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## The Massachusetts Board of Elementary and Secondary Education

### Board Documents - September 27, 2007

Regular Meeting Agenda  
 Massachusetts Board of Education  
 John J. Duggan Middle School  
 1015 Wilbraham Road  
 Springfield, MA 01109  
 Thursday, September 27, 2007 9:00 a.m.

Comments from the Chairman  
 Comments from the Commissioner  
 Statements from the Public

#### Routine Business:


Approval of the Minutes of the August 28, 2007 Regular Meeting - Vote

#### Items for Discussion and Action:

1. [Update on Commonwealth Pilot Schools](#) – Discussion
2. [Student Performance and College Readiness: Preliminary Findings from 2007 State-level MCAS Results and the School-to-College Database](#) – Discussion
3. [Supports for Students](#) – Discussion
4. Charter Schools
  1. [Anticipated Schedule for Board Actions in FY 2008](#) – Discussion
  2. [Waiver of 603 CMR 1.12\(2\) for Renewal Application Deadline for New Leadership Charter School](#) – Discussion and Vote
  3. Charter Renewals for Four Schools ([Abby Kelley Foster](#), [Foxborough Regional](#), [Mystic Valley Regional](#), and [Sturgis](#)) – Initial Discussion
  4. [Charter Amendments for Three Schools \(Hill View Montessori, MATCH, and Rising Tide\)](#) – Discussion and Vote
5. [Schedule for Reviewing and Updating Curriculum Frameworks](#) - Continuing Discussion

## 6. Approval of Grants - Vote

### Other Items for Information:

7. Press Coverage on Board of Education
8. Governor's Commonwealth Readiness Project Subcommittees
9. Wall Street Journal Op-Ed Piece: "Not By Geeks Alone"
10.   Massachusetts *Education Research Brief*: "Current Trends in School Finance"

There will also be a special meeting of the Board of Education on Wednesday, September 26, 2007, from 7:00 p.m. to 9:30 p.m. at the Sheraton Springfield Monarch Place.

last updated: September 18, 2007

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## The Massachusetts Board of Elementary and Secondary Education

### Commonwealth Pilot Schools Update

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 18, 2007

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In November 2006, Commissioner Driscoll recommended that the Board formally declare four schools - Academy Middle School in Fitchburg, the English High School in Boston, and the Duggan Middle School and Putnam Vocational Technical High School in Springfield - to be chronically underperforming schools within the meaning of G.L. c. 69, section 1J, the state statute on school performance accountability.

The four had been formally designated as *underperforming* schools three years earlier. Notwithstanding the various improvement efforts made by faculty and leaders in the schools and district staff, in the two years following Board approval of the schools' improvement plans, these four schools failed to demonstrate significant gains in student improvement and were found not to have created the necessary conditions for improved performance in their schools.

As an alternative to designating the four schools *chronically underperforming*, Board Chairman Anderson recommended that the Boston, Fitchburg and Springfield public school districts be given the option, by agreement of district management and local teachers' union leaders, to convert the four schools into Commonwealth Pilot Schools. The schools would remain within the district, but have school-based decision-making authority to be exercised by a participatory school governing board, under the direction and oversight of the district superintendent and the Commissioner of Education.

In December 2006, the Department developed guidelines for the new Commonwealth Pilot Schools program, and engaged the Center for Collaborative Education (CCE) to provide assistance and support to the districts during the planning and early implementation phases of this new program. CCE staff have extensive experience supporting pilot school development and support with the Boston Public Schools, where pilot schools have been an organizational option since 1995. A copy of the Commonwealth Pilot School Program Guidelines is included with this memorandum for your information.

In February 2007, the Department received applications from Boston, Fitchburg and Springfield outlining their preliminary plans and actions taken to prepare for the four schools to convert to Commonwealth Pilot Schools. As a result of the short planning window prior to the application deadline, there were still many matters to be worked out at that point, but the Department recommended that the Board give preliminary approval for all four schools to be accepted as Commonwealth Pilot Schools. In March 2007, the Board voted this approval.

In April 2007, the Department reconvened the panels that reviewed and advised the Department on the schools' initial applications, and conducted a second review to assess each school's progress in preparing for implementation of the school redesign elements included in its Commonwealth Pilot School conversion application. District and school leaders were provided feedback and recommendations from the practitioners who served on the review panels, and the Department deemed the schools to be making satisfactory progress in their planning and preparations for a September 2007 launch as Commonwealth Pilot Schools.

We are pleased to report that all four schools have had a positive school opening and are working diligently to bring to fruition the visions for school change that emerged from the Commonwealth Pilot School conversion planning sessions that they participated in last winter. At our meeting on September 27th, CCE Executive Director Dan French, Springfield Superintendent Joseph Burke, Springfield Union President Timothy Collins and Duggan Middle School Principal Jonathan Swan will provide us with some details on the changes accomplished to date and some of the challenges of converting to a Commonwealth Pilot School.

In addition to bringing you this update on the current Commonwealth Pilot Schools, I am pleased to inform you that we are working with the CCE and the Boston Foundation to encourage more Commonwealth Pilot Schools. With the Board's approval, we propose to invite a second cohort of up to 12 schools currently at risk of being designated chronically underperforming to apply to become Commonwealth Pilot Schools in the coming year. The schools would be from up to six additional school districts, and we anticipate at least two Commonwealth Pilot Schools per district. They would participate in the school redesign and conversion planning process during the 2007-08 school year in anticipation of reopening as Commonwealth Pilot Schools at the start of the 2008-09 school year. The CCE will again provide support to districts and schools engaging in this planning, and the Boston Foundation has announced a grant opportunity to help fund the costs incurred by the district design teams. This grant opportunity is open to both districts considering Commonwealth Pilot School conversions and districts exploring the establishment of voluntary pilot school conversions. Associate Commissioner Juliane Dow will join us at the meeting to answer any questions that Board members may have regarding the Commonwealth Pilot School program.

Enclosures:

[M.G.L., Chapter 69: Section 1D](#)

[2007 Guidelines for Commonwealth Pilot Schools Option](#)

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## The Massachusetts Board of Elementary and Secondary Education

### Student Performance and College Readiness in Massachusetts

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 18, 2007

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One of the Department's goals is to challenge all students to proficiency and beyond, so that our high school graduates are prepared to succeed in college and in careers. At this month's Board meeting, we will present new data on the progress our students are making towards proficiency and how students' performance on the grade 10 MCAS assessments relates to their future success in college. These data will set the stage for a discussion on the MassCore recommended high school core curriculum next month.

We will provide you with a brief overview of the 2007 statewide MCAS results, which were released on September 12. Some highlights include:

- Nearly 9 out of 10 students in the class of 2009-87 percent-passed both the English Language Arts and Mathematics assessments last spring on their first try, up from 84 percent in 2006 and 68 percent in 2001.
- In grades 3-8, the percent of students scoring Proficient or Advanced in mathematics rose by 5 to 8 percentage points; in grades 4-7, the percent of students scoring at the top 2 levels in English Language Arts increased by 3 to 6 percentage points.

Next, we will provide you with some information derived from our new School-to-College database. The database, funded by a National Governors Association grant and developed in partnership by the Department of Elementary and Secondary Education and the Board of Higher Education, allows us for the first time to track public high school graduates who enroll in the state's public colleges and universities. The database currently includes data on nearly 65,000 Massachusetts public high school graduates from the classes of 2003, 2004, and 2005 who enrolled in a Massachusetts public institution of higher education between 2003 and 2006. Information from the School-to-College Database will be provided to schools and districts in annual reports, as well as in a statewide public report, beginning this winter. We will use the database to inform policy decisions by the Department and the Board of Education.

The database is a useful tool for learning more about the connections between proficiency in high school as measured by the MCAS and readiness for college. The Board presentation will focus on one aspect of this: how proficiency relates to the need for remedial (developmental) coursework. Preliminary results indicate that about one-third of the state's public high school graduates enrolled in public higher education required at least one remedial course during their fall semester in college. More than one-quarter of the students at Needs Improvement on the grade 10 ELA assessment, and half of those at Needs Improvement on the grade 10 mathematics assessment, required remediation in that subject in college. At the same time, those students who had achieved Proficient or Advanced in high school were substantially less likely to require remediation. For instance, less than 4 percent of students scoring Proficient or Advanced on the grade 10 ELA assessment required remedial reading, and less than 10 percent required remedial writing.

This year's statewide MCAS results and the School-to-College Database results suggest that while student performance is improving substantially, students who do not reach proficiency in high school may face difficulties in succeeding in college. We will conclude by summarizing some of our efforts to challenge all students to proficiency and beyond.



