

MASSACHUSETTS

K-12

EDUCATION
POLICY PRIMER

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INTRODUCTION

“Wisdom and knowledge, as well as virtue, diffused generally among the body of the people, being necessary for the preservation of their rights and liberties, [...] it shall be the duty of legislatures and magistrates, in all future periods of this commonwealth, to cherish the interests of literature and the sciences, and all seminaries of them.” - Massachusetts Constitution, 1780

Over the past three decades, Massachusetts has emerged as the country’s leader in K-12 public education. Since the Education Reform Act of 1993 and the Achievement Gap Act of 2010, Massachusetts has seen significant advances across demographic groups. The November 2019 Student Opportunity Act expanded on this legacy by committing \$1.6 billion to districts over seven years and attaching accountability measures to ensure the funding yields results for students. Aided by these landmark pieces of legislation, Massachusetts has seen laudable success by the benchmark of overall achievement.

At the same time, the Commonwealth has struggled to achieve the goal of equity. While gains have occurred across demographic groups, opportunity and achievement gaps remain wide and persistent. For many students, especially students of color, students from low-income communities, and students whose first language is not English, Massachusetts’s first-in-the-nation status hides a reality of unacceptable educational outcomes in their communities. As the Massachusetts Education Equity Partnership put it in its 2018 report, the Commonwealth is “[Number One for Some](#).” Much work remains to achieve high-quality education for all students.

The aim of this document is to provide tools, information, and research to that end. For many who want to understand and impact K-12 education, the landscape can appear overwhelming, demanding a grasp of factors including: the various roles of federal, state, and local governments; changing student demographics and needs; and politically charged topics. By providing a structured overview of who does what, along with some research on what works, we hope to help readers improve their understanding while providing opportunities for further learning and inquiry.

The focus of this policy primer is K-12 education policy. Within that domain, its scope is wide, including research on topics as diverse as education funding methods, assessment practices, special education, and teacher preparation. On each of these topics, we have distilled the current state of research, with links to individual studies so that interested readers can dive further. Several topics outside the scope of this document—such as early education, higher education, out-of-school enrichment, and broader economic equality measures—are crucial alongside K-12 policy in closing achievement gaps and advancing educational equity. Our hope is that this document will serve as a resource and launching pad for well-informed decisions that will improve education for all Massachusetts students, especially those who have been underserved too often.

HISTORY

SECTION 1

HISTORY OF EDUCATION POLICY IN MASSACHUSETTS

Today, Massachusetts is well-known as a national vanguard in public education. The Commonwealth boasts the country's first public school; the earliest law making public education guaranteed and compulsory; and a pioneering record in ensuring high standards and state accountability. John Adams famously enshrined the right to public education in Massachusetts' Constitution, the oldest written constitution still on the books. Horace Mann, the father of public schooling in the United States, was born in Massachusetts and became the Commonwealth's first secretary of education. From these auspicious beginnings, Massachusetts has risen to become the country's recognized leader in public education.


Nonetheless, it has taken Massachusetts centuries to make good on Adams' exhortation to "cherish" public schools. Today, the Commonwealth suffers from large achievement gaps, and too many students are left behind—especially students of color, students from low-income backgrounds, students with disabilities, and students whose first language is not English. As Massachusetts looks to the future of education policy, its leaders need to provide the funding identified by the Student Opportunity Act while also aggressively addressing these gaps and extending the Commonwealth's excellence in education to all its students.

TIMELINE

- **1635** Boston Latin School is **founded** as America's first public school.
- **1642** Massachusetts Bay Colony **passes** the first law in the Americas requiring children to be educated — though not all children are included.
- **1647** Massachusetts Bay Colony **requires** all towns with 50 or more families to establish a public elementary school. Towns with 100 or more families are required to establish a Latin (secondary) school.
- **1780** The Massachusetts Constitution, drafted by John Adams, **enjoins** the Commonwealth “to cherish the interests of literature and the sciences, and all seminaries of them; especially the university at Cambridge [and] public schools and grammar schools in the towns.” This language remains in force to this day.
- **1837** Massachusetts Board of Education is founded (today: Board of Elementary and Secondary Education). Horace Mann is the state's first education secretary.
- **1839** Massachusetts' first professional school for the education of teachers is established.
- **1852** Massachusetts becomes first state to make education compulsory for students aged 8-14 years.
- **1909** Commissioner of Education (today: Commissioner of Elementary and Secondary Education) is established.
- **1954** The U. S. Supreme Court decides *Brown v. Board of Education of Topeka*, ruling that “separate educational facilities are inherently unequal” and thereby barring discrimination by race in public education.
- **1965** Congress passes and President Lyndon B. Johnson signs the Elementary and Secondary Education Act, establishing federal funding and accountability measures in public education.

