not** included in MCAS school and district summary results.

**Table 1**  
**Spring 2008 Participation Requirements in MCAS Tests**

	Content Area of Test			
	English Language Arts	Mathematics	Science and Technology/Engineering	History and Social Science/U.S. History
<b>Participation Requirements for First-Year LEP Students</b>	<i>Optional<sup>1</sup></i>	Required	Required	<i>Optional</i>
<b>Participation Requirements for All Other LEP Students</b>	Required	Required	Required	Required

#### English/Spanish Tests

A Spanish-speaking LEP student in grade 10 who has been enrolled in school in the continental United States for **fewer than three years** may choose to take the English/Spanish version of the grade 10 Mathematics test if he/she can read and write in Spanish at or near grade-level. English/Spanish versions of the Mathematics test are available for the grade 10 test and retest only. The designated test administrator must be fluent in both English and Spanish.

### B. Use of Word-to-Word Dictionaries on MCAS Tests

Any student who *currently* is LEP or *has been* identified as LEP in the past may use an approved bilingual word-to-word dictionary on MCAS tests. Dictionaries permitted for this purpose are strictly limited to those that provide word-to-word translations: dictionaries that include definitions, synonyms, antonyms, phrases, and other information are strictly prohibited. A list of approved bilingual dictionaries can be found on the Department's Web site at [www.doe.mass.edu/mcas/2008/admin](http://www.doe.mass.edu/mcas/2008/admin). Electronic dictionaries are not allowed.

**Please note that all dictionaries are prohibited for the MEPA administration.**

<sup>1</sup> provided that the student has participated in MEPA.

## C. Participation of LEP Students with Disabilities in MCAS

LEP students with disabilities must participate in MCAS by taking either

- the MCAS test(s) with or without accommodations  
OR
- the MCAS Alternate Assessment (MCAS-Alt).

The LEP student's Individualized Education Program (IEP) Team or 504 team must determine how the student will participate in MCAS testing and must document this information in the student's IEP or 504 plan.

In reporting school and district Adequate Yearly Progress (AYP) results, scores for these students are reported with both the scores of students with disabilities and those of LEP students.

For additional information about MCAS for students with disabilities, please refer to the Department publication, *Requirements for the Participation of Students with Disabilities in MCAS*, available on the Department's Web site at [www.doe.mass.edu/mcas/participation](http://www.doe.mass.edu/mcas/participation).

Table 2 shows reporting specifications for MCAS and AYP for first-year LEP students.

**Table 2**  
**First-Year LEP Students**  
**Reporting Specifications for MCAS and AYP**

	<b>Content Area of Test</b>		
	<b>English Language Arts</b> <b>(Testing optional)</b>	<b>Mathematics</b> <b>(Testing required)</b>	<b>Science and Technology/ Engineering</b> <b>(Testing required)</b>
<b>Reporting Student MCAS Results</b>	Student item analysis (if tested); no scaled scores or performance level scores	Student item analysis only	Student item analysis only
<b>Reporting Participation for AYP</b>	Counted as <i>participating</i> whether tested or not. To be counted as participating, student must participate in MEPA	Counted as <i>participating</i> unless absent	Not factored into AYP
<b>Reporting Performance and Improvement for AYP</b>	Not included in <i>Composite Performance Index (CPI)</i> ratings or <i>Improvement</i> determinations	Not included in <i>Composite Performance Index</i> ratings or <i>Improvement</i> determinations	Not factored into AYP

## **D. High School Competency Determination**

In order to graduate from high school, all students, including students with limited English proficiency are required to earn a Competency Determination in English Language Arts, Mathematics, and Science and Technology/Engineering (STE) as well as meet all local graduation requirements. To earn a Competency Determination, a student must earn a scaled score of 220 or higher on the MCAS grade 10 English Language Arts and Mathematics tests and pass an end-of-course test in Science and Technology/Engineering with a score of 220 or higher. Beginning with the class of 2010, students who score between 220 and 238 in English Language Arts and Mathematics must also complete an Educational Proficiency Plan (EPP). Additional information is available on the Department's Web site.

Students eligible to take the English/Spanish version of the MCAS grade 10 Mathematics test can meet the Competency Determination requirement in Mathematics through that test, but must also pass ELA and STE tests in English. Students who fail one or more of the required tests will be offered multiple testing opportunities.

Since the Competency Determination requirement may present a challenge for LEP students who have recently enrolled in a U.S. school, some LEP students may need to continue their education beyond grade 12 in order to attain the requisite knowledge and skills in English, mathematics, and science and technology/engineering. After grade 12, students who need to pass one or more MCAS test required for graduation can take the MCAS retest(s) or an STE test at the school in which they were last enrolled. In addition, students may ask school staff if they are eligible for an MCAS performance appeal.

### III. Participation of LEP Students in MEPA

The Massachusetts English Proficiency Assessment (MEPA) measures the performance of LEP students and the progress they are making toward English proficiency. MEPA is aligned with the learning standards in the *English Language Proficiency Benchmarks and Outcomes for English Language Learners* (available on the Department's Web site at [www.doe.mass.edu/ell/benchmark.pdf](http://www.doe.mass.edu/ell/benchmark.pdf)). MEPA is composed of two assessments: the MEPA-R/W, which measures reading and writing, and the MELA-O, which measures listening and speaking. The MELA-O is a locally-administered assessment.

**The use of bilingual and all other types of dictionaries is prohibited on all MEPA tests.**

#### A. Participation Requirements for MEPA-R/W and MELA-O

All enrolled LEP students in grades K-12 must participate in English proficiency assessments, regardless of the program they are enrolled in or the number of years they have been enrolled in U.S. schools. The only exceptions involve LEP students who meet certain conditions that are listed on the following page.

Student participation requirements in MEPA-R/W and MELA-O by grade are listed in Table 3.

**Table 3**  
**Spring 2008 Participation Requirements in**  
**the Massachusetts English Proficiency Assessment (MEPA)**

Test	LEP Students Required to Participate in the Spring 2008 MEPA
MELA-O	<ul style="list-style-type: none"><li>• All LEP students in grades K-12</li><li>• All formerly LEP (FLEP) students in grades K-12 who were reported as LEP in the October 2007 SIMS</li></ul>
MEPA-R/W	<ul style="list-style-type: none"><li>• All LEP students enrolled in grades 3-12</li><li>• All formerly LEP (FLEP) students in grades 3-12 who were reported as LEP in the October 2007 SIMS</li></ul>

With the exception of students who were designated as LEP in the October 2007 SIMS, **former LEP (FLEP) students** do not participate in MEPA.

A very small number of LEP students are not required to participate in the spring 2008 MEPA-R/W tests, as described below:

### **MEPA-R/W**

Students in the following categories are not required to participate in MEPA-R/W:

- students with a medically documented absence
- students who require unavailable accommodations, such as Braille tests or an electronic text reader, unless another appropriate accommodation (i.e., reading aloud) would allow them to participate
- students who have an IEP indicating that their primary disability is “deaf or hard of hearing” and require the administration of Sessions 1 and 2 of the Reading and/or Writing tests
- students with significant disabilities who would participate in an alternate assessment because their IEP or 504 team has determined that they are unable to take the standard MEPA-R/W test. (However, students taking an alternate assessment must participate in MELA-O.)

### **MELA-O**

Students in the following categories are not required to participate in MELA-O:

- students with a medically documented absence
- students who have an IEP indicating that their primary disability is “deaf or hard of hearing.”

## **B. Administering the MEPA-R/W**

The Massachusetts English Proficiency Assessment–Reading/Writing (MEPA-R/W) test is administered to all LEP students in grades 3-12. The test consists of separate Reading and Writing tests at the following grade spans: 3-4, 5-6, 7-8, and 9-12.

### **MEPA-R/W Test Sessions for LEP Students in Grades 3-12**

While the reading and writing tests for each grade span consist of three test sessions, each LEP student will take only **two adjacent sessions** in Reading and **two adjacent sessions** in Writing. Table 4 provides a guide for determining the appropriate test sessions for each student. Separate decisions must be made for Reading and Writing.

**Table 4**  
**Assigning LEP Students to Appropriate**  
**MEPA Reading and Writing Test Sessions**

<b>Schools should consider administering</b>	<b>If the student's reading/writing skills are:</b>
Sessions 1 and 2	Beginning to Early Intermediate
Sessions 2 and 3	Intermediate to Transitioning

Prior to test administration, principals or their designees must determine which **two** sessions of the Reading and Writing tests are most appropriate for each student. Consideration should be given to the following:

- the student's scores on previous MEPA tests
- the student's scores on English proficiency assessments used by the district
- observations of staff working closely with the student based on the English Language Proficiency Level descriptors presented in the *English Language Proficiency Benchmarks and Outcomes for English Language Learners*

### **C. Administering the IPT to K-2 Students in Title III Districts**

All districts receiving **Title III funds** must test LEP students in K-2 using the IDEA Proficiency Test (IPT). IPT tests must be administered to K-2 students who were reported as LEP in the October 2007 SIMS submission. Districts will receive labels and test materials for these students.

In accordance with NCLB requirements, beginning in spring 2009 MEPA reading and writing tests will be administered to all LEP students in grades K-2.

### **D. Administering the MELA-O**

The Massachusetts English Language Assessment-Oral (MELA-O) is administered to all LEP students in grades K-12. A qualified MELA-O administrator (QMA) or trainer (QMT) evaluates a student's listening and speaking skills in a classroom setting. Using the MELA-O Scoring Matrix, the QMA or QMT observes the student performing authentic classroom tasks and rates the student's levels of comprehension (listening) and production (speaking). Only QMAs and QMTs are authorized to administer the MELA-O.