### **2007 State MCAS Results and Preliminary Findings from the School-to-College Database**

[Help for Viewing PowerPoint Presentation](#)

last updated: November 29, 2007

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## The Massachusetts Board of Elementary and Secondary Education

### Supports for Students

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 17, 2007

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As Chairman Reville said in his opening remarks at the August Board meeting, "The Commonwealth needs to provide the resources, expertise, direction and opportunities for our educators to do what is essentially a new job, educating all students to at least a level of proficiency. In addition, the work of educating all students goes beyond the boundaries of traditional K-12 schools. Early childhood education, human and social services, expanded school time and after school and summer programming are all needed in addition to a robust Department of Elementary and Secondary Education capable of providing high quality technical assistance and support to all school districts."

Academic "gateway" skills are essential, but children need a well-rounded education program that goes beyond core subjects. The arts, physical activity, and comprehensive health education should be a part of every child's education experience. In addition, some children need other supports that address their emotional and mental health needs, their families' needs for housing, and their parents' needs for assistance to overcome their own academic and /or language barriers. In many cases, these services may be provided by other agencies and community-based organizations working in partnership with the school district.

The Department is working with other agencies and organizations to assist schools and districts to address the multiple needs of children and their families. The attached document highlights a number of these federally- and state-funded initiatives. We know that more work is needed to coordinate and build upon the enrichment and support resources available for the Commonwealth's students.

I intend to have an initial discussion with the Board on this area this month, with follow up discussions throughout the year. In addition, the Board will begin discussion of its budget priorities for FY 2009 at the October meeting. The budget proposal that the Board files is an important vehicle for expanding, strengthening, and coordinating the supports for students. We look forward to further discussion of these issues with the Board.





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## The Massachusetts Board of Elementary and Secondary Education

### Board of Education Schedule - Charter Schools - 2007-08

#### Anticipated Schedule for Board Actions in FY 08

| Month          | Item  | Board Action             |
|----------------|---|--------------------------|
| September 2007 | Charter renewals: Sturgis Charter Public School; Abby Kelley Foster Charter Public School; Foxborough Regional Charter School; Mystic Valley Regional Charter School                    | Discussion               |
|                | Waiver request for missed application for renewal deadline: New Leadership Charter School   | Vote                     |
|                | Amendment requests (enrollment increases &/or grade changes): Christa McAuliffe Regional Charter Public School; Hill View Montessori Charter Public School; MATCH Charter Public School | Vote                     |
| October 2007   | Charter renewals: Sturgis Charter Public School; Abby Kelley Foster Charter Public School; Foxborough Regional Charter School; Mystic Valley Regional Charter School                    | Vote                     |
|                | Amendment request (curriculum model or whole school design): Uphams Corner Charter School   |                          |
|                | Dissemination grant awards  | Vote                     |
| November 2007  | Report & possible recommendation on Benjamin Banneker Charter Public School - end of two-year conditions.   | Discussion/possible vote |
|                | School Improvement Plans/fall 2007 reports on Uphams Corner Charter School; Boston Renaissance Charter Public School; North Central Charter Essential School                            | Information Section      |
| December 2007  | Charter renewals: Smith Leadership Academy Charter Public School; New Leadership Charter School; Four Rivers Charter Public School  | Discussion               |



|               |  |                     |
|---------------|--|---------------------|
|               | Revised Protocol for Charter School Year Five Inspection   | Vote                |
|               | Revised Protocol for Charter School Pre-Renewal Inspection   | Discussion          |
| January 2008  | Charter renewals: Smith Leadership Academy Charter Public School; New Leadership Charter School; Four Rivers Charter Public School   | Vote                |
|               | Charter renewals: Excel Academy Charter School; Boston Day and Evening Academy Charter School; Health Careers Academy Charter Public School; Boston Collegiate Charter School; Rising Tide Charter Public School | Discussion          |
|               | Revised Protocol for Charter School Pre-Renewal Inspection   | Vote                |
|               | Commissioner's recommendation on granting of new charters  | Information section |
| February 2008 | Charter renewals: Excel Academy Charter School; Boston Day and Evening Academy Charter School; Health Careers Academy Charter Public School; Boston Collegiate Charter School; Rising Tide Charter Public School | Vote                |
|               | Commissioner's recommendation on granting of new charters  | Vote                |

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## The Massachusetts Board of Elementary and Secondary Education

### New Leadership Charter School - Waiver of 603 CMR 1.12(2)

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 20, 2007

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Pursuant to 603 C.M.R. § 1.03(2), New Leadership Charter School (NLCS), a Horace Mann charter school, requests a waiver of the deadline for submission of its Renewal Application. Enclosed is a copy of this request. I recommend that the Board grant this waiver.

At 603 C.M.R. § 1.12(1), the Charter School Regulations state that every charter school desiring renewal "shall submit its application for renewal . . . no later than August 1 after the end of fourth school year." While NLCS submitted a renewal application on August 1st, its application was incomplete because it did not include the approval of the school committee and the local teachers' union, as required by 603 C.M.R. § 1.12(2) ("Applications for the renewal of Horace Mann charters must be submitted with the approval of the local teachers' union and the local school committee."). On September 10, 2007, the Department received the requisite signatures and, as of that date, NLCS's application became complete.

If you have any questions regarding this waiver request or require additional information, please contact Mary Street, Director of Charter Schools, or me.

Enclosure: Letter from NLCS

last updated: September 21, 2007



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## The Massachusetts Board of Elementary and Secondary Education

### Charter Renewal - Initial Discussion for Abby Kelley Foster Charter Public School

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 20, 2007

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This month, the Board will have its initial discussion of the charter renewal application of Abby Kelley Foster Charter Public School (AKFCPS), a regional charter school. The Board will vote on this renewal at its meeting on October 30, 2007.

#### Basis of Recommendations Regarding the Renewal of Charters

The charter school regulations state that "[t]he decision by the Board to renew a charter shall be based upon the presentation of affirmative evidence regarding the success of the school's academic program; the viability of the school as an organization; and the faithfulness of the school to the terms of its charter" 603 CMR 1.12. Consistent with the regulations, recommendations regarding renewal are based upon the Department's evaluation of the school's performance in these areas. In its review, the Department has considered both the school's absolute performance at the time of the application for renewal and the progress the school has made during the first four years of its charter.

The superintendents of districts sending students to each school have been invited to submit written comment to the Department regarding the renewal of each school's charter. No written comment was received from these superintendents.

The summary document that follows this memorandum was prepared for you as a compilation of the school's record for the term of this charter. The accountability process for charter schools recognizes that in exchange for increased freedom, a school must demonstrate results within the term of its five-year charter or risk non-renewal. I recommend that the Board renew the charter for Abby Kelley Foster Charter Public School based on the evidence gathered in the attached Summary of Review and as further summarized below.

## **I. Academic Success**

- AKFCPS serves students in grades K-12 with a program focused on a classical liberal arts education that includes art, music, French, and Latin.
- The school has recently reviewed, further developed, and documented its curriculum across all grades and subjects, including alignment with the standards in the Massachusetts Curriculum Frameworks.
- Site visit teams from the Charter School Office and members of the renewal inspection team found a variety of instructional practices and levels of student engagement with whole class, teacher-directed strategies being prevalent. Student engagement was high in the elementary school and decreased from the middle school to the high school. Relationships between students and teachers are reported as strong.
- AKFCPS made Adequate Yearly Progress (AYP) in ELA in the aggregate in all years between 2003 and 2006. AKFCPS did not make AYP in ELA in 2003 for African-American students. AKFCPS made Adequate Yearly Progress (AYP) in Mathematics in the aggregate in all years between 2003 and 2006. AKFCPS did not make AYP in Mathematics in 2003 or 2006 for African-American students.
- AKFCPS utilizes an appraisal system known as the All School Review (ASR) that requires all homeroom teachers to report on the educational, social, and emotional strengths and needs of each of their students to a team comprised of teachers, support staff, and administrators.

## **II. Organizational Viability**

- AKFCPS is fiscally sound and stable.
- Despite a number of changes in the structure and personnel of AKFCPS's administration over the past three years, three site visit and renewal inspection teams reported effective leadership of the school.
- The AKFCPS Board consists of seven members, three of whom are founders of the school. The site visit and renewal inspection teams reported effective management along with positive development of board governance practices, including the addition of subcommittees and the practice of conducting an annual self-evaluation.
- The school reports high levels of parent satisfaction through the results of a parent survey.
- AKFCPS maintains full enrollment and a waiting list.

## **III. Faithfulness to Charter**

- The mission of AKFCPS is to "assist parents in their role as primary educators of their children by providing a classical liberal arts education grounded in the great works of Western Civilization and aimed at academic excellence, musical competence and character formation." The music program permeates the school and curriculum, all students begin to study Latin in seventh grade, and pupils are familiar with the ten character virtues, one of which is emphasized each month.
- Subsequent to a Coordinated Program Review in October of 2002, AKFCPS developed a Corrective Action Plan (CAP). A Department summary prepared after the school's most recently submitted CAP progress report indicated that the school has yet to implement several significant aspects of the CAP regarding special education and English language learners.