Massachusetts legislature **passes** the Racial Imbalance Act, requiring the desegregation of the Commonwealth's schools.
- **1966** Beginning of METCO (Metropolitan Council for Educational Opportunity), a voluntary desegregation program in which suburban towns enroll students from Boston (and later Springfield).
- **1974** The U. S. Supreme Court rules in *Milliken v. Bradley* that busing for the purpose of desegregation cannot be required across district boundaries. Nor can district boundaries be redrawn by court order for the purpose of desegregation.

With his ruling in *Morgan v. Hennigan*, Judge Arthur Garrity **initiates** school desegregation by busing in Boston.

- 
- 1988** Court-controlled busing [ends](#) in Boston.
- 1991** Massachusetts Business Alliance for Education releases [Every Child a Winner](#), proposing a reform plan of high standards, accountability, and progressive education funding.
- 1993** In [McDuffy v. Secretary of the Executive Office of Education](#), the Massachusetts Supreme Judicial Court rules that Massachusetts' educational inequities are unconstitutional, and that the Commonwealth must enact a plan to address them. This decision followed years of lawsuits dealing with inequitable education in Massachusetts, dating to [Webby v. Dukakis](#) in 1983. After several years of work, the legislature passes the [1993 Education Reform Act](#), establishing the chapter 70 formula to provide state aid to school districts as well as high standards, test-based accountability to those standards, and public school choice through charter schools. Through chapter 70, the state allocated \$1.3 billion to districts in 1993, and has allocated \$89 billion through 2019.
- 2003** Massachusetts becomes the #1 state in the country for academic achievement, with the highest average scores on the National Assessment of Education Progress (NAEP) in 4th grade math, 4th grade reading, 8th grade math, and 8th grade reading. The state leaped from 12th place in 8th grade math in 2000 and 5th place in 4th grade reading in 1998.
- 2005** In [Hancock v. Commissioner of Education](#), the Massachusetts Supreme Judicial Court rules against students in 19 school districts who challenged the state's foundation budget formula as inadequate. The court finds that the legislature's consistent increase in funding and the state's measurable progress toward adequate education for all students constituted fulfillment of its constitutional duty.
- 2010** Legislature passes [An Act Relative to the Achievement Gap](#), bringing additional funding to districts through the Obama administration's "Race to the Top" competitive grant program in exchange for additional reforms, including a charter school cap lift, strengthened accountability, in-district autonomous schools called Innovation schools, and the introduction of school district receivership in its current form as part of the state's accountability system.
- 2011** Lawrence Public Schools becomes the first district to come under state receivership under the 2010 Act Relative to the Achievement Gap. Holyoke Public Schools goes into receivership in 2015, and Southbridge Public Schools follows in 2016.
- 2019** Massachusetts legislature passes the [Student Opportunity Act](#), acting on the recommendations of the Foundation Budget Review Commission, which found that the state's school funding formula should be updated to reflect the cost of healthcare and special education as well as the higher costs of educating English learners and students from low-income backgrounds. In addition to funding, the law includes measures to encourage planning, accountability, and innovation.

GOVERNANCE

SECTION 2

GOVERNANCE

OVERVIEW

Local governments, the state, and the federal government all play roles in governing and funding school districts. Most educational decisions in Massachusetts are made at the local level, with accountability measures, funding, and civil rights protections coming from the state and federal governments.

All three levels of government fund public schools. The federal portion of funding tends to be much smaller (statewide, about 4.3% in 2017, the most recent data available from the U.S. Census Bureau) than the combined state and local funding. Districts with higher levels of need tend to derive a greater share of their funding from the state and federal governments than districts with a larger tax base and/or more affluent population.

LOCAL GOVERNANCE

In Massachusetts, most traditional public schools are governed at the local level with varying degrees of state and federal oversight. Most traditional public school districts are coterminous with a single municipality, while some are regional school districts, created when residents of multiple towns decide to educate their students jointly.

For most districts, [governance](#) is divided between a **school committee** and a **superintendent**. Broadly, the school committee “establishes educational goals and policies for the schools in the district,” acts as the “‘employer’ for collective bargaining purposes,” and chooses the superintendent. The school committee is also required to fulfill state and federal mandates. A school district’s budget is under the school committee’s purview.

The superintendent, in turn, is responsible for managing the day-to-day operations of the district, including hiring and firing of principals, teachers, and other district employees. School committee members are elected by the voters of the cities or towns encompassed by the district, with the single exception of Boston, where the mayor appoints them.

At the individual school level, state law [stipulates](#) that each school establish a school site council, which reviews the school budget, helps to develop school improvement plans, and takes on additional roles as granted by the local school committee. Members may include

parents, guardians, teachers, and other stakeholders. At least half of the council must belong to the school community (meaning parents, teachers, students, and staff), parents must have parity with teachers, and the council should reflect the diversity of the school building and community.