A list of qualified QMAs and QMTs is available on the Department Web site at [www.doe.mass.edu/mcas/mepa/melao\\_list.xls](http://www.doe.mass.edu/mcas/mepa/melao_list.xls). Any district that does not have the capacity to administer the MELA-O to each enrolled LEP student must make arrangements with a qualified administrator or trainer in another district.

### **E. Recording MELA-O Scores**

Test administrators will record MELA-O scores on MEPA-R/W answer booklets for all LEP students in grades 3-12, including students who are taking an alternate assessment. Instructions for recording MELA-O scores for students in K-2 will be posted on the Department's Web site. MELA-O scores for students taking the IPT will be reported on IPT student information booklets.

### **F. Retraining Qualified MELA-O Trainers and Administrators**

All QMTs and QMAs must be retrained using new student video samples and training materials. QMTs and QMAs, regardless of when they were originally qualified, are required to pass a new qualifying test by January 31, 2010, in order to retain their status as a MELA-O trainer or administrator. Information about retraining sessions for QMTs will be posted on the Department's Web site. Once QMTs are retrained, they are responsible for conducting retraining sessions for QMAs in their districts.

## IV. Available Resources

For **policy questions** regarding the assessment of LEP students, please contact the Student Assessment Services Unit at 781-338-3625 or [mcas@doe.mass.edu](mailto:mcas@doe.mass.edu). For questions regarding the **identification and initial assessment of LEP students**, please call the Office of Language Acquisition at (781) 338-3535.

Resources to support educators, parents, and others who work with LEP students are available on the Department's Web site at [www.doe.mass.edu/ell](http://www.doe.mass.edu/ell). The following is a brief synopsis of the information contained on each section of the Web site:

- Information on identifying new LEP students at [http://www.doe.mass.edu/ell/sei/identify\\_lep.html](http://www.doe.mass.edu/ell/sei/identify_lep.html)
- Information on resources related to English language learners at <http://www.doe.mass.edu/ell/curriculum.html?section=resources>
- Information on professional development at <http://www.doe.mass.edu/ell/profdev/>
- Information on guidance and laws at [www.doe.mass.edu/ell/guidance\\_laws.html](http://www.doe.mass.edu/ell/guidance_laws.html)
- Information on MEPA test administration, sample student work, scoring guides and reports of results at <http://www.doe.mass.edu/mcas/mepa/>
- *English Language Proficiency Benchmarks and Outcomes for English Language Learners*, which defines the benchmarks and outcomes that will annually be assessed on MEPA, at [www.doe.mass.edu/ell/benchmark.pdf](http://www.doe.mass.edu/ell/benchmark.pdf)
- *Requirements for the Participation of Students with Disabilities in MCAS* (Spring 2008 Update), which provides guidelines for the participation of students with disabilities in statewide tests and includes a list of commonly used test accommodations, at [www.doe.mass.edu/mcas/participation](http://www.doe.mass.edu/mcas/participation).



## **Preliminary Report on Current Fiscal Conditions in Massachusetts School Districts**

January 2008

Office of Strategic Planning, Research, and Evaluation  
Office of School Finance

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January 2008

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# Preliminary Report on Current Fiscal Conditions in Massachusetts School Districts

Massachusetts Department of Education  
Office of Strategic Planning, Research, and Evaluation  
Office of School Finance

January 2008

## **Summary and key findings**

Over the past decade and a half, the Commonwealth has moved steadily to increase expectations on school districts, schools, teachers, and students to meet the demands of a global economy. It has also added fiscal resources to support reaching these expectations, increasing state aid for education by almost 11 percent per year throughout the 1990s. Recent fiscal challenges at the state level, however, coupled by rising fixed costs and shifting enrollment patterns for districts, have combined to create substantial challenges for districts in sustaining the momentum of education reform. This initial investigation found that:

- **Academic expectations and challenges have risen, but spending on instructional services has not kept pace.** From fiscal years 2002 to 2007, total spending by districts and spending per pupil have remained flat relative to inflation. At the same time, the academic expectations for districts, schools, educators, and students have appropriately increased, and the demographic characteristics of the state's students have changed. Spending on instructional services is being crowded out by increases in other budget areas such as health insurance and out-of-district student placements. As a result, instructional services are declining as a share of total spending.
- **On average, districts spend 18 percent more than their foundation budget,** and nearly every district in the state is spending over foundation. This suggests that the current foundation budget formula may not reflect the cost of providing an adequate education to all students. Health insurance, payments to other districts, and teacher salaries were areas of particular concern; actual expenditures in these areas substantially outpaced the assumptions behind the foundation budget.
- **Chapter 70 aid increases did not keep up with inflation between 2003 and 2006.** From fiscal year 2003 to fiscal year 2006, most districts saw little or no increase in their aid, and many districts experienced cuts in fiscal year 2004. With the adoption of changes to the Chapter 70 formula in fiscal year 2007, aid has increased by more than 6 percent in each of the last two years. But after adjusting for inflation, state aid has only recovered to fiscal year 1999 levels, well below the high-water mark of fiscal year 2002.
- **Despite the Chapter 70 aid cutbacks, many districts were able to maintain their overall spending levels, but only by increasing local funding,** and, to a much lesser degree, imposing user fees for transportation and extracurricular activities. Although

these actions helped protect school budgets, they created added pressure on municipal budgets and on parents and community members.

- **A number of districts have experienced enrollment declines, which can have both a positive and negative fiscal impact.** Declining enrollment should make it easier to maintain services when budgets are tight, but in extreme cases it may also require school consolidations and teacher layoffs. Declines have been especially common in districts that serve large percentages of low-income students.
- **Districts have employed a variety of strategies to maintain services for students despite constraints in their instructional budgets.** In some cases, staff reductions have compensated for higher-than-average salary increases. In other cases, lower-than-average salary increases have helped maintain staffing levels but leave the district at risk of not being able to attract qualified new teachers. Statewide, average salaries have grown more slowly than inflation but more quickly than assumed by the foundation budget, and student-teacher ratios have edged up slightly during the period.

In summary, at a time when districts need to be moving forward quickly to address their students' growing educational needs, they are hard-pressed to maintain their expenditure levels, let alone increase them to meet higher expectations. And unlike the situation in the late 1980s, when school budget cuts were disproportionately affecting the poorer urban districts, today's fiscal pressures appear to be affecting a much broader range of districts, including many middle-class communities that have traditionally taken great pride in the quality of their school systems.

The current statewide foundation budget is \$8.4 billion. Some short-run increase in this funding level is likely necessary to address the rising cost of education in the Commonwealth. Beyond that, the Board of Education may wish to recommend a detailed study to update the foundation budget formula to ensure that it provides an adequate level of fiscal resources for both current and future needs. While the state continues to work toward a sustainable long-range funding plan, it will need to continue other initiatives to ensure that it is making the best use of its existing resources. Examples include:

- Creating incentives for local participation in the state health insurance and pension fund programs, to help bring the cost of these programs under control.
- Expanding the use of educational collaboratives and other regional entities to more efficiently provide services such as special education transportation, professional development, and specialized education programs.
- Helping districts to identify and adopt instructional practices and models that have been proven effective at improving student outcomes at a reasonable cost.
- Addressing the inefficiencies and lack of capacity created by the large number of small school districts in the state. Currently, 284 of the state's 328 operating districts serve fewer than 5,000 students.

Bringing all these resources to bear will allow districts to provide an adequate education to every child and allow the state to reach the vision and promise of education reform.

# **Preliminary Report on Current Fiscal Conditions in Massachusetts School Districts**

Massachusetts Department of Education  
Office of Strategic Planning, Research, and Evaluation  
Office of School Finance

January 2008

## **Introduction**

During the past several months, the Board of Education has begun a discussion on the fiscal conditions facing Massachusetts public school districts. The Board has heard considerable anecdotal evidence that a number of districts are facing financial difficulties that may be compromising their ability to provide quality educational services. At the Board's direction, the Department has conducted an initial investigation into district fiscal conditions in order to further this discussion and identify areas for possible Board action.

### **Increasing expectations, increasing challenges**

Massachusetts was one of the first states to establish the concept of a foundation budget: the minimum amount of funding needed by each local district to provide an adequate education. The foundation budget formula was first enacted in the Education Reform Act of 1993, and since then it has been used annually to calculate state aid allotments and minimum local funding levels. Other than some minor enhancements, as well as annual adjustments for inflation and enrollment changes, the foundation budget formula has essentially remained unchanged since its enactment.

Over the past decade and a half, the Commonwealth has moved steadily to increase expectations for school districts, schools, teachers, and students to meet the demands of a global economy. In 1993, the state had not yet articulated the standards it expected students to attain, nor had it developed the assessments the state would use to determine whether students had met those standards or the programs and supports that would help all students to achieve those standards.

Today, the Commonwealth has a fully articulated set of standards for all core subjects, including English language arts, mathematics, science and technology/engineering, history and social science, foreign languages, health, and the arts. Since the graduating class of 2003, students have been required to pass the grade 10 mathematics and English language arts MCAS tests in order to graduate from high school, with requirements for passing high school science and social science assessments soon to follow. In addition, students in the classes of 2010 and beyond who achieve only a Needs Improvement level on the grade 10 MCAS English language arts and mathematics tests will be required to complete an Educational Proficiency Plan in order to meet the state's high school graduation standard.