## **IV. Dissemination**

- Four members of the staff made a presentation on the All School Review at the Massachusetts Charter Public School Association Best Practices Showcase in March 2007.
- Administrators and teachers have hosted professional development sessions regarding behavior management, character education, and teaching techniques to charter and non-charter public schools.

If you have any questions regarding this renewal recommendation or require additional information, please contact Jeff Wulfson, Associate Commissioner, at 781 338-6500, Mary Street, Director of Charter Schools, at 781 338-3200, or me.

Enclosure:   Summary of Review

last updated: September 21, 2007

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## The Massachusetts Board of Elementary and Secondary Education

### Charter Renewal - Initial Discussion for Foxborough Regional Charter School

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 20, 2007

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This month, the Board will have its initial discussion of the charter renewal application of Foxborough Regional Charter School (FRCS). The Board will vote on this renewal at its meeting on October 30, 2007.

#### Basis of Recommendations Regarding the Renewal of Charters

The charter school regulations state that "[t]he decision by the Board to renew a charter shall be based upon the presentation of affirmative evidence regarding the success of the school's academic program; the viability of the school as an organization; and the faithfulness of the school to the terms of its charter." 603 CMR 1.12. Consistent with the regulations, the recommendations regarding renewal are based upon the Department's evaluation of the school's performance in these areas. In its review, the Department has considered both the school's absolute performance at the time of the application for renewal and the progress the school has made during the first four years of its charter.

The superintendents of districts sending students to each school have been invited to submit written comment to the Department regarding the renewal of each school's charter. No written comment was received from these superintendents.

The summary document that follows this memorandum was prepared for you as a compilation of the school's record for the term of this charter. The accountability process for charter schools recognizes that in exchange for increased freedom, a school must demonstrate results within the term of its five-year charter or risk non-renewal. I recommend that the Board renew the charter for Foxborough Regional Charter School based on the evidence gathered in the attached Summary of Review and as further summarized below.

## **I. Academic Success**

- FRCS offers students a college preparatory program in grades K-12 based on a comprehensive set of curriculum maps that are aligned to the Massachusetts Curriculum Frameworks.
- Site visit teams from the Charter School Office and members of the renewal inspection team consistently observed positive relationships between teachers and peers and sound instructional practices in FRCS classrooms.
- FRCS attained AYP in the aggregate for English language arts (ELA) and Mathematics in all four years of the current charter term at levels higher than state targets, though the school's CPI has decreased each year during this charter term in both subjects. The school did not make AYP in ELA in 2005 for the subgroups of Special Education and African-American students or in Mathematics in 2003 or 2006 for the subgroup of Special Education students.
- FRCS met state Competency Determination targets in all years between 2003 and 2006, with 100 percent of its seniors passing both the ELA and Mathematics sections of the grade 10 MCAS exams.

## **II. Organizational Viability**

- FRCS is financially sound and stable.
- The FRCS Board consists of seven members. Four are longstanding members who have been with the school since its early years, and three have been added to the Board within the past year as part of a recent effort to increase its size. The Board has met regularly throughout the term of its second charter and has eight committees: curriculum, development, personnel, enrollment, board development, facilities, finance, and technology.
- The school reports high levels of parent satisfaction through the results of a parent survey.
- FRCS maintained full enrollment with waitlists for most years during this charter term.

## **III. Faithfulness to Charter**

- The renewal inspection team found that the FRCS curriculum and instruction reflect the school's commitment to providing its students with a challenging academic program that prepares them for college and that the school's Student Life and Community Service Learning Program reflects and promotes the school's mission to prepare students to be good citizens and community leaders.
- FRCS has successfully completed all Coordinated Program Review requirements for this cycle.

## **IV. Dissemination**

- In 2006 and 2007, members of the FRCS community presented a workshop at the spring Charter School Best Practices Showcase focused on the Student Life and Community Service Program.
- Throughout the 2005-06 school year, representatives from the Foxborough and Stoughton school districts attended curriculum-mapping training offered by FRCS; in return, FRCS faculty attended sessions on data-driven analysis offered by the Stoughton school district.
- FRCS has hosted teams from other charter schools to share information on FRCS programs.

If you have any questions regarding this renewal recommendation or require additional information, please contact



Jeff Wulfson, Associate Commissioner, at 781 338-6500, Mary Street, Director of Charter Schools, at 781 338-3200, or me.

Enclosure:   Summary of Review

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## The Massachusetts Board of Elementary and Secondary Education

### Charter Renewal - Initial Discussion for Mystic Valley Regional Charter School

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 20, 2007

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This month, the Board will have its initial discussion of the charter renewal application of Mystic Valley Regional Charter School (MVRCS). The Board will vote on this renewal at its meeting on October 30, 2007.

#### Basis of Recommendations Regarding the Renewal of Charters

The charter school regulations state that "[t]he decision by the Board to renew a charter shall be based upon the presentation of affirmative evidence regarding the success of the school's academic program; the viability of the school as an organization; and the faithfulness of the school to the terms of its charter" 603 CMR 1.12. Consistent with the regulations, the recommendations regarding renewal are based upon the Department's evaluation of the school's performance in these areas. In its review, the Department has considered both the school's absolute performance at the time of the application for renewal and the progress the school has made during the first four years of its charter.

The superintendents of districts sending students to each school have been invited to submit written comment to the Department regarding the renewal of each school's charter. No written comment was received from these superintendents.

The summary document that follows this memorandum was prepared for you as a compilation of the school's record for the term of this charter. The accountability process for charter schools recognizes that in exchange for increased freedom, a school must demonstrate results within the term of its five-year charter or risk non-renewal. I recommend that, based on the evidence gathered in the attached Summary of Review and as further summarized below, the Board renew the charter for Mystic Valley Regional Charter School.

## **I. Academic Success**

- Mystic Valley offers a program based on the use of nationally recognized curriculum models. The primary components of the curriculum are the Direct Instruction literacy program, the Core Knowledge program for history, geography and science, and Saxon math.
- The school received authorization to implement the International Baccalaureate Programme in April 2005. The school has begun to implement this program as an option for students in grades 11 and 12.
- Site visit teams from the Charter School Office found that curriculum in the lower school was well documented and aligned with state frameworks, but that curriculum in the upper school was not as well documented. The Renewal Inspection team found that the curriculum was well developed and rigorous for all grade levels.
- Site visit teams from the Charter School Office found that instruction in the lower school was generally effective and reflective of high academic standards, but that students in the upper school were less engaged and were not asked to employ critical thinking skills. Members of the renewal inspection team found rigorous classroom instruction and high academic standards throughout the school.
- Student performance at all grade levels is frequently assessed. Assessment data is used to place students into flexible instructional groups.
- MVRCS attained AYP in English language arts and Mathematics in the aggregate in all four years of the current charter term at levels higher than state targets. MVRCS did not make AYP in ELA in 2003 for Special Education students and in 2006 for African-American students, and did not make AYP in Mathematics in 2003 for Special Education or African American students, and in 2006 for Low Income Students.

## **II. Organizational Viability**

- MVRCS is financially sound and stable.
- The school's board consists of five members, the minimum number of members allowed by the school's bylaws. Three of the members have served on the board since the school's founding, one has served for six years, and one has served for four years. To date, the board has refused to comply with the Charter School Office's recommendation that the school's bylaws include a provision for specific reasonable limits on successive or total terms that a member may serve.
- Site visit teams and the renewal inspection team found that the school does not comply with the provisions of the state's Open Meeting Law in that board minutes do not consistently reflect a public declaration of the purpose of the executive session, record votes on the question of whether to convene an open session, and indicate whether the board would reconvene in open meeting after executive session. In addition, matters discussed in executive session do not always fall within the allowable purposes outlined in the Open Meeting Law, and board subcommittees do not maintain minutes.
- MVRCS maintains full enrollment. The school has a waitlist for kindergarten through grade 5. It does not enroll new students after grade 5 and enrollment is substantially lower in the higher grade levels.

## **III. Faithfulness to Charter**

- The mission of the school is to establish "a world class educational environment characterized by a well-mannered, disciplined and structured academic climate." Character education, defined as incorporating the virtues and ideals that are embodied in the Declaration of Independence and the United States Constitution, is integrated into the curriculum throughout the school.

- In August 2007, the Department determined that the MVRCS Mid-cycle Coordinated Program Review Progress Reports do not demonstrate that the school is moving forward to fully implement its Corrective Action Plan. The Department has issued a directive to MVRCS that includes the required steps the school must take to correct previously identified noncompliance areas in special education, civil rights, and English language learners.
- Site visit teams noted strong collaboration between the special and regular education programs.