One area of local governance is curriculum. Standards, or educational goals outlining what all Massachusetts students should know by completion of a given grade level, are set by the state. Districts, however, are responsible for choosing *curriculum*—meaning the lesson plans, topics of instruction, books, materials, and other resources used in the classroom. Decisions pertaining to these issues are governed at the local level; the state does not dictate curricular choices. The choice of which historical events to cover in class or which textbooks to use, for instance, are local matters.

STATE ROLE

The state government supports local governments by providing monetary aid, educational standards, accountability, and in some cases operational support.

The state legislature is empowered to make law on education policy, provided that state law must be consistent with the federal Every Student Succeeds Act and other binding federal laws. K-12 education policy laws are considered by the legislature's Joint Committee on Education, which chooses whether to report legislation favorably for consideration by the whole legislature. The Joint Committee on Education is additionally charged with considering bills on early education, while higher education bills are considered by the separate Joint Committee on Higher Education. The state budget, which determines the level of education funding to districts and programs, is developed in a months-long process involving the Governor, House of Representatives, and Senate.

The Education Reform Act of 1993 established the Commonwealth's current approach to public education. That law created a program of progressive state aid to districts alongside standards and accountability, including statewide standardized testing in the form of the Massachusetts Comprehensive Assessment System (MCAS), to ensure that all schools and districts provide their students with an adequate education. Subsequent updates, most notably in 2010 and 2019, have expanded both the amount of money disbursed to districts and the powers conferred to the Department of Elementary and Secondary Education to support districts in narrowing achievement gaps.

The Commonwealth's state-level K-12 education policy is overseen by the Board of Elementary and Secondary Education, which approves standards, votes on charter school applications and renewals, decides when to approve state intervention in local districts, and hires the Commissioner of Elementary and Secondary Education.

The [Board of Elementary and Secondary Education \(BESE\)](#) has 11 members. One is the elected chair of the Massachusetts Student Advisory Council, an elected body representing students in all Massachusetts public schools. Another is the Secretary of Education, who is a member of the Governor’s cabinet. The governor appoints the remaining 9 members; one of the 9 may be appointed to a term coterminous with the governor’s tenure, while the other 8 are appointed to 5-year terms.

MEMBER(S)	TERM	SELECTION
Secretary of Education	At will of governor	Cabinet-level government official; serves on BESE ex officio
Chair of the Student Advisory Council	Elected annually	Elected by Student Advisory Council
Labor representative	5 years*	Chosen by the governor from a list of three candidates provided by the State Labor Council, AFL-CIO
Business/Industry Representative	5 years*	Chosen by the governor, must be the representative of a business or industry
Parent representative	5 years*	Chosen by the governor from a list of three candidates provided by the Massachusetts Parent Teacher Association
Six additional members	5 years*	Freely appointed by the governor

**Unless this is the one member chosen by the governor for a term coterminous with the governor’s tenure*

The Commissioner of Elementary and Secondary Education attends Board meetings but is not a voting member.

The Secretary of Education, who is the governor’s chief advisor on K-12 education, early education, and higher education, also leads the Executive Office of Education (EOE), a cabinet-level agency that collects and analyzes data from schools and districts, manages state education budget proposals, and may provide human resources assistance to districts or DESE. The Secretary must approve the Board’s choice of Commissioner of Elementary and Secondary Education.