The state provides significant financial and programmatic support to help students attain these standards, and the state's students perform relatively well by many measures. Yet while 87 percent of the state's tenth graders passed both sections of the grade 10 MCAS test on the first try in spring 2007, only about 70 percent score Proficient or higher on either assessment—and proficiency on these grade 10 tests is increasingly viewed as an indicator that students are on a path to be college- and career-ready by the time they graduate. Moreover, more than one-third of the state's public high school graduates who enroll in public higher education in Massachusetts must take at least one remedial course in college, indicating that they are not yet ready for college-credit-bearing coursework despite having completed all the state and local requirements for high school graduation

Local educators are working hard to bring all their students to proficiency and beyond, but this is essentially a new job, and one that is proving to be tremendously challenging. Teachers today are educating a different set of students with different and greater needs than they were a decade ago. Total enrollment has declined slightly since its peak in 2003, but the number of students who require increased educational services (such as English language learners, those eligible for free or reduced-price lunch, and special education students) has risen dramatically relative to the total. Teachers must use a broader set of educational tools to reach these students and bring them all to proficiency—tools which they may not be trained or prepared to use. At the same time, state support for the professional development that would help teachers make this transition has stagnated, and the requirement that districts spend at least \$150 per pupil on professional development each year was eliminated as a result of the most recent budget crisis.

Schools and districts, too, are finding it difficult to reach the state's ambitious goals for education. Every year more schools and districts are identified as “in status”—that is, as not making sufficient progress in improving the performance of their students, either as a whole or for certain student subgroups. Statewide, 38 percent of the state's schools and 20 percent of its districts are in status for at least one subgroup, and the number will continue to increase as the federally required target of “all students proficient by 2014” looms ever closer.

### **Impact on districts**

For the first nine years of education reform, large increases in Chapter 70 aid, averaging almost 11 percent per year, allowed most districts to maintain and increase their educational services. Cities and towns also committed more resources to schools in order to meet the state's school spending requirements for localities. The current period of fiscal distress began in fiscal year 2003, when the economic recession of the early 2000s resulted in significant stresses on state and district fiscal conditions. Over the past six years, district fiscal conditions have worsened. Our initial investigation has found that:

- **Academic expectations and challenges have risen, but spending on instructional services has not kept pace.** From fiscal years 2002 to 2007, total spending by districts and spending per pupil have remained flat relative to inflation. At the same time, academic expectations for districts, schools, educators, and students have appropriately increased, and the demographic characteristics of the state's students have changed. Further, spending on instructional services—those services most directly related to

educating students—has increased at only half the rate of inflation, and even more slowly in districts that serve large shares of low-income students. Spending on instructional services is being crowded out by substantial increases in other budget areas such as health insurance and out-of-district student placements. As a result, spending on instructional services is declining as a share of total spending.

- **On average, districts spend 18 percent more than their foundation budget**, and nearly every district in the state is spending over foundation. This suggests that the current foundation budget formula may not reflect the cost of providing an adequate education to all students. Three areas were particularly concerning:
  - **Health insurance expenditures have far outpaced the foundation budget assumptions.** On average health insurance spending grew by 74 percent between 2002 and 2007; 84 districts saw their costs more than double. This increase reflects national trends in health care costs.
  - **Payments to other districts have also increased substantially.** A primary reason is rapid growth in special education costs, particularly for out-of-district students.
  - **The teacher salary assumptions in the foundation budget have historically underestimated actual statewide average salaries.** This gap has grown in recent years, even though teacher average salaries are actually increasing more slowly than inflation.
- **Chapter 70 aid increases did not keep up with inflation between 2003 and 2006.** From fiscal year 2003 to fiscal year 2006, most districts saw little or no increase in their aid, and many districts experienced cuts in fiscal year 2004. With the adoption of changes to the Chapter 70 formula in fiscal year 2007, aid has increased by more than 6 percent in each of the last two years. But after adjusting for inflation, state aid has still only recovered to fiscal year 1999 levels, well below the high-water mark of fiscal year 2002.
- **Despite the Chapter 70 aid cutbacks, many districts were able to maintain their overall spending levels, but only by increasing local funding**, and, to a much lesser degree, imposing user fees for transportation and extracurricular activities. Although these actions helped protect school budgets, they created added pressure on municipal budgets and on parents and community members.
- **A number of districts have experienced enrollment declines, which can have both a positive and negative fiscal impact.** Declining enrollment should make it easier to maintain services when budgets are tight, but in extreme cases it may also require school consolidations and teacher layoffs. Declines have been especially common in districts that serve large shares of low-income students.
- **Districts have employed a variety of strategies to maintain services for students despite constraints in their instructional budgets.** In some cases, staff reductions have compensated for higher-than-average salary increases. In other cases, lower-than-average salary increases have helped maintain staffing levels but leave the district at risk of not being able to attract qualified new teachers. Statewide, average salaries have grown more

slowly than inflation but more quickly than assumed by the foundation budget, and student-teacher ratios have edged up slightly during the period.

In summary, it is clear that many districts have lost ground with respect to instructional spending over the past six years, while others have struggled to maintain their existing levels of services. And few districts have had the resources to expand their instructional offerings to keep pace with the rising demands of education reform. Unlike the situation in the late 1980s, when school budget cuts were disproportionately affecting the poorer urban districts, today's fiscal pressures appear to be affecting a much broader range of districts, including many middle-class communities that have traditionally taken great pride in the quality of their school systems.

## **Recommendations**

The current statewide foundation budget is \$8.40 billion. Some short-run increase in this funding level is likely necessary to address the rising cost of education in the Commonwealth. Beyond that, the Board of Education may wish to recommend a detailed study to update the foundation budget formula to ensure that it provides an adequate level of fiscal resources for both current and future needs. As noted earlier, no such review has occurred since the foundation budget was first established in 1993. This study, in turn, will help inform the Board's future budget requests for Chapter 70 state aid and other district funding programs.

While the state continues to work toward a sustainable long-range funding plan, it will need to continue other initiatives to ensure that it is making the best use of its existing resources.

Examples include:

- Creating incentives for local participation in the state health insurance and pension fund programs, to help bring the cost of these programs under control.
- Expanding the use of educational collaboratives and other regional entities to more efficiently provide services such as special education transportation, professional development, and specialized education programs.
- Helping districts to identify and adopt instructional practices and models that have been proven effective at improving student outcomes at a reasonable cost.
- Addressing the inefficiencies and lack of capacity created by the large number of small school districts in the state. Currently, 284 of the state's 328 operating districts<sup>1</sup> serve fewer than 5,000 students.

The remainder of this report analyzes district financial conditions in more detail, identifying which factors are likely to have contributed most substantially to the fiscal conditions faced by many districts today. It provides supporting detail on school district spending and other fiscal trends during this period of time based on the end-of-year pupil and financial data submitted by each district to the Department. In addition to the summary tables included in this report, more detailed data used in this analysis is available on the Department's website at

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<sup>1</sup> An operating district is a municipal or regional school district or vocational or agricultural school. Charter schools are not included.

<http://www.doe.mass.edu/research/reports/research.html>. These data will help inform the Board's continuing discussions on whether districts have adequate fiscal resources to meet their current and future needs.

### **A comparison to the early 1990s**

Today's fiscal situation for districts is best understood in relation to the last major fiscal crisis for school districts, in the early 1990s. At that time, the problems facing Massachusetts school districts were clearer. The state had not defined what constituted an adequate education, and state and local officials were not required to ensure that districts met annual spending goals. As a result, wealthier school districts were spending substantially more on their students than the districts that served our most disadvantaged students. Further compounding this situation was the economic recession that the Commonwealth experienced in the early 1990s, which severely limited the amount of aid available from the state to supplement local resources.

The Board and Department of Education played important roles in documenting these conditions in two influential reports that were published in the fall of 1991 entitled "Report on the Condition of the Public Schools in Holyoke, Lawrence, Brockton, and Chelsea" and "A Policy Position on Distressed School Systems and School Reform."

This situation led the Supreme Judicial Court to rule in the *McDuffy* case that the Commonwealth was not meeting its constitutional obligation to provide an adequate level of education to its students. The Education Reform Act of 1993, which included substantial changes to how the Commonwealth funds public education, was signed into law a few days after the *McDuffy* decision.

The Act required the legislature to define a foundation budget for each district: the amount of money necessary to provide an adequate education to all students in that district, based on district enrollment patterns and other factors. Forty percent of school districts were already spending at or above the foundation budget level, but many urban and rural districts were spending at levels far below it. The act also established annual spending requirements for cities and towns to make on behalf of their schools. For districts spending below foundation, the state committed to increasing state aid to make up the difference between required local spending and the foundation budget amount. Districts that were already spending at or above their foundation budgets were guaranteed minimum aid increases each year.

Today all districts are spending at or above foundation and the correlation between property wealth and per-pupil spending is far weaker. Since the implementation of the Education Reform Act, overall spending has increased and it has increased the fastest in districts that serve the highest numbers of low-income students, as Table 1 demonstrates.<sup>2</sup>

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<sup>2</sup> Districts in the lowest quartile have low-income populations between 0 and 6.1 percent; second quartile, between 6.2 and 12.7 percent; third quartile, between 12.8 and 24.7 percent; highest quartile, 24.8 percent or greater. The state average is 28.9 percent. These data are calculated from the 2006–2007 school year special populations report published by the Department of Education.

**Table 1: Actual net school spending per pupil by enrollment of low-income students (quartiles), 1993 and 2007**

Actual Net School Spending Per Pupil	FY93	FY07	Percent Change
Lowest quartile (smallest share of low-income students)	\$5,640	\$9,622	70.6%
Second quartile	\$5,257	\$9,402	78.9%
Third quartile	\$5,234	\$10,003	91.1%
Highest quartile (largest share of low-income students)	\$5,250	\$10,388	97.9%

FY07 includes data on 293 of 328 operating districts.