#### IV. Dissemination

- The National Core Knowledge Foundation designated MVRCS as an Official Core Knowledge Visit School in 2003. Many teams of educators from local and national sites have visited the school to observe the implementation of the Core Knowledge curriculum sequence.
- In December of 2005, representatives of MVRCS and the Malden Public Schools met to begin a dialogue on successful curriculum strategies in science.

If you have any questions regarding this renewal recommendation or require additional information, please contact Jeff Wulfson, Associate Commissioner, at 781 338-6500, Mary Street, Director of Charter Schools, at 781 338-3200, or me.

Enclosure:   Summary of Review

last updated: September 21, 2007

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## The Massachusetts Board of Elementary and Secondary Education

### Charter Renewal - Initial Discussion for Sturgis Charter Public School

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 20, 2007

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This month, the Board will have its initial discussion of the charter renewal application of Sturgis Charter Public School (Sturgis), a regional charter school. The Board will vote on this renewal at its meeting on October 30, 2007.

#### Basis of Recommendations Regarding the Renewal of Charters

The charter school regulations state that "[t]he decision by the Board to renew a charter shall be based upon the presentation of affirmative evidence regarding the success of the school's academic program; the viability of the school as an organization; and the faithfulness of the school to the terms of its charter" 603 CMR 1.12. Consistent with the regulations, the recommendations regarding renewal are based upon the Department's evaluation of the school's performance in these areas. In its review, the Department has considered both the school's absolute performance at the time of the application for renewal and the progress the school has made during the first four years of its charter.

The superintendents of districts sending students to each school have been invited to submit written comment to the Department regarding the renewal of each school's charter. No written comment was received from these superintendents.

The summary document that follows this memorandum was prepared for you as a compilation of the school's record for the term of this charter. The accountability process for charter schools recognizes that in exchange for increased freedom, a school must demonstrate results within the term of its five-year charter or risk non-renewal. I recommend that the Board renew the charter for Sturgis Charter Public School based on the evidence gathered in the attached Summary of Review and as further summarized below.

#### I. Academic Success

- Sturgis serves students in grades 9-12 and offers students in grades 11 and 12 a college preparatory, International Baccalaureate (IB) program. The program is characterized by rigor and high expectations and is available to all students.
- The school has a well-documented curriculum for grades 9 and 10 that is aligned with and goes beyond the Massachusetts Curriculum Frameworks and is also pre-IB.
- Site visit teams from the Charter School Office and members of the renewal inspection team found rigorous classroom instruction and high academic standards.
- Sturgis attained AYP in English language arts and Mathematics in all four years of the current charter term at levels higher than state targets.
- Teachers are expected to participate in at least 25 hours of professional development each year.

## **II. Organizational Viability**

- Sturgis is financially sound and stable.
- The renewal inspection team found a strong administrative team and governance structures.
- The school reports high levels of parent satisfaction through the results of a parent survey.
- Sturgis maintains full enrollment with a waiting list.

## **III. Faithfulness to Charter**

- Sturgis has created a successful and rigorous college preparatory International Baccalaureate program.
- Sturgis was commended by the Department in its most recent Coordinated Program Review for its highly inclusive special education practices.

## **IV. Dissemination**

- Through a dissemination grant from the Department of Elementary and Secondary Education, Sturgis has presented governance workshops to charter and non-charter schools across the state.
- Faculty members regularly make presentations on the International Baccalaureate program.
- The school has participated in additional workshop presentations and exchanges.

If you have any questions regarding this renewal recommendation or require additional information, please contact Jeff Wulfson, Associate Commissioner, at 781 338-6500, Mary Street, Director of Charter Schools, at 781 338-3200, or me.

Enclosure:   Summary of Review

last updated: September 21, 2007



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## The Massachusetts Board of Elementary and Secondary Education

### Charter Schools - Approval of Charter Amendments for Hill View Montessori Charter Public School, MATCH Charter Public High School, and Rising Tide Charter School

To: Members of the Board of Education

From: Jeffrey Nellhaus, Acting Commissioner of Education

Date: September 20, 2007

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Pursuant to the Charter School Regulations, 603 CMR 1.11(1), the Board of Education must approve major changes in the material terms of a school's charter. Each of the following schools has requested an amendment to increase its maximum enrollment. These amendment requests meet the criteria defined in the regulations. If granted, all of these amendments would take effect for the fall of 2008, although in some cases the requested expansion would be phased in over the course of the next few years.

As required by 603 CMR 1.11(5) for requests that seek an increase in maximum enrollment, comment was solicited from the superintendents in the school districts within each charter school's district or region, as well as from superintendents in districts from which the charter school draws a substantial number of students. No letters were received in response to this solicitation.

After analyzing the effect of the proposed increases in maximum enrollment on the 9% net school spending cap for sending districts, the Department has determined that there are sufficient seats available to grant each of these requests.

#### Hill View Montessori Charter Public School

The Board of Trustees of Hill View Montessori Charter Public School (HVMCPS) requests approval for a charter amendment to increase enrollment by 53 students, from 243 students to 296 students, and to add grade 8 to its grade span, as was originally envisioned in its charter application. HVMCPS opened in 2003 and is chartered for the district of Haverhill. Prior to opening, the school received an amendment to include kindergarten in its grade span



and is currently chartered to serve students in kindergarten through grade 7. Consonant with the growth plan outlined in its original charter, the school enrolled 189 students in kindergarten through grade 5 in 2006-07, and 220 students in kindergarten through grade 6 in the fall of 2007. If this amendment is granted, the school plans to enroll 254 students in kindergarten through grade 7 in 2008-2009 and to be fully enrolled at its new capacity and grade span in 2009-2010. The school currently is fully enrolled and has a waiting list of 274 applicants seeking admission to all grade levels, but concentrated in grades kindergarten through four.

HVMCPS's original charter application requested 266 students in grades 1-8. However, when HVMCPS was chartered in 2003, it was granted 243 seats in grades 1-7 to accommodate the school's projected growth plan for its first charter term as outlined in the charter application. At that time, it was anticipated that the school would be granted a request to amend its charter to allow for an increase in enrollment and grade span at the time of charter renewal. The current request to enroll 296 students in grades K-8 would allow the school to grow to the size anticipated by its charter proposal, as amended to include kindergarten.

This year's maximum cap calculation indicates that there are a total of 499 available seats in Haverhill. The school's plan to expand to include grade 8 and to enroll approximately 34 children per grade level is consonant with the intent of the original charter. The school has been preparing to serve this grade span since it opened.

I recommend that the Board of Education approve an enrollment increase of 53 students and the addition of grade 8 for Hill View Montessori Charter School.

### **MATCH Charter Public High School**

The Board of Trustees of MATCH Charter Public High School (MATCH) requests approval for a charter amendment to increase enrollment by 240 students from 220 students to 460 students, and its grade span from grades 9-12 to grades 6-12, beginning in the fall of 2008. The school currently admits students into grade 9 only, and is fully enrolled with a waiting list. MATCH opened in 2000, had its charter renewed in 2004, and is chartered for the district of Boston. If the amendment is granted, MATCH would implement this proposal by admitting its first class of 93 students into grade 6 in 2008-2009, and would be fully enrolled at its new capacity in 2010-2011.

In its request, the school states that if students enter at an earlier grade level and are able to benefit from the same extended day and daily tutoring programs that are already in place at the school, they will be better prepared to meet the standards set by the school's college-preparatory high school curriculum. In this way, the school hopes to reduce its current high student attrition rate, which it attributes to the difficulty students encounter in trying to reach the school's rigorous promotion and graduation standards. Also, because it will have more time to prepare students, the school states its intention to offer additional physical education and other extracurricular options to its students. Finally, with the proposed expansion of the MATCH Corps Tutoring Program to serve the new middle school, the school will create a new teacher training program aimed at expanding the pool of urban educators.

The Department has completed an analysis of the impact of the net school spending cap and has found that there are 587 seats currently available in Boston. With 441 seats remaining in Boston after a 25% reserve has been set aside to allow for fluctuations, there are enough seats available to grant the request, with 201 seats remaining to allow for the possibility of a new Boston-based charter school in the future.

I recommend that the Board of Education approve an enrollment increase of 240 students and the addition of grades six through eight for MATCH Charter Public High School.

### **Rising Tide Charter School**

The Board of Trustees of Rising Tide Charter School (RTCS) requests approval for a charter amendment to increase enrollment from 300 to 320 students. Rising Tide opened in 1998 and had its charter renewed in 2003. The school serves students in grades 5-8, and is chartered to serve students from the district of Plymouth.