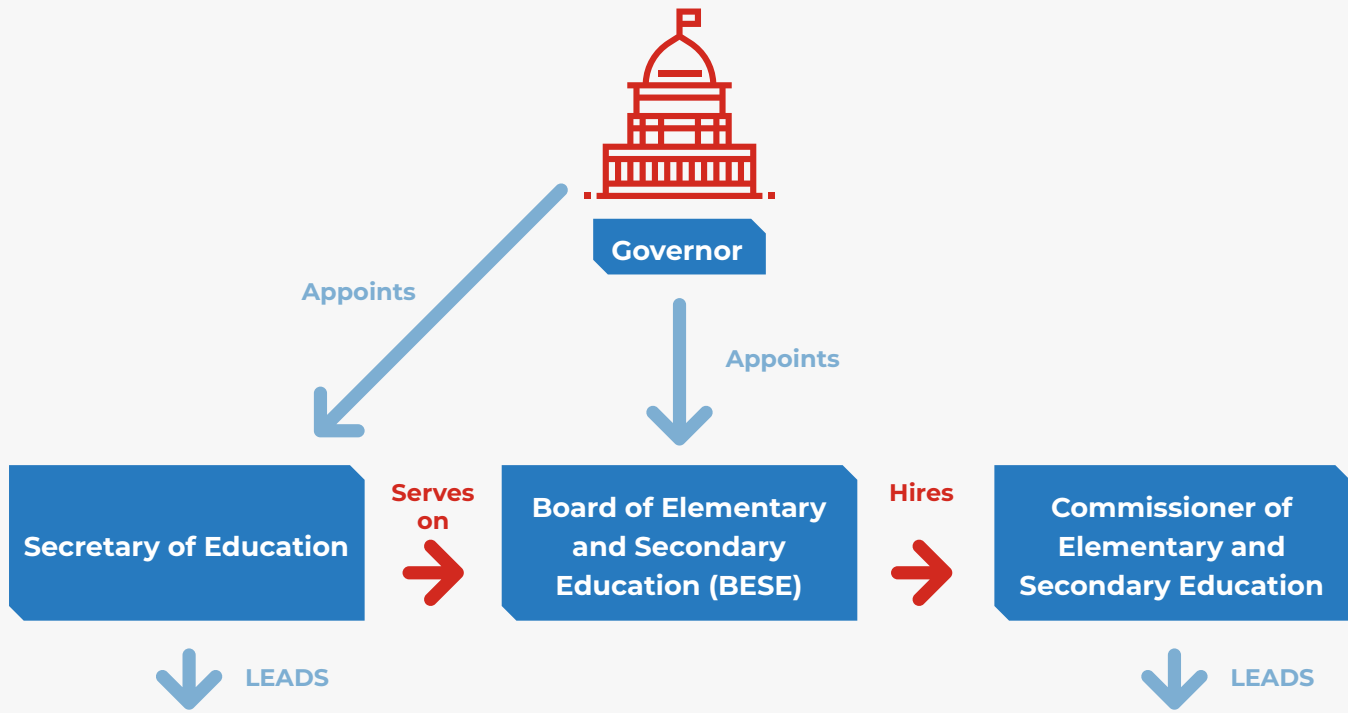
The Commissioner of Elementary and Secondary Education, in turn, leads the [Department of Elementary and Secondary Education \(DESE\)](#), which implements policy and supports districts. DESE is also responsible for ensuring that Massachusetts complies with the federal Every Student Succeeds Act (ESSA). With regards to fulfilling its requirements under ESSA, Massachusetts has placed focus for 2017-2022 on three main areas: strengthening the quality and breadth of curriculum, early grade literacy and middle grade mathematics achievement, and additional pathways to success following high school graduation. To do this, DESE has developed five [strategies](#) to focus its efforts: Strengthen standards, promote educator development, support social-emotional learning, turn around the lowest performing districts, and use technology and data to support student learning.

DESE also recommends a program of study called [MassCore](#) to districts, designed to lead to college and career readiness.

Additionally, the Department of Early Education and Care oversees state-level pre-K education policy and out-of-school-time programs, while the Department of Higher Education oversees higher education policy. Each of these departments has its own commissioner and board.

The Student Opportunity Act (SOA) of 2019 provides an opportunity for closer partnership between K-12 schools, which fall under the purview of the Department of Elementary and Secondary Education, and early education providers, which fall under the Department of Early Education and Care. That opportunity comes as Jeff Riley, Commissioner of Elementary and Secondary Education, [encourages](#) districts to use SOA money to partner with private early education providers to provide free pre-K to district students. This model allows districts to braid chapter 70 dollars with private funding streams in order to serve more pre-K students. Holyoke has pursued a similar model using funding from a separate state grant: in a year round [program](#), the Valley Opportunity Council manages pre-K classrooms in Holyoke school buildings, free of charge to parents.

A high-level diagram of the roles of different government bodies in K-12 education policy is below.



Executive Office of Education

- Cabinet-level executive agency dealing with K-12, early education, and higher education
- The Secretary must approve BESE's choice of Commissioner
- Reviews and approves mission statements and 5-year plans for the state's K-12, early education, and higher education systems
- Manage budget proposals, conduct data collection, and provide human resources assistance

- Hires Commissioner of Elementary and Secondary Education
- Approves academic standards
- Chooses when to intervene in low-performing school districts, including receivership, at the suggestion of the Commissioner




Department of Education

- Executes education law passed by the legislation and regulations passed by BESE, including disbursement of chapter 70 funds, implementation of the state's accountability system, and assistance to districts in turnaround
- The Commissioner appoints receivers in receivership districts
- Provides data on schools and districts to the public
- Monitors schools and districts to ensure students receive adequate

FEDERAL ROLE

The federal government plays a smaller role in K-12 education policy than either localities or the state, but it has played a significant role in both funding and policy since Congress passed the Elementary and Secondary Education Act in 1965. This law has been reauthorized under several different names, the most recent being the Every Student Succeeds Act (ESSA) of 2015. The agency responsible for implementing federal education policy is the Department of Education (DOE), a cabinet-level agency created in 1979.

Under ESSA, DOE plays roles in both **funding** public schools and **regulating** state education policy.