In a recent test of the progress that the Commonwealth has made since *McDuffy*, the Supreme Judicial Court ruled in the *Hancock* case that the Commonwealth was meeting its constitutional obligations relative to public education. Citing the billions of dollars invested and the establishment of curriculum and accountability standards since *McDuffy*, the court denied further relief and terminated ongoing oversight. Yet there have been only minor adjustments to the assumptions that underlie the foundation budget since they were established in the mid 1990s. Fifteen years later, how closely do they track actual spending?

**The foundation budget is not keeping pace with actual spending in some key expenditure categories**

The foundation budget is derived from a series of assumptions about the school staffing, salaries, and non-instructional costs necessary to provide an adequate education to students. These assumptions are reflected in a set of per-pupil rates, adjusted for inflation each year. Higher rates are assigned to students whose resource needs are assumed to be greater, such as vocational students, English language learners, and low-income students. District foundation budgets are calculated by applying these rates to the student demographic profile of the district. Since fiscal year 2000, all districts have been funded at least at foundation budget levels through a combination of local contributions and Chapter 70 aid.

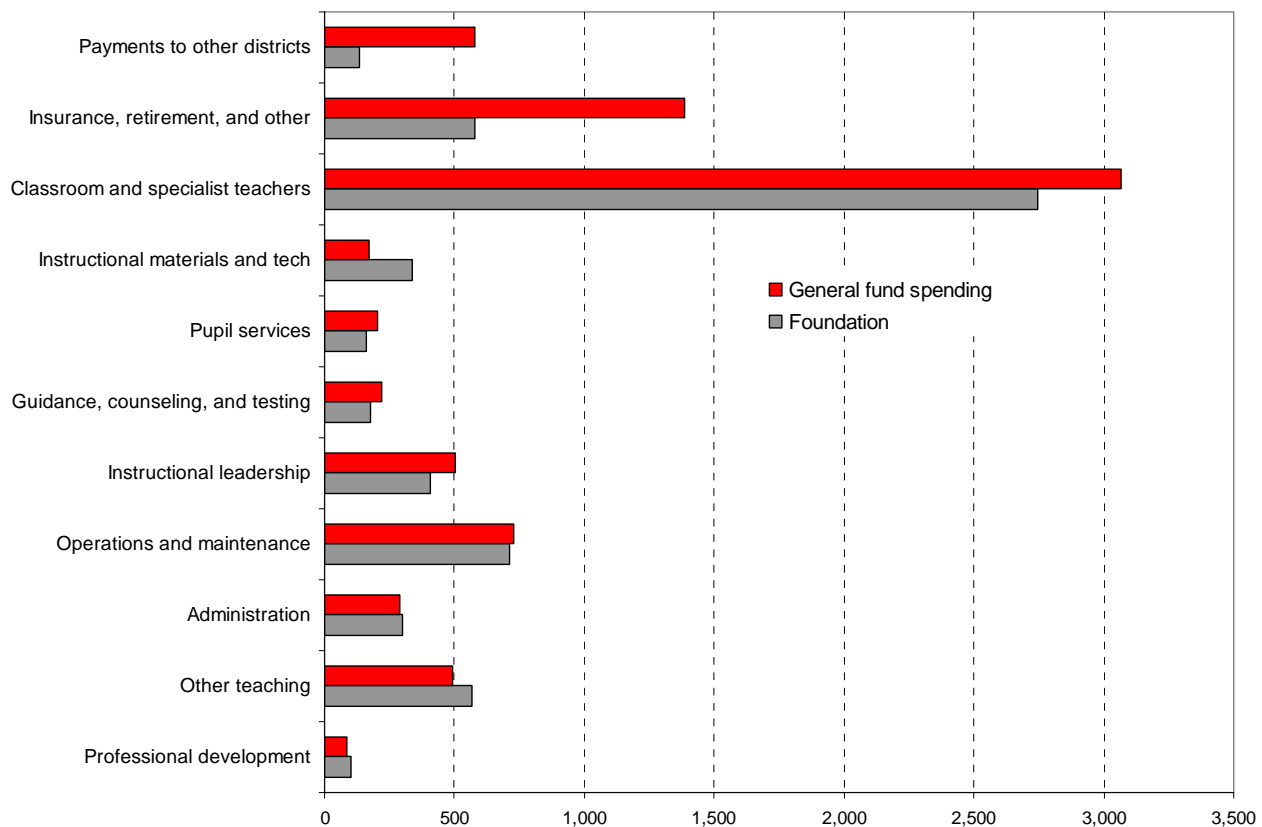
The metric that the Department has traditionally used to track district expenditures against the foundation budget is net school spending (NSS) as a percent of the foundation budget. Using available data, by this measure the average district in the Commonwealth spent 18 percent more than foundation in fiscal year 2007, suggesting that the foundation budget assumptions may not be keeping pace with actual spending. So far, 117 districts spent 25 percent or more above foundation, and 64 districts spent 40 percent or more above foundation.

Breaking the foundation budget out by spending categories reveals the areas where the assumptions are most out of alignment with actual spending. Recent changes in the spending

categories mean that this analysis can only be performed for fiscal year 2007, and only for the 265 operating districts that had reported their fiscal year expenditures by category at the time this analysis was performed.<sup>3</sup>

Figure 1 shows that spending in many categories tracks fairly closely with the foundation budget assumptions, but in at least four functional categories, actual general fund spending is substantially different. The categories with the largest disparities are insurance and retirement, payments to other districts, teacher salaries, and instructional equipment and materials.

Figure 1: Actual general fund spending compared to foundation budget, FY07 (millions of dollars)



Data presented for 265 of 328 operating districts.

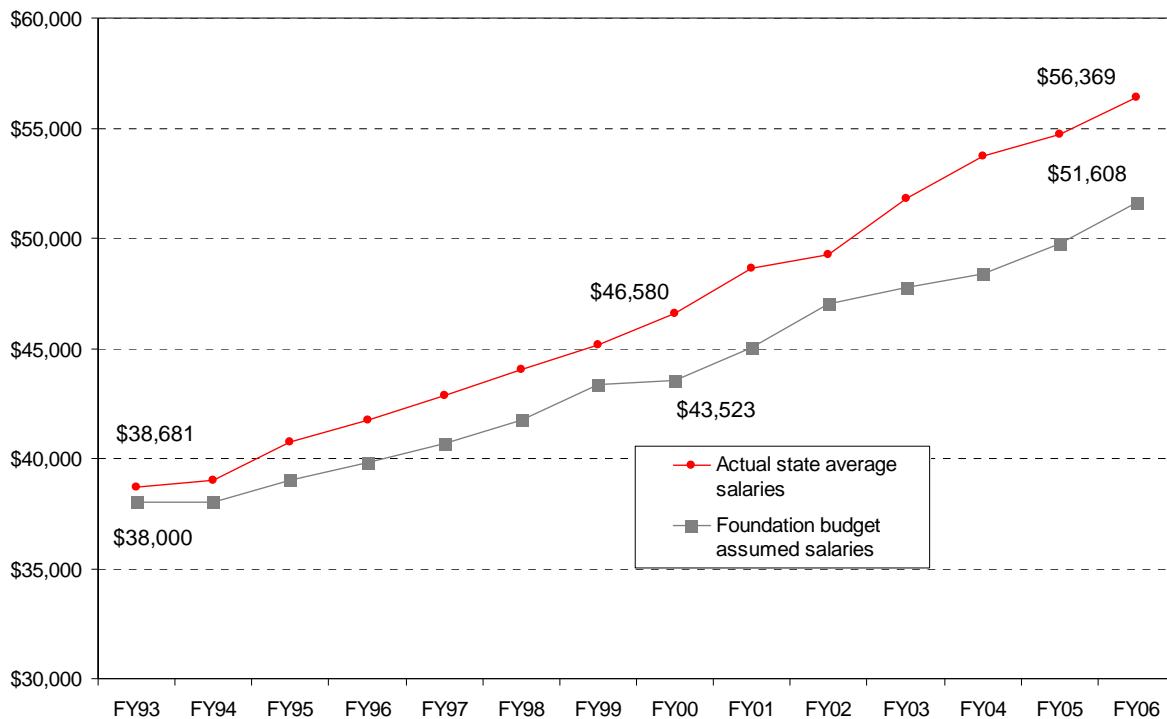
Among the districts with data available for this analysis for fiscal year 2007, spending in the insurance and retirement category exceeded foundation by 239 percent: \$1.39 billion in actual spending versus \$579 million assumed in the foundation budget. Costs in this category have grown much faster than inflation in recent years, and districts have had a difficult time managing this growth.

<sup>3</sup> Prior to fiscal year 2007, the foundation budget assumptions were broken down into 18 functional categories, many of which did not conform to the accounting categories that districts are required to use when they report their expenditures. A major change to the foundation budget occurred in fiscal year 2007 when the 18 categories were consolidated into 11, all of which conform directly to the Department’s chart of accounts. For more information about the foundation budget go to: [http://finance1.doe.mass.edu/chapter70/chapter\\_cal\\_cat.html](http://finance1.doe.mass.edu/chapter70/chapter_cal_cat.html).

Payments to other districts are also outpacing foundation budget assumptions: \$580 million spent versus \$136 million assumed, a 425 percent difference. But here the picture is more complicated. When the foundation budget was first constructed, this category was intended to cover the cost of special education out-placement tuitions and did not anticipate the growth that has occurred in the school choice program or the advent of charter schools. Out of the \$580 million in actual general fund expenditures, 60 percent went to special education tuition payments. These expenditures totaled \$349 million, or 257 percent of the foundation assumption.<sup>4</sup>

The remaining \$231 million was comprised of tuitions for regular education and vocational students, most of which went to charter schools and school choice districts. Pupils attending charter schools and choice districts are included in the other ten functional categories when the foundation budget is calculated, but the actual tuition expenditures for these students shows up under payments to other districts. It is proper to report these tuitions in the payments to other districts function, but not to compare these expenditures to the assumptions about special education tuition.

