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|  | Student Opportunity Act Data Advisory Commission Annual Report for 2023 | |
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| **Chapter 132, Section 17 of the Acts of 2019**  A report on the deliberations of the Student Opportunity Act Data Advisory Commission for the 2023 calendar year.  December 2023 | |
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# Introduction

The Department of Elementary and Secondary Education (DESE) respectfully submits this Report to the Board of Elementary and Secondary Education: Student Opportunity Act Data Advisory Commission Annual Report: 2023 pursuant to the statutory requirement in chapter 132 of the acts of 2019:

*Section 17.(a) There shall be a data advisory commission to promote the improved use of state, district and school-level data to inform effective resource allocations at the district and school levels.*

*The data advisory commission shall assist the department in identifying, analyzing and making recommendations on high-impact, cost-effective data strategies for assessing student needs and addressing persistent disparities in achievement, including, but not limited to:*

*(i)  establishing a data collection and reporting system to: (A) track funding allocated for low-income students and students identified as English learners pursuant to chapter 71A and ensure spending is targeted to the intended populations; and (B) allow for access to school-level expenditures and data across all districts to inform the public and policy-makers of high impact, cost-effective school-level interventions and investments;*

*(ii)  strengthening the department’s capacity to analyze and report staffing, scheduling and financial data in ways that support strategic resource allocation decisions at the district and school levels, including a review of national best practice models that ensure greater financial transparency;*

*(iii)  strengthening district capacity to use state, district and school-level data to inform strategic resource allocation and implementation decisions; and*

*(iv)  streamlining data reporting, eliminating duplicative reporting requirements and improving data quality.*

(b)  The data advisory commission shall consist of: the commissioner of elementary and secondary education, who shall serve as chair; the secretary of education, or a designee; 1 member to be appointed by each of the following organizations, all of whom shall have demonstrated knowledge, experience and interest in data collection and analysis for the purpose of improving student performance: the Massachusetts Association of School Committees, Inc.; the Massachusetts Association of School Superintendents, Inc.; the Massachusetts School Administrators Association, Incorporated; the Massachusetts Association of School Business Officials, Inc.; the Massachusetts Association of Vocational Administrators, Inc.; the Massachusetts Association of Regional Schools, Inc.; and the Massachusetts Business Alliance for Education, Inc.; and 4 members to be appointed by the commissioner, 1 of whom shall be a teacher in a district of not less than 15,000 students who has experience in an underperforming or chronically underperforming school that has utilized data to successfully improve student performance, 1 of whom shall be a parent of a student currently enrolled at a kindergarten, elementary school, middle school or junior high school or high school in the commonwealth and 2 of whom shall have professional experience and knowledge in the area of data collection, quality and usage in establishing education policy and improving student outcomes.

*(c)  The data advisory commission shall report annually, not later than December 1, on its progress to the board of elementary and secondary education; provided, however, that the report shall be made publicly available on the department’s website.*

# Data Advisory Commission Membership

* Matthew Deninger, Chief Strategy and Research Officer, Designee of the Commissioner of Elementary and Secondary Education, Chair
* Mark Reilly, Undersecretary of Education, Massachusetts Executive Office of Education (EOE), Designee of the Secretary of Education
* Steve Sharek, Massachusetts Association of Vocational Administrators (MAVA)
* Deborah Boyd, Massachusetts Association of Regional Schools (MARS)
* Joe Esposito, Massachusetts Business Alliance for Education (MBAE)
* Mercy Nunez, Parent, New Bedford Public Schools
* Mary Bourque, Massachusetts Association of School Superintendents (MASS)
* Aldo Petronio, Massachusetts Association of School Business Officials (MASBO)
* Paul Schlichtman, Massachusetts Association of School Committees (MASC)
* Matt Mattos, Massachusetts School Administrators Association (MSAA)

**Data Advisory Commission – 2023 Overview**

The Data Advisory Commission met three times during 2023. Consistent with its legislative charge, the group continued its overview of current ongoing data-related strategies and initiatives at the Department of Elementary and Secondary Education (hereafter “DESE”). As background, the Commission has been working to push forward six focus areas. While not all focus areas are addressed at each meeting, they help ground the Commission and set direction for DESE’s efforts to improve its data systems over time. The focus areas are as follows:

1. *Optimize data collection, specifically regarding districts’ reporting of student information, in coordination with other state agencies, and specific to district use of incremental increases in Chapter 70 funding via the state Student Opportunity Act, in concert with the federal COVID relief funds for districts through ESSER I, II, and III. (§17(a)(i))*
2. *Optimize and align performance indicators, specifically regarding districts’ performance targets per the state Student Opportunity Act, and any federal requirements as part of ESSER I, II, and III to help determine if funding is achieving its intended purpose. (§17(a)(ii))*
3. *Improve data matching to better understand workforce/wage outcomes for students. (§17(a)(iii))*
4. *Strengthen the end-of-the-year financial data collection to improve usability of financial information, through improved coding and enhanced data exports. (§17(a)(i) thru (iv))*
5. *Commission an independent researcher to study whether state funds are targeted to and are reaching intended population of students, whether cost-effective interventions are being implemented, and whether the funds are achieving their intended purpose. (§17(a)(i))*
6. *Support greater use of existing data analytics tools that provide data for all stakeholder groups, including but not limited to families, school personnel, district personnel, and policymakers, and work with all stakeholder groups to improve the availability and usability of state-supported data and data analytics tools. (§17(a)(ii))*

# Data Advisory Commission: 2023 Deliberations

### March 2023

In March, the Commission was presented with updates from two of the six focus areas it established in 2021.

***DESE Charts of Accounts: Alignment in New Grants for Education Management System (GEM$): Focus Areas 1 and 4***

With support of this Commission, DESE has, over the past few years, pushed to adopt an aligned chart of accounts between its grants system and its End of Year Report. The legacy grants system, *EdGrants*, was entirely separate from the End of Year report. This separation of systems made it difficult for districts to translate grant costs onto End of Year Reports, which sometimes led to inconsistencies that took time and effort to resolve.

A great deal of work has gone into developing a new system (the Grants for Education Management System, or GEM$), in which DESE is aligning the grants chart of accounts to mirror the End of Year chart of accounts. This will allow for more specificity for each expenditure, more accurate data, improved financial reporting, and other data-related benefits.

The Commission acknowledged the importance of these improvements, and asked about outreach, training, and other scaffolding efforts to ensure districts and other end-users were notified and prepared for the transition from EdGrants to GEM$. The Commission also pressed DESE to ensure accuracy of the data, especially in the first years of system implementation.

***DESE End of Year Report Data: Focus Area 4***

The Commission reviewed data from the FY22 End of Year report, the first year of SOA spending, and compared it to FY19 data. This exercise allowed the group to gain insight into how overall spending trends have changed since the infusion of funds came from both the Student Opportunity Act and the federal COVID relief funds (ESSER I, II, and III). A few of the highlights from the presentation:

* Chapter 70 funding was distributed more heavily to higher poverty groups, as SOA intended. Growth in overall spending was covered by the increase in Chapter 70 funding in higher poverty districts, but for lower poverty districts, local funds largely covered that increase.
* Teachers earned about $6,000 per pupil in FY19, and about $7,000 per pupil in FY22. As a general trend, spending on teachers grew more in lower poverty districts than in the highest poverty districts. An exception, however, was that teachers in districts that are between 70-80% poverty saw the largest per pupil earnings increases over that time period.
* As of the end of FY22, it is difficult to determine from the overall End of Year Report alone the impact of SOA, by itself, because of factors like the pandemic, ESSER funding, high inflation, and collective bargaining, which all affected spending.

The Commission thought it important to look more closely at individual district level data to understand how SOA increases are affecting spending. The Commission is looking to district survey information as well as both internal and independent research efforts that will allow us to see how additional state resources are helping fund individual district strategies.

### September 2023

In September, the Commission was presented with updates from two of the six focus areas.

***Student Opportunity Act – End of First 3-year Cycle: Focus Areas 1 and 2***

The Commission was updated on the SOA planning process. Districts submitted initial 3-year plans to DESE in January 2021, followed by a comprehensive amendment in April 2022 due to the large infusion of federal pandemic relief funds and the postponement of the SOA funding rollout in 2021. Districts submitted progress updates in April 2023.