In 2003, RTCS was granted an amendment to increase its enrollment cap from 228 to 300. Since then, the school has been gradually increasing enrollment, reaching 300 students for the first time in 2006-07. The school asserts that an enrollment of 300 students is required to maintain a stable student base, allowing for mid-year attrition, which will also ensure financial stability. The school expects to maintain an average annual enrollment of 300-310 students. The proposed plan would add several additional students to each grade level. The resulting increase would not significantly increase class size, impact the use of the facility, or change the staffing pattern.

This year's maximum cap calculation indicates that there are a total of 539 available seats in Plymouth.

I recommend that the Board of Education approve an enrollment increase of 20 students for Rising Tide Charter School.

### **Acting Commissioner's Recommendation**

The Department has reviewed these requests and they appear reasonable and consistent with the charter school statute and regulations. I recommend that the Board approve the amendment requests as presented.

If you have any questions regarding these amendments or require additional information, please contact Jeff Wulfson, Associate Commissioner, at 781 338-6500, Mary Street, Director of Charter Schools, at 781 338-3200, or me.

Enclosures: Correspondence from Hill View Montessori Charter Public School  
Correspondence from MATCH Charter Public high School  
Correspondence from Rising Tide Charter School

last updated: September 21, 2007

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## The Massachusetts Board of Elementary and Secondary Education

### Proposed Schedule and Process for Curriculum Framework Review

To: Members of the Board of Education

From: David P. Driscoll, Commissioner of Education

Date: August 20, 2007

Since passage of the Education Reform Act of 1993, the Board has approved curriculum frameworks in the core subject areas of English language arts (ELA), mathematics, science and technology engineering, history and social science, foreign languages, visual and performing arts, and health. The curriculum frameworks establish state standards for the content that Massachusetts public schools are expected to cover in locally defined curricula, and form the basis for the MCAS assessments in ELA, mathematics, science/technology engineering and history/social sciences.

We can take pride in the fact that the Massachusetts curriculum frameworks are nationally recognized as being strong and sound. At the same time, we are committed to reviewing the frameworks periodically and updating them as needed. In fact, Mass. Gen. Laws Chapter 69, Section 1E directs the Board to "develop procedures for updating, improving or refining" the curriculum frameworks. We propose to establish a routine schedule to ensure that all of the frameworks are systematically reviewed and revised/refined over a five-year cycle.

We anticipate that the process of review and revision/refinement of each framework will take approximately one year - approximately six months for the initial review stage, and six months during which framework revisions or refinements are drafted, considered and adopted. At the conclusion of the first stage, we will report to the Board on the review process and make recommendations for revision and refinement. We will return to the Board for action on any proposed revisions at the conclusion of the second stage.

We propose to launch a five-year cycle of review of the curriculum frameworks in the fall of 2007, beginning with the Commonwealth's ELA Curriculum Framework. The proposed five-year schedule is as follows:

| Content Area | Review Process | Consideration of Proposed Amendments |
|--------------|----------------|--------------------------------------|
|              |                |                                      |

|                                |             |             |
|--------------------------------|-------------|-------------|
| English Language Arts          | Fall 2007   | Spring 2008 |
| Mathematics                    | Winter 2008 | Fall 2008   |
| Science/Technology Engineering | Fall 2008   | Spring 2009 |
| Visual and Performing Arts     | Winter 2009 | Fall 2010   |
| History/Social Science         | Fall 2010   | Spring 2011 |
| Health                         | Winter 2011 | Fall 2011   |
| Foreign Languages              | Fall 2011   | Spring 2012 |

For each framework we propose to convene an advisory group composed of pre-K through grade 12 educators as well as scholars from higher education with expertise in the content areas addressed by the framework. Members of the advisory group will participate in the curriculum framework review process, and will make recommendations to the Department and the Board on proposed revisions/refinements to the framework.

We will establish an open process for nomination of candidates to serve on each advisory group, with active efforts to solicit participation from individuals with expertise and experience across grade levels and subject matter and representing various kinds of schools and districts. If Board members would like to nominate candidates, please contact Acting Commissioner Jeff Nellhaus. The Commissioner will select advisory group members from among all of the well qualified nominees. We expect to have the advisory group for the ELA framework in place by early fall.

Last Updated: August 24, 2007

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# Education Research Brief

September 2007 • Issue 1  
Office of Strategic Planning, Research, and Evaluation

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## Current trends in school finance

Massachusetts school districts are at a fiscal crossroads

*By Robert O'Donnell, Policy Analyst*

Funding public education represents a massive state and local effort. Spending on education is second only to Medicaid in terms of the overall state budget and it consumes the largest share of local tax revenues. Between state and local taxes, Massachusetts taxpayers spent nearly \$11 billion to operate the Commonwealth's PK-12 education system in fiscal year 2006.

School districts across the Commonwealth have faced significant fiscal pressures in recent years. Rapidly increasing health insurance premiums, higher tuition charges for special education students, and slow-growing and declining state aid during the last economic downturn are all contributing to these budgetary challenges.

Recent changes have brought some relief, most notably in funding for special education students, reforms to the Chapter 70 formula and increases in state aid, and restructuring of the School Building Assistance program. Yet, Massachusetts school districts still sit at an important fiscal crossroads.

Balancing rapidly increasing costs with the needs of students is challenging our education system. Examining the recent trends in school district expenditures and revenues during the past five years can shed light on these and other challenges that districts will continue to face in the future.

### Where does the money go?

School districts spend most of their money on providing instructional services for students (see Table 1). Instructional spending amounts to \$6.4 billion statewide and comprises 57 percent of total operating expenditures. Most of the cost of educating students is teacher salaries, comprising \$4.1 billion or 37 percent of total spending. Other instructional services include salaries for principals, curriculum directors, paraprofessionals, librarians, medical and therapeutic staff, and guidance counselors and psychologists. Districts also need to purchase instructional materials and technology and provide professional development programs for their staff. Collectively these and other associated items amount to \$2.2 billion, or 20 percent, of total district spending.

While not considered part of instructional spending, districts spend a significant amount of money on tuitions to send students to schools or programs outside of their home districts.

These include students who attend charter schools or other public school districts through the school choice program. It also includes special education students who attend collaboratives or private day or residential schools. Close to \$940 million, or 8 percent, of district spending goes to cover these tuition costs.

The infrastructure that supports teachers and students in the classroom is also extensive. School districts provide transportation and food services for their students. They also cover a significant percentage of the health insurance costs for teachers and other district staff. Furthermore districts oversee the general maintenance and upkeep of their buildings. These indirect services amount to \$3.5 billion, or 32 percent, of total district operating costs. Administrative costs occupy a relatively small part of the overall spending picture at \$356 million or 3 percent.

**Table 1: School district operating expenditures, all funds (\$ in millions)**

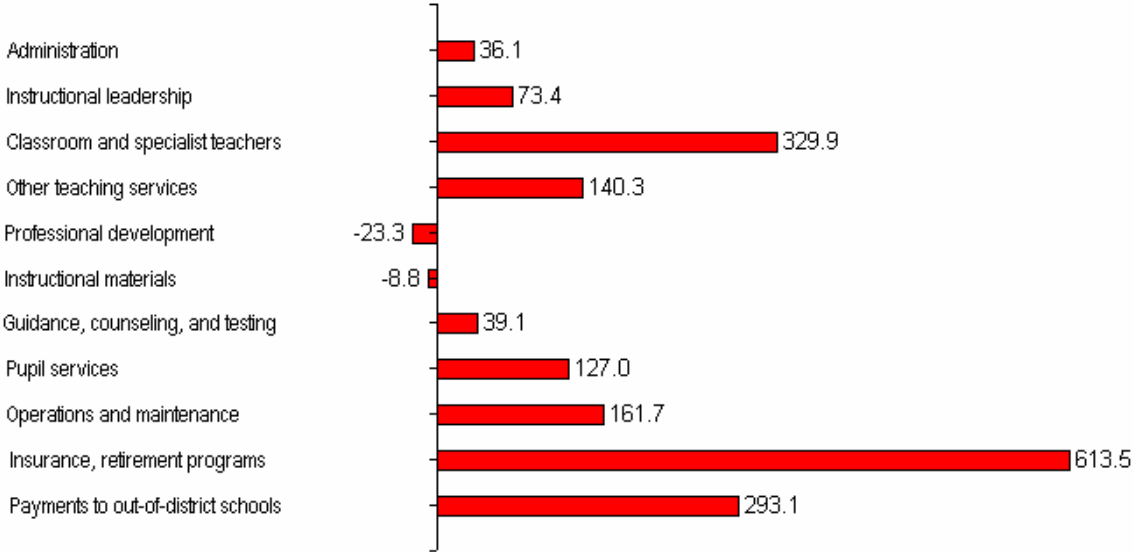
| Spending                              | FY02           | FY03           | FY04            | FY05            | FY06            |
|---------------------------------------|----------------|----------------|-----------------|-----------------|-----------------|
| Administration                        | 320.3          | 327.0          | 324.6           | 345.4           | 356.5           |
| Instructional leadership              | 620.8          | 659.4          | 644.3           | 672.0           | 694.2           |
| Classroom and specialist teachers     | 3,796.1        | 3,869.8        | 3,908.7         | 3,988.0         | 4,126.0         |
| Other teaching services               | 580.8          | 614.6          | 634.9           | 677.8           | 721.2           |
| Professional development              | 205.9          | 212.0          | 201.5           | 184.7           | 182.6           |
| Instructional materials and equipment | 349.7          | 321.3          | 316.4           | 320.8           | 341.0           |
| Guidance, counseling, and testing     | 257.4          | 269.4          | 267.6           | 281.4           | 296.6           |
| Pupil services                        | 843.5          | 870.4          | 873.6           | 892.2           | 970.5           |
| Operations and maintenance            | 749.9          | 759.6          | 781.2           | 834.8           | 911.5           |
| Insurance and retirement programs     | 1,046.2        | 1,183.5        | 1,384.0         | 1,515.9         | 1,659.7         |
| Payments to out-of-district schools   | 645.6          | 717.6          | 802.5           | 891.8           | 938.7           |
| <b>Total operating expenditures</b>   | <b>9,416.4</b> | <b>9,804.5</b> | <b>10,139.4</b> | <b>10,604.8</b> | <b>11,198.5</b> |