Figure 2: Actual average teacher salaries compared to foundation budget assumed salaries, FY93 to FY06



<sup>4</sup> Special education enrollment, both for in-district and out-of-district students, is an assumed rather than an actual enrollment number to eliminate the incentive to over-classify students into special education. The assumed enrollment percentage is 3.75 percent for in-district enrollment and 1 percent for out-of-district enrollment. This assumed number is then multiplied by an estimated cost—\$20,822 for in-district students and \$21,750 for out-of-district students in fiscal year 2007—to arrive at the foundation budget allotment for special education students.

Actual spending also exceeded foundation budget assumptions in the teacher salaries category, which totaled \$3.07 billion, 11 percent higher than the \$2.75 billion foundation allotment. While the gap is not as pronounced as many of the other categories in percentage terms, the \$319 million dollar difference is substantial. The difference is at least in part attributable to the fact that the average teacher salary assumption in the fiscal year 2007 foundation budget was \$55,794, while the actual average for these districts was \$58,253. Figure 2 shows that the salary assumptions in the foundation budget have historically tracked below actual statewide averages by between 2 percent (fiscal year 1993) and 11 percent (fiscal year 2004).

Spending on instructional materials and equipment (such as textbooks and computers) shows a disparity in the opposite direction. The foundation budget was \$339 million for the 256 districts with available fiscal year 2007 data, but these districts actually spent only \$170 million from general funds on this category—about half the amount assumed in the foundation budget. The last five years have seen an 8 percent drop in nominal spending in this category, from \$350 million statewide in fiscal year 2002 to \$321 million in fiscal year 2006. Some of this spending (\$96 million for the 256 reporting districts) appears to be made up for with grants and other financial resources not included in this analysis. Yet even with the addition of these funds, districts are still spending 27 percent below the foundation budget assumption for this category.

### **Three factors: health insurance, special education, and changing demographics**

The analysis so far shows that the assumptions of the foundation budget are not always aligned with actual district expenditures. This section delves more deeply into three of the most important reasons for this misalignment: growing health insurance costs, growing special education costs, and changing student demographics. It also explores how expenditure patterns vary by the representation of low-income students in districts and what the state has done so far to address these problems.

For this analysis we rely on annual end of year report data, which includes expenditures by districts from all sources: general fund, state and federal grants, and other funds. These data are available for fiscal year 2007 for 317 out of the 328 operating school districts in the state. This differs slightly from the analysis of the foundation budget assumptions versus actual expenditures, which looked only at general fund expenditures and were available for 265 of 328 operating districts for fiscal year 2007.

#### **Health insurance**

The previous analysis showed that districts on average are spending three times more on health insurance than the foundation budget assumes. These increases reflect a national trend of skyrocketing health insurance costs. For districts with available data, on average health insurance spending grew by 74.3 percent between 2002 and 2007; 84 districts saw their costs more than double. Even districts whose health insurance spending has grown at less than average rates have experienced phenomenal growth in this category: only 60 districts saw their health insurance spending grow by less than 50 percent.

These costs are consuming an ever-larger share of district spending. Looking at districts with available data for fiscal year 2007, the share of total operating expenditures going to health insurance grew from 8.3 percent to 11.7 percent between 2002 and 2007. While this seems like a small change in percentage terms, if the share of spending had simply remained constant, these districts would have spent \$388 million less to fund their health insurance programs in fiscal year 2007 than they actually did. This trend has a substantial impact on school districts' budgetary decision-making.

**Table 2: Health insurance spending by enrollment of low-income students (quartiles), 2002 and 2007**

Health insurance spending (millions)	FY02	FY07	Percent change	Percent of total operating expenditures	
				FY02	FY07
Lowest quartile (smallest share of low-income students)	\$114.9	\$221.1	92.3%	7.2%	10.5%
Second quartile	\$135.9	\$248.1	82.6%	8.0%	11.4%
Third quartile	\$118.6	\$221.7	87.0%	8.4%	12.6%
Highest quartile (highest share of low-income students)	\$403.0	\$655.7	62.7%	8.8%	11.9%
<b>State totals</b>	<b>\$772.4</b>	<b>\$1,346.6</b>	<b>74.3%</b>	<b>8.3%</b>	<b>11.7%</b>

Includes data from 317 out of 328 operating school districts.

Interestingly, the districts experiencing the highest rates of growth in health insurance costs are those that serve the fewest low-income students as a percent of their total student populations. Health insurance spending is growing the slowest among districts that have the highest proportion of low-income students, possibly because these districts tend to be larger and therefore can get more advantageous rates. Another notable trend, however, is that those districts with higher percentages of low-income students also spend larger shares of their budgets on health insurance.

To address this concern, last summer the legislature enacted the portion of the governor's Municipal Partnership Act that allows cities, towns, and regional school districts to purchase their health insurance from the Group Insurance Commission, which oversees health care plans for state employees. Historically, the GIC's large enrollment pool has allowed it to be much more successful than cities and towns at controlling growing health insurance costs. Between fiscal years 2001 and 2006, the GIC's costs grew by 48 percent, much lower than the increase for the average school district in the Commonwealth.<sup>5</sup>

<sup>5</sup> Massachusetts Department of Revenue, Division of Local Services, Municipal Data Bank.

The estimated cost savings associated with this change are significant and could free up additional resources to support programs and services that directly benefit students.<sup>6</sup> However, the requirement that local governments gain the approval of 70 percent of their collective bargaining units to take advantage of the new law has meant that few municipalities have been able to quickly adopt this change. Saugus received a special exemption to begin participating in GIC on January 1, 2008. Four other towns and three regional school districts have secured the necessary approvals to enroll in GIC in fiscal year 2009. Time will tell how many will pursue this option, what kinds of cost savings they will realize, and how these savings will be used to benefit schools.

## **Special education**

Special education costs are another area of misalignment between foundation budget assumptions and actual expenditures. Federal law entitles all students with disabilities to receive a free and appropriate public education in the least restrictive environment. Shouldering the cost of providing these services has proven a challenge, particularly in smaller districts where just a few special-needs children can represent a large share of total district expenditures and where expenditures can be unpredictable from year to year.

Based on the most current available expenditure data for this category, between 2002 and 2006 spending on special education grew from \$1.37 billion to \$1.75 billion, representing nearly 20 percent of total district expenditures. Within this category, out-of-district tuition appears to be creating the greatest burden. Districts typically incur out-of-district costs for their highest-need students, such as those that attend special schools for students with severe disabilities. Out-of-district tuition costs grew by 39.0 percent between 2002 and 2006, as compared to 23.3 percent for in-district expenditures.

With larger increases in out-of-district expenditures, districts that serve fewer low-income students (the lowest and second quartiles) saw their total special education expenditures grow by more than 30 percent. Districts in the third and highest quartiles saw their total special education expenditures grow at much slower rates, but also saw their out-of-district costs grow faster than in-district costs.

The legislature has acted in recent years to address this growing problem. In fiscal year 2004, the state implemented the Special Education Circuit Breaker program to help districts offset the cost of educating high-need special education students enrolled in both in-district and out-of-district programs. If the cost of educating these students exceeds a certain threshold—\$31,616 in fiscal year 2006—districts can be reimbursed for up to 75 percent of the cost above this amount, depending on the availability of funds. Since its inception, the Circuit Breaker program has grown substantially: from \$94 million in fiscal year 2004 to close to \$200 million in fiscal year 2007. Statewide, the Circuit Breaker is now reimbursing districts for roughly 10 percent of the total cost of educating special-needs children, on top of the 36 percent of special education expenditures that are offset by Chapter 70 aid.<sup>7,8</sup>

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<sup>6</sup> “Municipal Health Reform: Seizing the Moment.” <http://www.bmrb.org/content/upload/BMRBMTF.pdf>

<sup>7</sup> This is calculated as the share of actual net school spending on special education that was paid for through Chapter 70 aid in fiscal year 2006.

**Table 3: Special education expenditures by enrollment of low-income students (quartiles), 2002 and 2006**

Special Education	Percent change in special education expenditures, FY02 to FY06			Special education expenditures as a share of total spending (excluding grants)		
	In-district	Out-of-district	Total	FY02	FY06	Percentage point change
Lowest quartile (smallest share of low-income students)	31.4%	51.2%	38.0%	17.4%	19.4%	2.0%
Second quartile	27.2%	47.7%	33.5%	17.1%	19.0%	1.9%
Third quartile	18.4%	36.9%	24.1%	16.4%	17.9%	1.4%
Highest quartile (highest share of low-income students)	20.1%	30.7%	23.2%	17.9%	19.5%	1.6%
<b>State totals</b>	<b>23.3%</b>	<b>39.0%</b>	<b>28.1%</b>	<b>17.4%</b>	<b>19.1%</b>	<b>1.7%</b>

Includes data from 328 out of 328 operating school districts

An additional concern for districts is the high cost of transporting some special education students, which in some cases can be more expensive than the cost of their education program. Among districts with available fiscal year 2007 data, special education transportation costs increased by 40 percent between fiscal years 2002 and 2007, from \$150 million to \$208 million. The state does not currently reimburse districts for these costs, but the Department is funding a pilot program with three collaborative special education schools around the state to promote cooperative purchasing of these services. The Department will be evaluating the impact of this program in 2008 to determine whether it should be expanded to more districts and collaboratives.