With a new SOA cycle beginning, districts’ 3-year SOA plans will be due in April 2024. DESE has been developing thorough guidance and an improved process for this next round of district plans. The Commission was asked to give feedback on the draft process, which would entail: strong data analysis (disaggregated by student group, which will be facilitated by a new DESE-generated gap-closing data resource), a better balance between narrative and quantitative data, improved written guidance from DESE, target setting for districts, a 3-year arc of plans (less annually based), alignment with DESE’s Educational Vision, and submission of plans through the new GEM$ system.

The Commission deliberated on whether the target indicators were missing anything. Members called attention to growth metrics, in particular, as being essential to include, along with ACCESS indicators for districts with large EL populations. They also discussed the administrative burden the planning process places on districts, and their capacity to draft and submit their plans.

Given the significant changes in DESE guidance proposed in this second round of SOA district plans, the Commission was asked for any additional comments before the guidance was finalized.

***ESSER Spending Update: Focus Area 1***

The Commission was briefed on the latest ESSER spending data. At this point, the Commonwealth’s districts were two thirds of the way through the ESSER II+III time period, and 50% of funds had been claimed. Most of funds unclaimed were concentrated in 25-30 districts; DESE has kept in close touch with these districts to check on spending and offer support. The federal grants team at DESE, by and large, continues to hear positive reports from districts about ESSER spending plans.

The discussion also included information on late liquidation for ESSER II. Late liquidation is available only on an expense-by-expense basis and will enable districts to extend unclaimed funds beyond September 30, 2023. DESE anticipates more districts will use this process for ESSER III than ESSER II.

The Commission asked to see breakdowns of spending by category at the next meeting.

### December 2023

In December, the Commission concentrated on four focus areas (1, 2, 5, and 6). Topics on the agenda were a follow-up discussion of the SOA Student Outcome Comparison Tool, a follow-up presentation on ESSER spending categories, and a preliminary discussion of a future spending study.

***Student Opportunity Act – Student Outcome Comparison Tool: Focus Areas 1, 2, and 6***

The Commission received a demonstration of the SOA Student Outcome Comparison Tool, which is designed to better disaggregate data for student groups, and to make the data more accessible. The tool is intended to start conversations in districts around areas of strength and areas for improvement. The tool uses DESE data that align to DESE’s Strategic Objectives and Educational Vision, and it incorporates the Commission’s recommendations from the September meeting to inform new indicators, such as growth.

The Commission discussed the many uses of this tool, the timeframe and process by which it will be rolled out, and whether it could be used in an evaluative manner to assess districts’ progress over the past few years.

***ESSER II Spending Update by Category: Focus Area 1***

For the presentation on ESSER spending by category, DESE presented the latest available ESSER II spending data. The Commission learned that:

* While ESSER I funds were spent more on immediate pandemic-related needs (COVID supplies, laptops/chromebooks, etc.), ESSER II spending shifted dramatically to concentrate on mitigating learning loss.
* Most spending in FY22 was on salaries and benefits, followed by supplies, and then contracted services.

The Commission discussed the end-of-FY24 fiscal cliff, when ESSER III money expires, and what DESE can do to help prepare districts for that eventuality. It was noted that there will be a range: some districts will not experience a cliff at all, whereas others may experience a steep drop in funds. It was also noted that areas of need were made evident by the pandemic, which districts are trying to sustain.

***Spending Study: Focus Area 5***

Now that the Commonwealth is almost midway into the SOA rollout, and close to the end of federal ESSER funding, the Commission believes it is a good time to start putting together a plan for an independent research study. DESE reviewed with the Commission what the procurement process would look like for such a research study and asked Commission members interested in advising on procurement to participate.

The Commission discussed the main purpose of the study, which is to learn from an expert as to how school districts in Massachusetts treated two influxes of money (from SOA and ESSER), who benefitted, and what were some of the outcomes. The Commission also discussed how the independence of an objective researcher helps lend credibility to research findings, and that it will enable us all to learn about things that DESE does not have broad capacity to research as part of its day-to-day operations.