-  **DIRECT FUNDING:** The two largest federal funding [programs](#) for public schools are Title I, which directs about \$15 billion annually to schools with large populations of students from low-income backgrounds, and the Individuals with Disabilities Education Act (IDEA), which provides about \$12 billion annually in special education grants to states. In both cases, the funding flows directly from DOE to states, which then distribute the funding to schools or districts. There are also smaller federal funding programs targeting various subgroups and programs, which can be found in DOE's [budget](#).
-  **REGULATION & CIVIL RIGHTS PROTECTION:** Under ESSA, the federal DOE also plays an oversight and regulatory role. ESSA [requires](#) states to establish high academic standards; conduct standardized assessments based on these standards; share information about these assessments and their results with families, students, and communities; and create accountability and support systems to help underperforming schools, schools with low-performing subgroups, and schools with low graduation rates. Beyond ESSA, DOE can also issue guidance and regulations aimed at protecting students' civil rights, as well as parent rights. It enforces the Individuals with Disabilities Education Act (IDEA), which guarantees that students with disabilities receive an adequate public education tailored to their needs. As with all federal agencies, DOE may repeal its own guidelines and regulations. The Obama administration, for example, issued guidelines aimed at diminishing racial disparities in school discipline, which the Trump administration later rescinded.
-  **COMPETITIVE GRANT PROGRAMS:** While the federal DOE has limited authority to mandate policy change in the states, it has used competitive grant programs as a means of encouraging favored policies. Rather than requiring states to adopt a particular policy, these programs incentivize the optional change. An example is the Obama administration's [Race to the Top program](#), which awarded over \$4 billion to states for proposals including increased charter school seats, state interventions in struggling schools and districts, and increased use of data in making education decisions.

PARENT/GUARDIAN RIGHTS

Parents and guardians have a number of rights and powers under Massachusetts law. Most fundamentally, parents have an ultimate right to choose their children's educational pathway, though their school choices are generally constrained by geographic boundaries established by their local district. Parents may choose among options including the traditional public school system, public charter schools, regional schools, alternative education models, private schools, and homeschooling. If they choose the traditional public schools, they generally must send their children to schools to which they are zoned, though the state's school choice program (discussed in its own section below) allows some students to attend traditional public schools in districts other than the one in which they live.

Some parent rights are uniform across the Commonwealth, like parents' rights to require alterations in a child's Individualized Education Program. Other rights, such as when parents may enter school buildings, vary by district.

Parent involvement in educational decision-making and practice has [documented benefits](#) for students, but barriers to access mean that white, middle- and upper-income parents are most likely to be engaged. A 2010 study [found](#) that perceived barriers of resources were less influential to a parent's decision to become more involved than the extent to which a parent felt welcomed and invited by their child's school or teacher.

At the state level, the [Parent and Community Education and Involvement Advisory Council](#) advises the Commissioner of Elementary and Secondary Education and the Board of Elementary and Secondary Education on parent/guardian outreach and involvement. Furthermore, as noted above, at least one member of the Board of Elementary and Secondary Education must serve as a parent representative, chosen from a list provided to the governor by the Massachusetts Parent Teacher Association.

The 2019 Student Opportunity Act added another component of parent/guardian involvement. Along with the law's provision that districts must present three-year spending plans to the Department of Elementary and Secondary Education, districts [must collect](#) "input and recommendations from parents and other relevant community stakeholders" in crafting these plans.

APPENDIX: CURRENT OFFICE HOLDERS

As of July 2020, the offices described above are held by the following individuals.

EXECUTIVE OFFICERS

GOVERNOR	Charles D. Baker (R)
SECRETARY OF EDUCATION	James Peyser
COMMISSIONER OF ELEMENTARY AND SECONDARY EDUCATION	Jeffrey C. Riley

LEGISLATIVE OFFICERS

SPEAKER OF THE HOUSE	Robert DeLeo (D-Winthrop)
PRESIDENT OF THE SENATE	Karen Spilka (D-Ashland)
MEMBERS OF THE JOINT COMMITTEE ON EDUCATION	Sen. Jason Lewis (D-Winchester), <i>chair</i> Rep. Alice Peisch (D-Wellesley), <i>chair</i> Sen. Joan Lovely (D-Salem), <i>vice chair</i> Rep. Paul Tucker (D-Salem), <i>vice chair</i> Sen. Sal DiDomenico (D-Everett) Sen. Adam Hinds (D-Pittsfield) Sen. Julian Cyr (D-Truro) Sen. Patrick O'Connor (R-Weymouth) Rep. Thomas Walsh (D-Peabody) Rep. Jonathan Zlotnik (D-Gardner) Rep. Chynah Tyler (D-Boston) Rep. Bud Williams (D-Springfield) Rep. Andres Vargas (D-Haverhill) Rep. Daniel Carey (D-Easthampton) Rep. Richard Haggerty (D-Woburn) Rep. Kimberly Ferguson (R-Holden) Rep. James Kelcourse (R-Amesbury)