### **Demographic trends**

An additional educational and fiscal challenge driving the misalignment of foundation budget assumptions to actual expenditures is the impact of demographic change. Declining enrollments and a shifting distribution of student characteristics have interacted in recent years to increase the cost of educating the Commonwealth's children.

After a number of consecutive years of enrollment growth in the 1990s and early 2000s, demographic changes are now causing the school age population to trend slightly downward across the state. Right now this trend is most noticeable among the regional school districts in the western part of the Commonwealth, but districts across the state are seeing enrollment declines, and this trend is projected to continue in the years ahead.

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<sup>8</sup> Special education expenditure data for individual school districts is available at [http://finance1.doe.mass.edu/SchFin/sped/sped\\_exp\\_budget.aspx](http://finance1.doe.mass.edu/SchFin/sped/sped_exp_budget.aspx).

**Table 4: Enrollment (FTEs) by enrollment of low-income students (quartiles), 2002 and 2007**

Enrollment (FTEs)	FY02	FY07	Percent change
Lowest quartile (smallest share of low-income students)	180,817.6	187,418.5	3.7%
Second quartile	194,673.0	196,298.7	0.8%
Third quartile	152,728.9	144,978.1	-5.1%
Highest quartile (highest share of low-income students)	417,164.2	388,043.0	-7.0%
<b>State totals</b>	<b>945,383.7</b>	<b>916,738.3</b>	<b>-3.0%</b>

Includes data from 317 out of 328 operating school districts

Table 4 shows that enrollment has fallen by 3 percent on average between fiscal years 2002 and 2007 for districts with available data. Enrollment declined at the fastest rate in districts that serve the highest percentages of low-income students, by 29,000 students (7 percent). Enrollment declined by nearly 8,000 students (5 percent) in third-quartile districts and increased by nearly 6,600 students (4 percent) in districts that serve the smallest share of low-income students.

Some districts may be able to deal with declining enrollment by consolidating services, closing buildings, and/or reducing staffing levels. Other districts, however may not be able to adjust to enrollment changes as easily. The amount of enrollment decline might not be sufficient to justify major organizational changes, or the community might not support the changes. The decision to close elementary schools in rural regional school districts, for example, is complicated by the impact that a closure can have on the fabric of a community as well as concern about maintaining reasonable travel times for younger students. The foundation budget calculations assume that districts are operating at an efficient scale and therefore apply the same per-pupil rates to all districts. But external factors that affect a district’s ability to adjust to declining enrollment might cause some districts to operate what would otherwise be considered inefficiently small elementary schools.

In addition to enrollment loss, some districts are also seeing changes in the demographic characteristics of their student populations. First, as the children of the Baby Boomers age, enrollment has shifted away from elementary schools and toward secondary institutions. As Table 5 demonstrates, high school students currently comprise 30.8 percent of total enrollment, up from 26.3 percent in 1997. Programmatic focus on early childhood has also upped the number of students enrolled in public pre-K programs, yielding a nearly 60 percent increase in enrollment in this category in just ten years. Further, the state has seen rapid growth among certain demographic subgroups, such as non-native English speakers (up by 26,000 since 1997); students with limited English proficiency (up by 10,000); and low-income students (up by 42,000).

Table 5: Enrollment by grade span and student status, 1997, 2002, and 2007

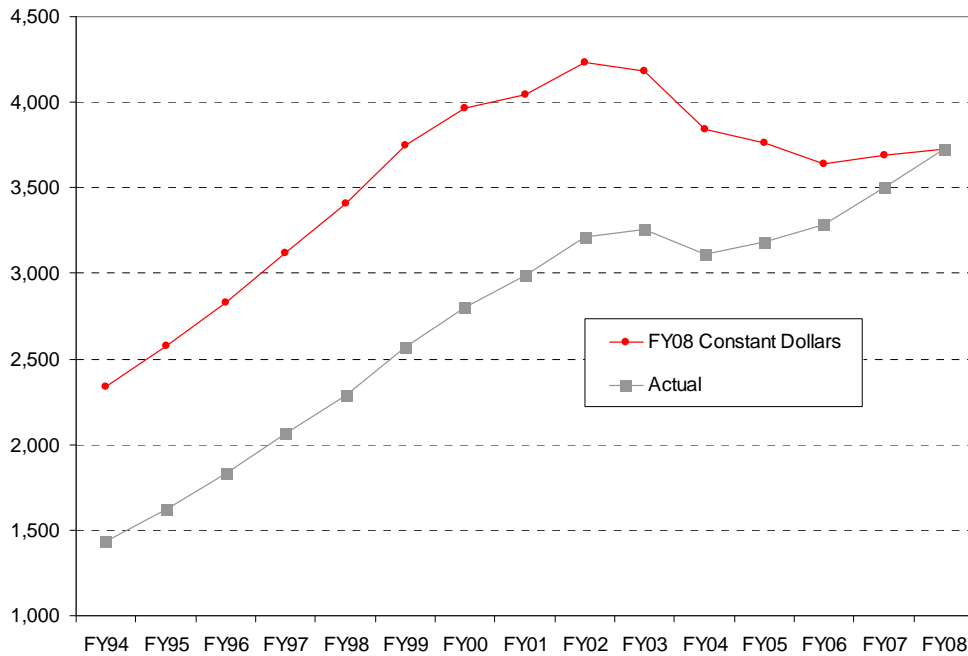
	1997		2002		2007		Percent change 1997-2007
	N	% of total	N	% of total	N	% of total	
Pre-school	15,695	1.7	20,865	2.1	24,875	2.1	58.5%
Kindergarten	76,546	8.2	68,576	7.0	68,585	7.0	-10.4%
Grades 1–5	380,549	40.7	378,109	38.8	355,510	38.8	-6.6%
Grades 6–8	208,664	22.3	232,230	23.8	221,094	23.8	6.0%
Grades 9–12	246,205	26.3	273,911	28.1	298,033	30.8	21.1%
Special education	155,029	16.6	150,003	15.4	163,369	16.9	5.4%
First language not English	118,375	12.7	128,218	13.2	143,952	14.9	21.6%
Limited English Proficiency	44,394	4.7	46,254	4.7	54,071	5.6	21.8%
Low-income	238,713	25.5	246,808	25.3	280,238	28.9	17.4%
<b>Total enrollment</b>	<b>935,623</b>	<b>n/a</b>	<b>974,015</b>	<b>n/a</b>	<b>968,661</b>	<b>n/a</b>	<b>3.5%</b>

As a result, the share of the student body comprised of students requiring additional educational services, such as high school students, English language learners, and low-income students, has increased substantially since the early years of education reform. Although the Chapter 70 budget accounts for these higher costs, increases in the foundation budget do not necessarily translate into more state aid to districts.

**Cuts in state aid mean school districts are relying more on local revenues to support their operating costs**

At the same time as costs have risen faster than the foundation budget assumes, cuts in state aid have prompted districts to rely more on local funds to support their operating budgets. When the stock market bubble burst in 2002, growth in state revenues declined substantially. For three successive fiscal years starting in 2003, new Chapter 70 funds were only provided to districts that needed additional support to guarantee that they would reach foundation. Districts who were already being funded at or above foundation were level-funded in fiscal year 2003 and actually saw their state aid reduced by as much as 20 percent in fiscal year 2004 when the revenue picture worsened. Statewide, Chapter 70 aid fell by 4.5 percent or \$150 million that year. Most districts were level-funded once again in fiscal year 2005.

Figure 3: Chapter 70 aid, actual versus inflation-adjusted (millions of FY08 dollars)



Despite the slow growth in Chapter 70 aid during the fiscal downturn, the formula remained progressive, providing relatively more resources to districts serving more low-income students. Table 6 shows that in per-pupil terms, districts serving the highest percentages of low-income students received the highest aid allocations and saw their per-pupil aid allocations to these districts increase at the fastest rates between 2002 and 2008.

Table 6: Chapter 70 aid per pupil by enrollment of low-income students (quartiles), 2002 and 2008

Chapter 70 Per Pupil	FY02	FY08	Percent Change
Lowest quartile (smallest share of low-income students)	1,736	1,965	13.2%
Second quartile	2,245	2,626	17.0%
Third quartile	2,904	3,385	16.6%
Highest quartile (highest share of low-income students)	4,687	5,671	21.0%
<b>State totals</b>	<b>3,350</b>	<b>3,922</b>	<b>17.1%</b>

Includes data for all operating school districts.

Nonetheless, after adjusting for inflation, the Chapter 70 aid allocation in fiscal year 2008 was approximately the same as the amount allocated in fiscal year 1999, well short of the peaks reached in the early 2000s. Moreover, of the 252 districts that saw their state aid reduced in fiscal year 2004, 75 are receiving less aid, in nominal terms, in fiscal year 2008 than they did before the fiscal downturn.

Recent changes implemented by the state legislature have begun to address this shortfall in state aid for education. Chapter 70 aid grew by 3.3 percent in fiscal year 2006, enough to ensure that all districts, not just those eligible for foundation aid, received some increase in funding. Funding increased further in fiscal year 2007 as the state began to phase in a sweeping set of changes to the funding formula. Starting in fiscal year 2007 the formula began using communities' current property values and residential income to determine the "ideal" mix of state and local funding for schools. This change increased state aid by 6.6 percent overall in fiscal year 2007, bringing the total appropriation to \$3.50 billion.

Districts that will benefit from this new approach are those that in the past were required to make higher contributions than their ability to pay, as measured by their income and property wealth. The required contributions for these districts will be brought down to the level defined by the formula over the next five years, and commensurately, their state aid will increase. Aid will increase at faster rates for districts with the largest disparities. In fiscal year 2008, 119 districts fell into this category. Other districts will still be eligible for aid increases to offset the effects of enrollment growth or will receive the minimum guaranteed increase.