Note: Retirement programs do not include payroll contributions to the Massachusetts Teacher Retirement System.  
Source: Massachusetts Department of Education End of Year Pupil and Financial Reports

Between fiscal years 2002 and 2006, district operating expenditures increased by 19 percent, or \$1.8 billion (see Figures 1 and 2).<sup>1</sup> One-third of this increase, or \$614 million, was driven by rapid growth in health insurance costs. This reflects a national trend of rapidly increasing health insurance costs for all employers. School districts are obligated through their collective bargaining agreements to provide a specific level of coverage to their active and retired employees even if the cost of insurance increases. As a result, health insurance as a share of total operating expenditures grew from 11 percent to 15 percent between fiscal years 2002 and 2006 and will likely increase further if current trends continue.

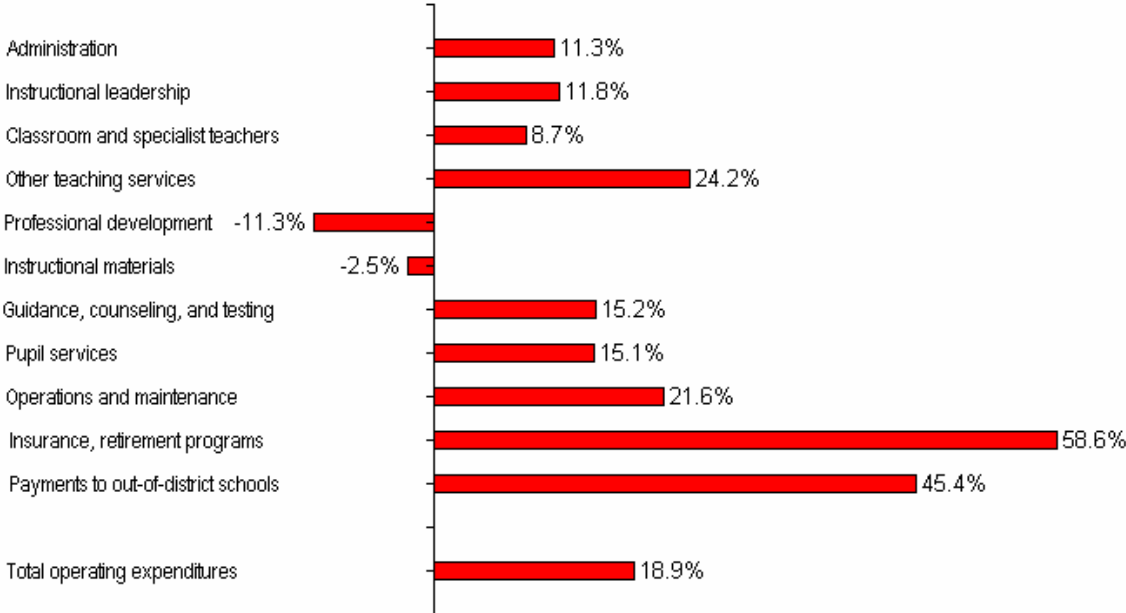
<sup>1</sup> Unless otherwise indicated, all dollars are expressed in nominal terms.

**Figure 1: Change in district operating expenditures, FY02 to FY06**  
 State totals by functional category (\$ in millions)



Note: Retirement programs do not include payroll contributions to the Massachusetts Teachers Retirement System.  
 Source: Massachusetts Department of Education End of Year Pupil and Financial Reports

**Figure 2: Percent change in district operating expenditures, FY02 to FY06**  
 State totals by functional category



Note: Retirement programs do not include payroll contributions to the Massachusetts Teachers Retirement System.  
 Source: Massachusetts Department of Education End of Year Pupil and Financial Reports



Payments to out-of-district schools also increased substantially: by \$293 million or 45 percent. An increase in tuition payments to private special education schools accounted for the largest share of growth in this category. Some of these cost increases were borne by the state through the Circuit Breaker program, which reimburses districts for the expense of educating high-cost special education students, both in-district and out-of-district.

Other teaching services, which includes paraprofessionals, medical and therapeutic services, substitutes, and librarians, also increased by 24 percent. The largest increases in this category were in salaries for paraprofessional and medical and therapeutic staff.

Salaries for classroom and specialist teachers occupy the largest slice of the spending pie, and during this period they grew by \$330 million or 9 percent. Relative to other increasing expenditure categories, teacher salaries grew at the slowest rate. As a result, the share of district operating budgets going towards teacher salaries fell from 40 percent to 37 percent.

The two areas where spending declined were professional development and instructional materials. Professional development spending fell by \$23 million, or a little more than 10 percent. School districts spent less on professional development in response to fiscal pressures and because the state relaxed its \$125 per pupil spending requirement for professional development in fiscal year 2004. The fiscal downturn also affected spending on instructional materials, which declined by \$9 million or 2.5 percent over the same period.

## **Where does the money come from?**

School districts rely on a variety of funding sources to support their operating budgets, including local property taxes, Chapter 70 (state) aid, state reimbursement programs, federal and state grants, and user fees. On average districts receive the majority of their funding from local property taxes, but in fiscal year 2006 there were 64 districts that relied on Chapter 70 aid to fund more than 50 percent of their operating budgets. Reimbursement programs and federal and state grants make up smaller shares of the revenue picture, but these funds play important roles in supporting programs and helping districts deliver needed services.

### *Property taxes*

Unlike school districts in many other states, districts in Massachusetts lack the independent authority to raise property taxes, relying instead on the tax revenues generated by the cities and towns that they serve. As a result, slow growth or constraints on local tax revenues also mean fewer resources available for local schools.

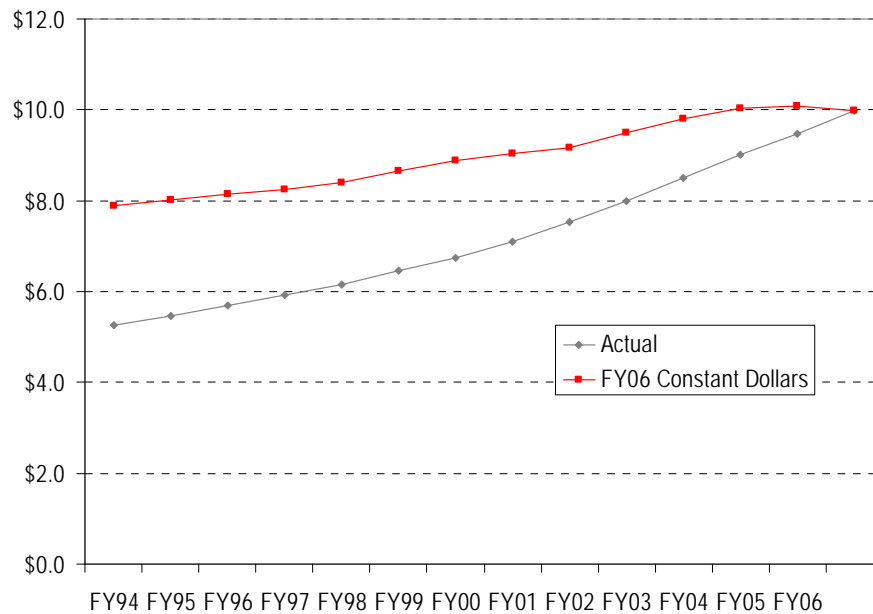
Annual growth in a city or town's tax levy is governed by Proposition 2 ½. Proposition 2 ½ limits annual growth in the amount of property taxes that a municipality can raise to 2.5 percent over the previous year plus receipts from newly taxable property. The law also creates a levy ceiling, limiting the revenue cities and towns can generate from property taxes to 2.5 percent of the total assessed property value in the community.