BOARD OF EDUCATION

POSITION	NAME	TERM ENDS
SECRETARY OF EDUCATION	James Peyser	At will of governor
CHAIR OF STUDENT ADVISORY COUNCIL	VACANT	Elected annually
LABOR REPRESENTATIVE	VACANT	
BUSINESS/INDUSTRY REPRESENTATIVE	Katherine Craven, <i>chair</i> . Chief Administrative Officer, Babson College	2024
PARENT REPRESENTATIVE	Mary Ann Stewart. MA Parent Teacher Association board member	2024
FREELY-APPOINTED MEMBERS (6)	James Morton. President & CEO, YMCA of Greater Boston	2023
	Amanda Fernández. CEO & co-founder, Latinos for Education	2022
	Matt Hills. Former chair, Newton School Committee	2024
	Michael Moriarty. Executive director, OneHolyoke Community Development Corporation	2020
	Paymon Rouhanifard. CEO & co-founder, Propel America; former superintendent, Camden (NJ) City School District	2024
	Martin West. Professor of education at the Harvard Graduate School of Education, faculty research fellow at the National Bureau of Economic Research, and editor-in-chief of Education Next	2022

FINANCE AND ACCOUNTABILITY

SECTION 3

SCHOOL FINANCE

OVERVIEW

As outlined above, Massachusetts school districts receive funding from the local, state, and federal governments. Each district chooses how to apportion funding to its schools.

The federal government tends to provide a relatively small proportion of funding to each district, with the state and local governments providing the majority. In most districts, local property taxes constitute the bulk of school funding; in districts with smaller property tax bases or greater levels of need, the state may provide the largest share of funding. Most state funding to districts comes through the chapter 70 formula, outlined below. Other sources of state funding to districts include, but are not limited to, circuit breaker funding for special education (discussed below); grants for districts to implement specific programs, such as the social/emotional learning grants discussed below; transitional aid to districts when students leave to attend charter schools; and Massachusetts School Building Authority funding (discussed below).

School finance in Massachusetts is governed by the principle, inscribed in the state constitution, that each student is entitled to an adequate education. In 1993, the state's Supreme Judicial Court ruled in *McDuffy v. Secretary of the Executive Office of Education* that this constitutional provision imparts on the state government a duty to ensure sufficient district spending on public education. Each district must craft a budget that fulfills this requirement, and the state must commit to aiding districts when they cannot provide sufficient funding on their own.

NATIONAL CONTEXT

In *San Antonio Independent School District v. Rodriguez* (1973), the U.S. Supreme Court ruled that there is no federal Constitutional right to equal educational opportunity. In the *Serrano* cases, especially *Serrano II* (1976), the California Supreme Court held that the California Constitution protects students' right to education despite *San Antonio's* rejection of a similar protection in the U.S. Constitution. The Kentucky Supreme Court ruled in *Rose v. Council for Better Education* that Kentucky's constitutional protections for quality education required equitable funding and state-level measures to ensure equity. In the *Abbott* decisions, notably *Abbott IV* (1997) and *Abbott V* (1998), the New Jersey Supreme Court held that the state constitution's protection for "thorough and efficient education" required alterations to the state's funding formula and rigorous intervention in many districts.

Massachusetts' school finance system is progressive, meaning that it directs more money to high-need districts than districts of lower need. Not all states have similar systems, nor do all state constitutions require adequate public education for all students and concomitant funding.

Some states, like Alabama, distribute state funding *solely* based on the number of students in a given district. Others, like Maine, have no constitutional requirement for state funding to districts of high need, but nonetheless have established such systems through legislation.

MORE INFORMATION

For more on school finance and its history in Massachusetts:

- "Chapter 70 Program." Massachusetts Department of Elementary and Secondary Education. [Website](#).
- "The State Constitutional Mandate for Education: The McDuffy and Hancock Decisions." [Massachusetts Department of Elementary and Secondary Education](#)" Massachusetts Department of Elementary and Secondary Education.
- "School Funding Reality: A Bargain Not Kept." Massachusetts Business Alliance for Education, 2010.

For more on school funding in each state constitution:

- "50-State Review: Constitutional obligations for public education." Education Commission of the states. March 2016.

For more on finance reforms and their impact on the achievement gap:

- Lafortune, Julien, Jesse Rothstein, & Diane Whitmore Schanzenbach. "School Finance Reform and the Distribution of Student Achievement." National Bureau of Economic Research. 2016.

CHAPTER 70 FORMULA

OVERVIEW

In Massachusetts, the “chapter 70 formula” is the mechanism by which the state calculates state education aid to districts. It is named for its statutory location in the Massachusetts General Laws. The chapter 70 formula was established in the 1993 Education Reform Act and updated through the 2019 Student Opportunity Act. The formula is designed to provide greater amounts of funding to districts with higher levels of need, but *all* districts receive some state funding. Since 1993, the state has provided \$89 billion to districts through the chapter 70 formula.