Chapter 70 aid increased by another 6.2 percent, or \$220 million, in fiscal year 2008 as the changes to the formula continue to be implemented. At this rate of increase, Chapter 70 is expected to outpace overall state budget growth by 2 percent. Assuming the legislature continues to phase in the changes to the formula at or near the current pace, many districts will see funding increases in the next few years.<sup>9</sup>

Nonetheless, districts are still feeling the impact of the earlier Chapter 70 cuts in their operating budgets. In order to keep services level, municipalities have had no choice but to substantially increase their contributions to school budgets. Between fiscal years 2002 and 2006, the most current year for which this breakdown is available, total spending across all districts increased from \$9.3 billion to \$11.1 billion, an increase of 19 percent. As Table 7 demonstrates, while state and federal programs such as the Special Education Circuit Breaker and the additional funding associated with No Child Left Behind grew quickly during this period, in dollar terms they only supported one-quarter of the increase in spending. Three-quarters of the increase—\$1.3 billion—was supported by local funds.

Since local funds support the majority of district operating expenditures in most school districts in the first place, this is not in and of itself surprising. But this rate of increase combined with very slow growth in Chapter 70 funding and a decline in state grant line items caused the share of total spending generated from local sources to increase.

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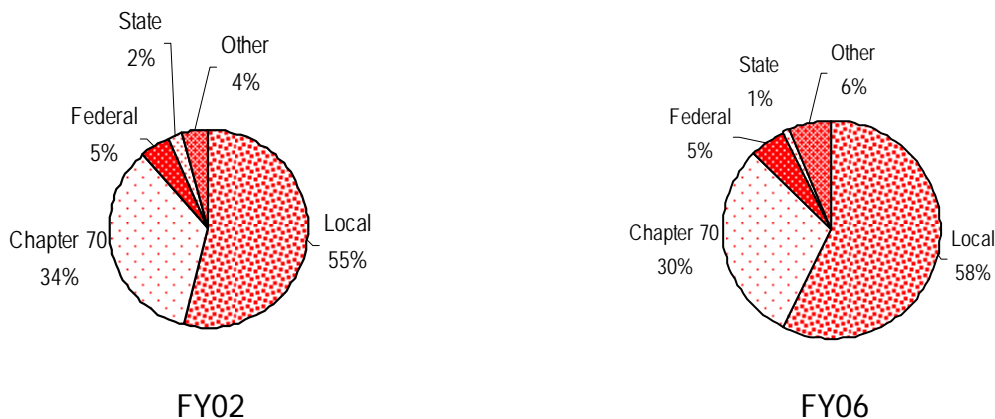
<sup>9</sup> For more information on how the foundation budget and Chapter 70 aid are calculated, go to [http://finance1.doe.mass.edu/chapter70/chapter\\_08.html](http://finance1.doe.mass.edu/chapter70/chapter_08.html).

Table 7: Total operating expenditures by source of funds, 2002 to 2006 (millions of dollars)

	Local funds	Chapter 70 aid	Federal grants	State grants	Other funds	Total
FY02	\$5,031	\$3,213	\$440	\$230	\$399	\$9,312
FY03	\$5,268	\$3,258	\$528	\$181	\$431	\$9,665
FY04	\$5,623	\$3,111	\$599	\$130	\$529	\$9,992
FY05	\$5,956	\$3,183	\$577	\$108	\$662	\$10,486
FY06	\$6,357	\$3,289	\$585	\$115	\$714	\$11,060
Dollar change	\$1,326	\$76	\$144	-\$114	\$316	\$1,748
Percent change	26.4%	2.4%	32.8%	-49.8%	79.2%	18.8%

Figure 4 shows that this shift amounted to 3 percentage points (55 percent to 58 percent) between fiscal years 2002 and 2006. Meanwhile, Chapter 70 aid as a share of total expenditures fell from 34 percent to 30 percent. The share of federal funding held steady, while state grant support fell by 1 percentage point. Funding from other sources consumed a larger share of the overall pie, due to the aforementioned increases in Circuit Breaker funding for special education students and, to a lesser degree, an increase in user fees to support services like transportation and athletics.

Figure 4: District operating expenditures, all funds by source, 2002 and 2006



Source: Massachusetts Department of Education

Note: Figure 4 includes other state revenues in the share of local spending that cannot be distinguished from local source revenues. These are mostly Lottery and Additional Assistance funds, which cities and towns can use to offset some of their educational spending in addition to other municipal expenses. If it could be calculated, the percentage accounted for by these funds would be relatively small, and it probably declined between fiscal years 2002 and 2006 when funding for both line items was reduced.

## **A note on fees**

Many districts institute fees in order to dampen the impact of declining revenues on other programs and services. Fees garner a great deal of public attention because of the burden they place on individual students. How important are they in shoring up district budgets?

Fees are most commonly imposed for transportation and extra-curricular activities, typically athletics. Though the state does not collect data on the total amount of revenues districts receive from fees, it does collect data on the amount of money districts *spend* from fee revenues.

By this measure, between fiscal years 2002 and 2006, district spending on transportation services funded by user fees increased from \$3 million to \$11 million; spending in this category appears to be increasing for fiscal year 2007 as well. The number of districts expending fee revenues to support transportation services—a proxy for the number of districts charging transportation fees—increased from 41 in fiscal year 2002 to 93 in fiscal year 2006. This increase may have been in response to the state’s elimination of the municipal transportation reimbursement line item, which was cut in 2004 during the budget crisis.

The number of districts spending athletic fee revenues has remained stable at just over 200 between fiscal years 2002 and 2006, and this number will likely remain unchanged in fiscal year 2007. Spending from athletic revolving funds, which is largely supported by user fees, increased from \$12 million to \$23 million between fiscal years 2002 and 2006, suggesting that districts are relying less on general fund revenues and more on fees to support these programs.

Districts and the state have taken steps to minimize the impact of fees on students. Most districts have reduced fee structures and waivers to accommodate the needs of low-income students, and districts may only charge transportation fees to students who are not eligible to receive free transportation. It’s important to remember, however, that the dollars that districts spend from fee revenues represent a very small share of district operating expenditures, generally well under 1 percent. They are probably more valuable as a means of gaining visibility for challenging district fiscal conditions than as a means of resolving them.

### **Worsening district fiscal conditions have begun to affect educational services**

The pressures these fiscal trends have put on school budgets have begun to affect districts’ ability to serve their students, particularly for districts that serve a large share of low-income students.

For the most part, districts have been able to maintain total spending in nominal terms, though spending is down somewhat after adjusting for inflation. Statewide total spending on education in fiscal year 2002 was \$9.29 billion; in fiscal year 2007, it was \$11.53 billion for districts with available data. At 24.1 percent, this increase slightly lagged the 25.3 percent inflation rate for state and local government services during this period. Similarly, per-pupil spending (available using a new methodology beginning in fiscal year 2005) increased at close to the rate of inflation, from \$10,560 per pupil in fiscal year 2005 to \$11,363 in fiscal year 2007.

The impact on instructional services, however, has been more visible. Instructional services is the programmatic core of education: the part of expenditures most directly tied to actually educating students. Most of the costs in this category support salaries for teachers and administrative staff such as principals, curriculum directors, paraprofessionals, librarians, medical and therapeutic staff, and guidance counselors and psychologists. Appropriately, these services are the single largest category of expenditures for districts, comprising 50 to 60 percent of most districts' budgets.

Statewide, instructional spending grew by \$720 million between fiscal years 2002 and 2007. This represents a 13 percent increase, only half the inflation rate over the same period. Further, instructional spending is losing ground to other categories as a share of total operating expenditures, falling from 61.0 percent to 55.4 percent. Instructional spending is clearly being squeezed by faster-than-anticipated growth in other spending categories, such as health insurance and special education.

Table 8: Instructional spending by enrollment of low-income students (quartiles), 2002 and 2007

Instructional Spending (millions)	FY02	FY07	Percent Change	Percent of Total Operating Expenditures	
				FY02	FY07
Lowest quartile (smallest share of low-income students)	\$996.5	\$1,206.5	21.1%	62.4%	57.5%
Second quartile	\$1,063.5	\$1,239.5	16.5%	62.4%	56.8%
Third quartile	\$853.6	\$958.5	12.3%	60.5%	54.6%
Highest quartile (highest share of low-income students)	\$2,753.9	\$2,983.3	8.3%	60.2%	54.3%
<b>State totals</b>	<b>\$5,667.6</b>	<b>\$6,387.9</b>	<b>12.7%</b>	<b>61.0%</b>	<b>55.4%</b>

Includes data from 317 out of 328 operating school districts

Even more worrisome, instructional spending is growing most slowly in districts that serve the largest share of low-income students. These districts saw instructional spending increase by only 8.3 percent over the six years, one-third the increase in districts with the smallest share of low-income students.

These declines in expenditures on instructional services are also reflected in staffing levels and salary trends. Table 9 shows that since 2002, staffing has declined by 3,700 teachers statewide for districts with available fiscal year 2007 financial data. Nearly one-third of this drop occurred during a single year, fiscal year 2004, at the height of the fiscal downturn. Districts reported nearly 1,400 fewer teachers in fiscal year 2004 than they did in fiscal year 2003. Further, most of the decline has occurred in districts that serve the highest proportion of low-income students.