The annual growth limit may only be exceeded if voters pass an override granting the city or town authority to raise a specific amount of additional revenues to support operating

expenditures. Overrides are always controversial, but recently voters have been rejecting them at higher rates than they have in previous years.

In nominal terms, property tax receipts grew from \$5.4 billion to \$9.9 billion between fiscal years 1994 and 2006: a \$4.5 billion or 83 percent increase (see Figure 3). The growth rate appears much flatter, however, after comparing total statewide property tax receipts in fiscal year 2006 dollars.<sup>2</sup> Looking at revenue growth in real terms shows that tax receipts grew by \$2.0 billion or 25 percent over this period.

**Figure 3: Annual property tax levy**  
Actual versus inflation-adjusted (billions of FY06 dollars)



Source: Massachusetts Department of Revenue Municipal Data Bank

### *State aid: Chapter 70*

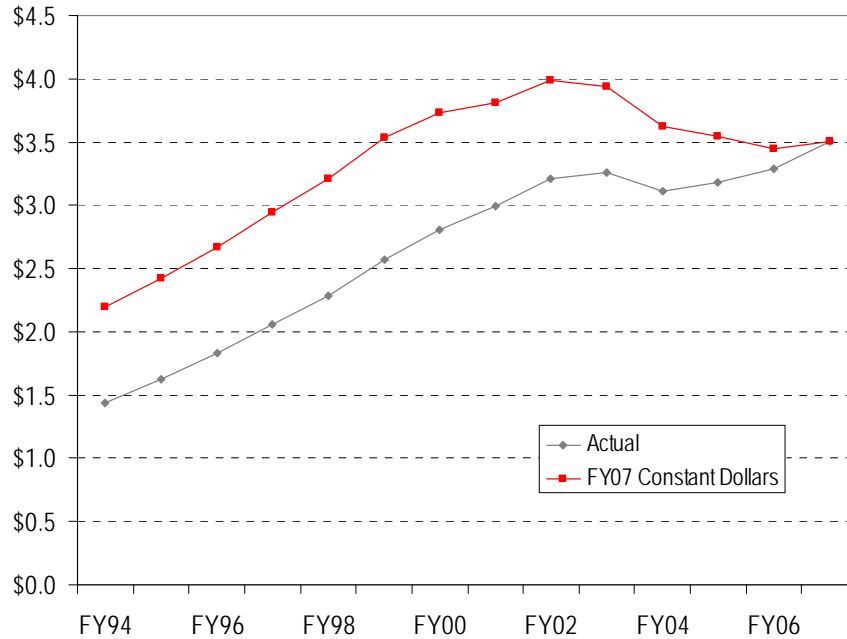
The second major source of operating revenue for schools is state aid, generally referred to as Chapter 70 aid. Chapter 70 aid is distributed through a formula that establishes an adequate spending level for each school district. The goal of the formula is to ensure that every district reaches this spending goal each year through a combination of state aid and local resources.

The amount that each school district must spend to provide an adequate education to its students is known as the foundation budget. The foundation budget is calculated using a set of assumptions about how much districts should spend per pupil in a number of expenditure categories and for a variety of student groups, assigning higher rates to

<sup>2</sup> The inflation adjustment was made using the Implicit Price Deflator for State and Local Government services published by the Bureau of Economic Analysis. This is the same index that is used to adjust the foundation budget assumptions in the Chapter 70 formula each year.

students whose resource needs are assumed to be greater, such as vocational students, English language learners, and low-income students. These rates are adjusted each year for inflation.

**Figure 4: Chapter 70 aid**  
Actual versus inflation-adjusted (billions of FY07 dollars)



Source: Massachusetts Department of Education

When the Education Reform Act was enacted in 1993, the Commonwealth committed to bring all districts up to their foundation budget spending level within seven years. The economic growth that occurred in the middle and late 1990s meant that the state was able to meet this commitment on time, an achievement that few thought was possible seven years before. New aid was also distributed to districts who were already being funded at or above foundation. Chapter 70 funding increased by \$1.5 billion during this period, with annual rates of growth consistently over 10 percent (see Figure 4). This strong growth continued through fiscal year 2002.

This influx of state aid increased spending overall and directed more resources to less advantaged school districts. Between fiscal years 1994 and 2005 the state's average per pupil spending went from \$5,235 to \$9,096, an increase of 74 percent. In fiscal year 2005 dollars this equaled a 25 percent increase. The push to bring all districts up to foundation benefited low-income districts in particular. In fiscal year 1993, districts with per capita income from the lowest quartile spent about \$1,400 less per pupil than high-income districts. By fiscal year 2000, this gap had narrowed to \$370.<sup>3</sup>

<sup>3</sup> Kenneth Ardon and Robert Costrell (2001). "Fairness in school funding: Reformulating local aid for phase two of education reform." The Commonwealth of Massachusetts Executive Office for Administration and Finance.

When the stock market bubble burst in 2002 state revenues fell dramatically. 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.

Chapter 70 aid grew by 3.3 percent in fiscal year 2006, which was enough to ensure that all districts received some increase in funding, not just those eligible for foundation aid. Funding increased further in fiscal year 2007 as the state began to phase-in a sweeping set of changes to the funding formula that increased state aid by 6.6 percent overall, bringing the total appropriation to \$3.5 billion. Starting in fiscal year 2007 the formula began using communities' property values and residential income to determine the "ideal" mix of state and local funding for schools and is moving rapidly to reach that goal over a five-year period.

Currently, however, in inflation-adjusted terms the amount of Chapter 70 aid that was distributed in fiscal year 2007 was equivalent to the amount allocated in fiscal year 1999, short of the peaks reached in the early 2000s. Moreover, of the 252 districts that saw their state aid reduced in fiscal year 2004, 78 are still scheduled to receive less aid, in nominal terms, in fiscal year 2008 than they did before the fiscal downturn.

Chapter 70 aid is scheduled to increase 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>4</sup>

#### *State reimbursement programs: Circuit Breaker, charter school tuition, transportation, and School Building Assistance*

In addition to Chapter 70, the state funds a number of other line items that provide support for school districts.

The Circuit Breaker program reimburses districts for costs that they incur to educate both in-district and out-of-district special education students. 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 in fiscal year 2004, the Circuit Breaker program has grown from \$94 million to close to \$200 million in fiscal year 2007.

The state also reimburses districts for part of the tuition costs that they pay to send their students to charter schools. After it was not funded in fiscal year 2003, this program grew from \$13 million in fiscal year 2004 to \$68 million in fiscal year 2007.

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<sup>4</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).

Regional school districts are also reimbursed for a portion of the transportation costs that they incur. Funded at \$40 million in fiscal year 2002, the program reached a low of \$26 million in fiscal year 2004 before growing to \$55 million in fiscal year 2007, which covered 90 percent of eligible costs. Municipal districts were eligible for transportation reimbursements up until fiscal year 2004 when funding was eliminated in response to the fiscal downturn. In prior years, municipal districts were receiving around \$50 million in transportation reimbursements, or a quarter of eligible costs.

Finally, significant changes have been made to the School Building Assistance (SBA) program in recent years. In order to deal with a mounting backlog of projects eligible for reimbursement, the state issued bonds to reimburse cities, towns, and regional school districts for the state's share of the building costs within 3 to 4 years instead of the 30-year pay-off that was typical in the past. Going forward, a portion of the state sales tax will be dedicated to school building reimbursements. With this dedicated funding source and a much faster payment schedule the state will save millions of dollars in interest costs.

### *Federal and state grants*

Federal and state grants provide important supplemental resources for school districts, giving them the ability to provide services and programs that they might not otherwise be able to afford. Grants are given out in the form of entitlements to support districts that meet certain eligibility requirements or awarded through competitive processes to districts that are best able to fulfill the funding requirements.