HOW IT WORKS

The chapter 70 formula operates under the requirements that districts spend enough per student to provide an adequate education, and that the state help districts to do so where the district cannot afford the requisite budget on its own.

The state determines the amount of aid each district will receive in a given year using the following process:

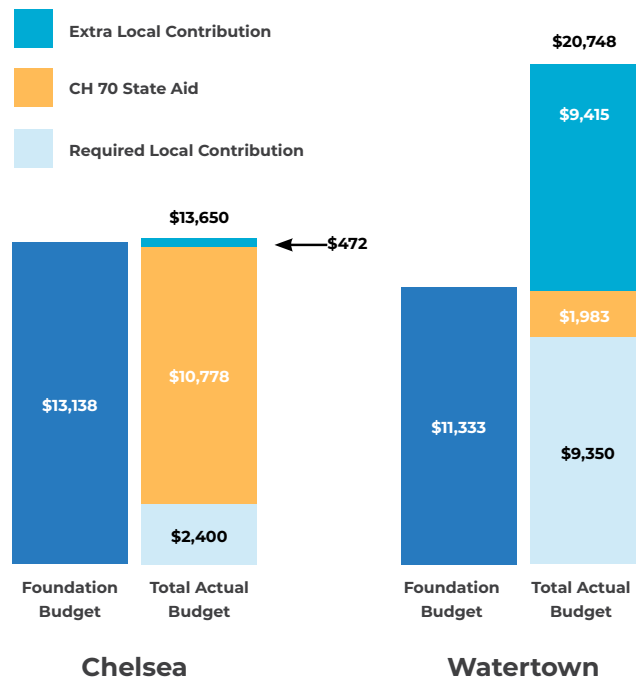
1. The state calculates the amount of money a district would have to spend in order to provide an adequate education to its students; this is called the **Foundation Budget**. It is rendered by multiplying the district’s number of students in each grade and demographic category (i.e. students with disabilities or English learners) by multipliers specific to that demographic group, and then by dollar amounts in various functional categories (like operations and maintenance).
 - a. The 2019 Student Opportunity Act updated the chapter 70 formula by increasing the assumed cost of healthcare and of educating students with disabilities, English learners, and students from low-income backgrounds to reflect actual increased costs since 1993.
2. The state determines how much of the Foundation Budget a given district can pay based on the municipality’s aggregate property values and aggregate personal income. This, the **Local Contribution**, constitutes a greater proportion of the Foundation Budget in high-income communities than in low-income communities.

3. The state provides **chapter 70 aid** to districts in order to make up the difference between the Local Contribution and the Foundation Budget.
 - a. That being said, there is a minimum amount of chapter 70 aid: all districts must receive at least 17.5% of their Foundation Budget in state aid.
4. Districts are also free to spend *above* the Foundation Budget. Even when districts spend more than their total foundation budget, they still receive the 17.5% minimum aid from the state.

The following graphic from the Massachusetts Budget and Policy Center demonstrates how the chapter 70 formula applies to two districts, Watertown and Chelsea:

Chapter 70 Funding for Two Sample Districts

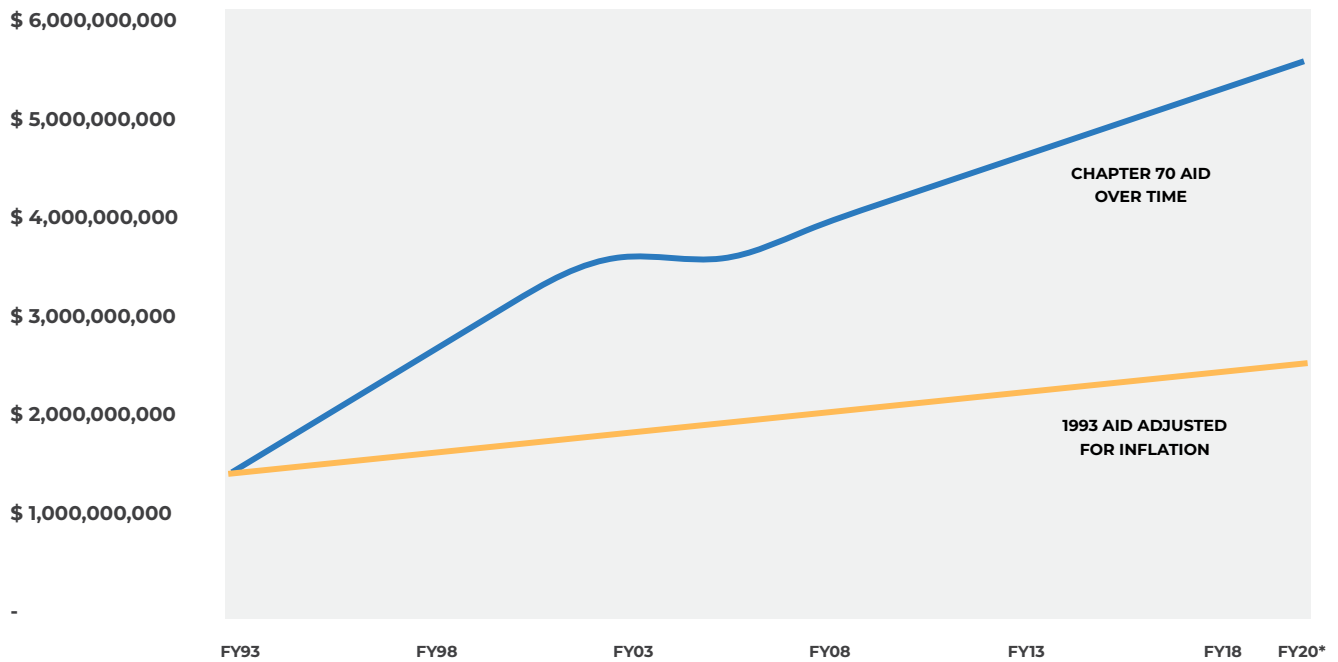
Per pupil spending by revenue source, Fiscal Year 2019