**Table 9: Teacher staffing levels and average teacher salaries, 2002 and 2007**

	Teaching Staff (FTEs)			Average Teacher Salaries		
	FY02	FY07	Percent Change	FY02	FY07	Percent Change
Lowest quartile (smallest share of low-income students)	13,055	13,047	-0.1%	51,288	61,290	19.5%
Second quartile	14,276	14,247	-0.2%	50,079	57,917	15.7%
Third quartile	11,806	11,505	-2.5%	49,017	55,833	13.9%
Highest quartile (highest share of low-income students)	35,676	32,302	-9.5%	50,509	58,742	16.3%
<b>State totals</b>	<b>74,813</b>	<b>71,102</b>	<b>-5.0%</b>	<b>50,327</b>	<b>58,573</b>	<b>16.4%</b>

Includes data from 317 out of 328 operating school districts

Teacher salary growth is also lagging. Among districts with available data, average salaries—calculated as the total expenditure on salaries divided by the number of full-time equivalent teachers—grew by 16.4 percent statewide, 8 percentage points slower than inflation. But averages may not tell the whole story. Because of the nature of teacher salary schedules, districts that employ higher shares of new or less senior teachers will have lower average salaries for the same staffing levels, complicating fair comparisons across districts.

It is difficult to determine how much of the declines in instructional spending and in staffing is attributable to fiscal constraints versus labor market factors such as retirements and difficulties with recruitment and retention versus enrollment declines. For instance, districts in the highest quartile have experienced a higher rate of enrollment loss than districts in the other three quartiles, so it may be reasonable to see greater declines in teaching staff and instructional spending for those districts.

At the state level, the best proxy available for measuring the impact of staffing trends on students is the student-teacher ratio. Table 10 shows that the cuts in staffing levels did yield an increase in the student-teacher ratio between 2002 and 2007. However, that increase was slight: from 12.6 students per teacher in 2002 to 12.9 students per teacher in 2007, a 2.4 percent increase. Districts with the largest share of low-income students followed the state trend, while districts with the smallest share saw faster increases.

While this trend is encouraging, it is important not to confuse student-teacher ratios with class sizes. Presently, there is no way to determine class sizes using state-level data. The Department is only now beginning to gather the data that it will need to calculate class sizes in the future through the new Education Personnel Information Management System (EPIMS). EPIMS will provide much more detailed information about the teacher labor market than has been available in the past.

Table 10: Average student-teacher ratios, 2002 and 2007

Student-Teacher Ratios	FY02	FY07	Raw change	Percentage point change
Lowest quartile (smallest share of low-income students)	13.9	14.4	0.5	3.6%
Second quartile	13.6	13.8	0.1	1.5%
Third quartile	12.9	12.6	-0.3	-2.3%
Highest quartile (highest share of low-income students)	11.7	12.0	0.3	2.6%
<b>State totals</b>	<b>12.6</b>	<b>12.9</b>	<b>0.3</b>	<b>2.4%</b>

Includes data from 317 out of 328 operating school districts

It appears that districts are doing their best to minimize the impact of weak fiscal conditions on the classroom, maintaining student-teacher ratios even as instructional spending and staffing decline. In some cases, staff reductions have compensated for higher-than-average salary increases but may reduce other educational services to students. In other cases, lower-than-average salary increases have helped maintain staffing levels but leave the district at risk of not being able to attract qualified new teachers. But total expenditures are barely keeping pace with inflation, and non-instructional spending is consuming a growing share of district expenditures. It is unlikely, therefore, that instructional spending is increasing at the rate it should to cover the cost of meeting the increased expectations placed on districts, schools, teachers, and students.

### **Conclusions and next steps**

State data suggests that many districts across the state are experiencing difficulties in shouldering the cost of educating their students. The average district spends 18 percent above the amount assumed by foundation budget, suggesting that the foundation budget alone may not be sufficient to provide an adequate education to all students. Many districts also experienced cuts in state aid for education in the early 2000s and are just now beginning to regain the ground they lost at that time. And declines in overall enrollment coupled with shifts towards more costly to educate students within the enrolled population have added to districts' fiscal challenges in recent years.

In most cases, districts have managed to maintain total spending by increasing local contributions to school funding, but spending on instructional services has declined as a share of total expenditures because of pressure from rising fixed costs. At the same time, increasing expectations for districts, schools, teachers, and students have made the educational task of districts all the more challenging. At a time when districts need to be moving forward quickly to address their students' educational needs, they are hard-pressed to maintain their expenditure levels, let alone increase them to meet higher expectations.

The assumptions behind the foundation budget appear to have grown out of alignment in the 15 years since they were established, particularly in the areas of health insurance, special education,

and teacher salaries. In addition, the foundation budget has not been updated to consider the potential increased costs that might be associated with recent changes in the Commonwealth's education reform strategies.

The current state-wide foundation budget is \$8.4 billion. Some short-run increase in this funding level is likely necessary to address the rising cost of education in the Commonwealth. Beyond that, the Board may wish to recommend a detailed study to update the foundation budget formula to ensure that it provides an adequate level of fiscal resources for both current and future needs.

While the state continues to work toward a sustainable long-range funding plan, it will need to continue other initiatives to ensure that it is making the best use of its existing resources.

Examples include:

- Providing incentives for local participation in the state health insurance and pension fund programs, to help bring the cost of these programs under control.
- Expanding the use of educational collaboratives and other regional entities to more efficiently provide services such as special education transportation, professional development, and specialized education programs.
- Helping districts to identify and adopt instructional practices and models that have been proven effective at improving student outcomes at a reasonable cost.
- Addressing the inefficiencies and lack of capacity created by the large number of small school districts in the state. Currently, 284 of the state's 328 operating districts have fewer than 5,000 students.

The state is expected to increase its commitment to Chapter 70 funding this year despite tight fiscal conditions statewide and the prospect of slow economic growth. These additional resources will help to alleviate these challenging fiscal conditions. But the solution is not more money alone. Additional financial resources should be coupled with better district business practices and new ideas for ways to conserve resources if they are to have maximum impact. Furthermore, the state will need to provide support, leadership, and information to school districts to help them serve their students as effectively and efficiently as possible. Bringing all these resources to bear will allow districts to provide an adequate education to every child and allow the state to reach the vision and promise of education reform.



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# American Stars

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## American Stars of Teaching

American Stars recognizes and honors superior teachers with a track record of improving student achievement, using innovative instructional strategies, and making a difference in the lives of their students. These teachers will be highlighted as representatives of the thousands of teachers who are making a difference in the classroom. The next group of American Stars of Teaching will be identified in each state and the District of Columbia and will represent all grade levels and disciplines. Officials from the U.S. Department of Education will again be visiting the classes of each American Star to congratulate them on their success.

Nominations were accepted from January 2 through March 31, 2008. Winners will be announced this fall.

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## Massachusetts Comprehensive Assessment System

### New Features Planned for the Massachusetts English Proficiency Assessment (MEPA) Program

To: Superintendents, Principals, and Directors of Charter Schools, Educational Collaboratives, Institutional Schools, and Approved Special Education Private Schools

Copy: English Language Learner Program Directors

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: January 24, 2008

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As you are aware, the Massachusetts English Proficiency Assessment (MEPA) is the state's English proficiency assessment for English language learners. The contract for the MEPA was recently put out for bid and after a competitive process, the Department of Education has awarded a contract for the development and implementation of the MEPA program in 2008-2012 to Measured Progress of Dover, New Hampshire.

The purpose of this memo is to inform you of several important new features planned for the MEPA program over the next five years.

### New K-2 Reading and Writing Tests

As you know, the federal No Child Left Behind (NCLB) law requires states to assess all limited English proficient students in grades K-12 in reading, writing, speaking, and listening. In response to this mandate, the Department of Education will develop new reading and writing tests for grades K-2. These tests will be administered to all K-2 LEP students for the first time in spring 2009 and will be based on the *English Language Proficiency Benchmarks and Outcomes for English Language Learners*, as are the current MEPA tests for grades 3-12.

These tests will include age-appropriate test items and will allow a student to provide responses either by pencil, speaking, or pointing to their selected responses, which will be transcribed by the test administrator into an answer

booklet. The Department will conduct a small-scale pilot for these new tests in late winter or early spring 2008.

## Shift to Online MEPA Testing

Many states are exploring the use of online (i.e., computer-based) testing as an alternative to traditional paper-and-pencil assessments because they provide results more quickly, allow students to use the technology they already use in their classrooms, and reduce the use of paper. After carefully examining the availability of current technology in Massachusetts schools, and since LEP students comprise only a portion of the student population in most schools, Massachusetts will move gradually to online testing for a portion of LEP students in grades 3-12, beginning with the spring 2009 MEPA-R/W. The Department will invite schools to participate in online MEPA testing on a voluntary basis beginning in spring 2009, and plans to meet the following minimum participation goals each year of the new MEPA contract:

- 20 percent of LEP students participating in 2009
- 40 percent of LEP students participating in 2010
- 60 percent of LEP students participating in 2011 and 2012

The Department will also provide considerable support and staff training to schools with LEP enrollment to make this transition possible. The MEPA online testing initiative will also make it possible to transition thoughtfully to an online testing program for all students in the future.

## New "Locator" Tests to Support Schools

As you recall, the current MEPA program requires students to take two of three available reading test sessions, and two of three writing test sessions. In the past, schools have been required to evaluate which pair of reading and writing test sessions would be most appropriate for each student, based on the school's evaluation of the student's overall performance in that area. In response to your feedback, the new MEPA program will provide schools with "locator" tests in each grade span, which will be administered to all LEP students immediately prior to the MEPA administration. The "locator" test, which will include approximately fifteen questions each in reading and writing, and require approximately 30 minutes to administer, will identify the most appropriate pair of test sessions to administer to each LEP student.

More information on the future plans for MEPA will be provided at the MCAS/MEPA Spring 2008 Administration Workshops in February. I hope you will be able to attend.

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