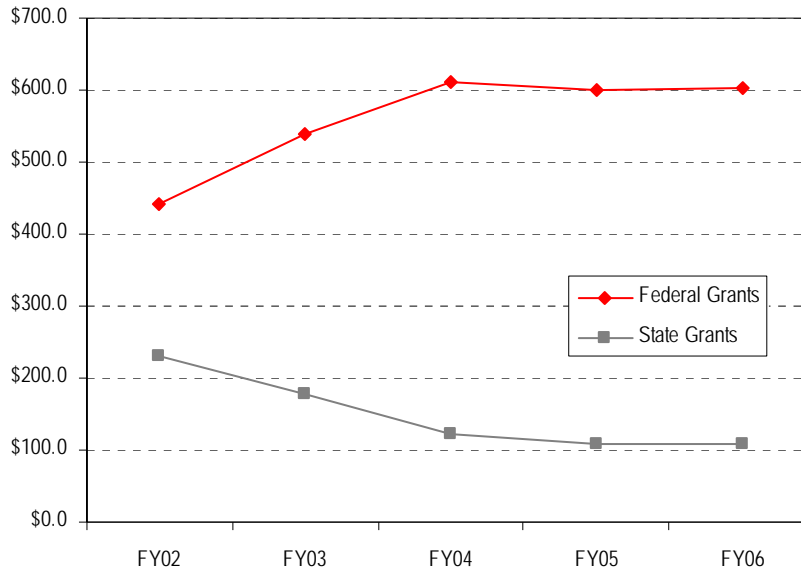
Since fiscal year 2002, the gap between federal and state grant funding has increased substantially (see Figure 5). Federal funding increased as a result of the No Child Left Behind Act (NCLB), while state grants fell in response to weakening fiscal conditions at the state level. In fiscal year 2006, federal grant funds supported \$603 million in district spending and state grant funds supported \$110 million.

Districts saw their federal funding increase by \$163 million, or 37 percent, between fiscal years 2002 and 2006. This change was driven largely by increases in NCLB funds for Title I and Title IIA programs as well as an increase in funding through the Individuals with Disabilities Education Act (IDEA). Meanwhile, state grant funds fell by \$119 million, or 52 percent.<sup>5</sup> State funding fell because class size reduction grants, academic support grants, and smoking cessation grants were eliminated and because funding for community partnership grants for pre-school programs was reduced by \$22 million.

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<sup>5</sup> This figure assumes that grant accounts that were shifted from the Department of Education to the Department of Early Education and Care were level-funded in fiscal year 2006.

**Figure 5: Trends in federal and state grants**  
(millions of dollars)



Source: Massachusetts Department of Education

### *User fees*

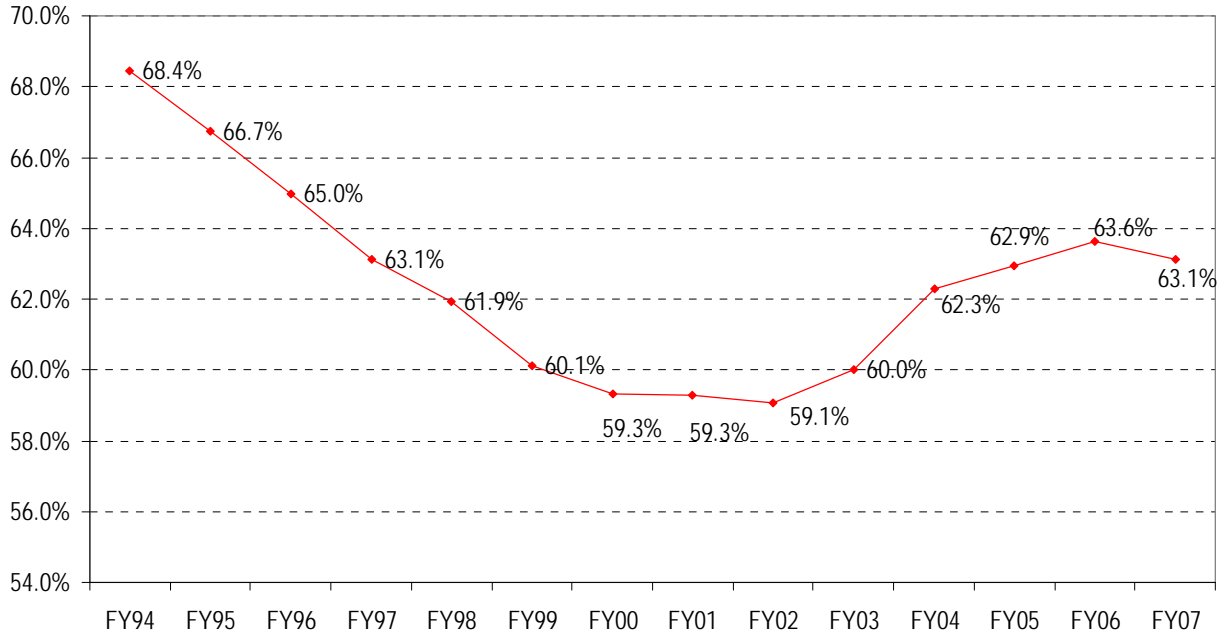
User fees support non-mandated programs such as athletics and transportation services for students who are not eligible for free busing. When the fiscal downturn hit, many districts instituted or increased their fees in order to preserve other programs and services. Between fiscal years 2002 and 2006, district spending on transportation from user fees increased from \$3.2 million to \$11.2 million, while spending from athletic revolving funds, which is largely supported by user fees, increased from \$12 million to \$22.6 million.

### **How revenue trends are affecting district spending patterns**

At least up until fiscal year 2006, years of slow-growing and declining state revenues have meant that school districts and the cities and towns that they serve have shouldered a higher share of the cost of educating their students. When Chapter 70 funds were increasing throughout the 1990s, the percentage of spending coming from local contributions declined (see figure 6). When statewide Chapter 70 funding was growing more slowly or declining between fiscal years 2002 and 2006, the share of local spending increased.

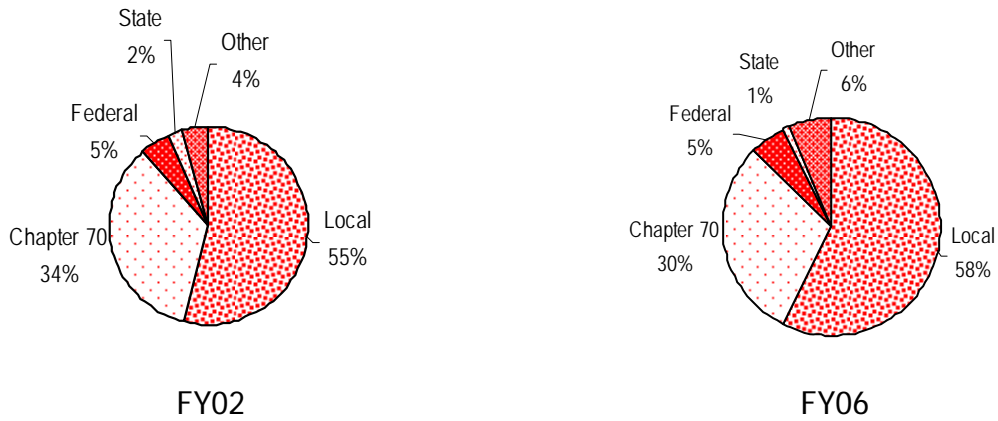
This trend was also apparent in the distribution of funds that support district spending activities. Looking at how the share of spending among district funding sources has changed, the local share of total spending increased by 3 percent between fiscal year 2002 and 2006, while the share of Chapter 70 aid fell from 34 percent to 30 percent (see Figure 7). 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 increases in Circuit Breaker funding for special education students and a greater reliance on user fees to support services like transportation and athletics.

Figure 6: Local spending as a share of district operating costs



Source: Massachusetts Department of Education

Figure 7: District operating expenditures, all funds by source



Source: Massachusetts Department of Education

Note: Figure 7 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.



## Future trends

Coming years are likely to bring continuing challenges for districts on both the expenditure and revenue sides of their budgets.

Rising costs are making it difficult for school districts to come up with sufficient funds to maintain let alone expand existing programs. And while the state's fiscal situation has improved recently and state aid is expected to grow as changes to the funding formula are implemented, some experts predict that state revenue growth will slow in the future unless job growth improves.<sup>6</sup>

At the same time demand is growing to invest more in educational programs such as universal pre-school and expanded learning time in order to ensure that our students can compete in a global economy. If education spending cannot increase quickly enough to support these initiatives, districts and schools will need to find ways to use their existing resources more efficiently.

For instance, Governor Patrick recently signed a new law that will allow cities, towns, and regional school districts to purchase their health insurance from the Group Insurance Commission, which oversees health care plans for state employees. 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>7</sup> Since local governments will need the approval of 70 percent of their collective bargaining units to take advantage of the new law, 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.

This is one possible solution. Others will need to be considered so that districts achieve the fiscal capacity that they need to meet current and future challenges. \*

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<sup>6</sup> "MTF Forecast: Sharp Slowdown in Growth of Tax Revenues."  
<http://www.masstaxpayers.org/data/pdf/bulletins/sharps~1.pdf>

<sup>7</sup> "Municipal Health Reform: Seizing the Moment." <http://www.bmr.org/content/upload/BMRBMTF.pdf>