Charter schools also receive funding through the chapter 70 program, with funding associated with a given student flowing from the student’s sending district to his/her charter school. This funding mechanism is consistent with the state’s general principle that funding is based on, and follows, students, not districts. For a more in-depth discussion of charter schools and charter school finance, please see the “charter public schools” section below.

The state disbursed over \$4.9 billion in chapter 70 funds to school districts in FY19. Since 2008, chapter 70 aid has increased 300% as compared to 78.4% cumulative inflation over the same period.

Chapter 70 Funding Over Time, Compared To Inflation



Note: The asterisk on FY20 denotes that this figure is budgeted, not actual.

SECTION 3.b

MASSACHUSETTS SCHOOL BUILDING AUTHORITY

OVERVIEW

The Massachusetts School Building Authority (MSBA) is a quasi-independent government authority that provides monetary assistance to cities, towns, and regional school districts seeking to make capital improvements to existing buildings and to construct new buildings. Since the legislature created it in 2004, the MSBA has made over \$14 billion in payments for approved projects.

The MSBA operates independently of the Department of Elementary and Secondary Education. It is neither housed within the Department nor responsible to it. As a quasi-independent authority, it is governed by a Board of Directors; the chair of the Board is the Treasurer of the Commonwealth. The board meets six times a year to approve or deny projects.

According to [Massachusetts General Laws](#): “The authority shall consist of the state treasurer, who shall serve as chairperson, the secretary of administration and finance, the commissioner of education, and 4 additional members appointed by the state treasurer, [two] of whom shall have practical experience in educational facilities planning, school building construction, or architecture and school design, and [two] of whom shall be persons in the field of education with demonstrated knowledge of Massachusetts curriculum frameworks and other relevant federal and state educational standards, each of whom shall serve a term of [two] years; but, a person appointed to fill a vacancy shall serve only for the unexpired term.”

The MSBA has a [steady revenue stream](#) of 1% of revenue generated from the state’s 6.25% [sales tax](#).

WORKING WITH MSBA

Towns, cities, and districts seeking MSBA funding for a project must submit a Statement of Interest demonstrating the extent to which building deficiencies limit their ability to provide high-quality education. SOIs can be submitted either to the Accelerated Repair Program (for time-sensitive issues like roof, window, or boiler replacement) or to the Core Program for larger projects.

Following submission of the SOI, several steps must be completed in order to secure MSBA funding (a more detailed process flow chart from the MSBA can be found on its [website](#)).

First, the MSBA Board reviews the SOI and votes to accept the municipality/district into an Eligibility Period, which lasts up to 270 days, and during which the municipality/district must complete several requirements. The most notable is a local vote to secure funding for the project; the MSBA requires this assurance of local funding before beginning the process toward disbursing its payments.

For districts that complete the requirements of the Eligibility Period, the Board then votes to invite the district into the Feasibility Study phase, at which point the district must provide further project plans and a schematic design. After this point, another local vote is required to secure funding. The MSBA will then vote to award funds or not. If the MSBA approves a project, it will sign a contract with the municipality or regional district in question.

MORE INFORMATION

On the Massachusetts School Building Authority

- “Massachusetts School Building Authority.” Massachusetts School Building Authority. [Website](#)

SECTION 4

ACCOUNTABILITY

OVERVIEW

Alongside state aid to public school districts, Massachusetts' education policy paradigm includes a [state accountability system](#), built to ensure that all students receive the quality education guaranteed under the state's constitution. The accountability system uses a standardized assessment, the Massachusetts Comprehensive Assessment System (MCAS), among other measures to assess school quality, and it allows for increasing levels of state intervention in schools and districts facing persistent problems in serving their students. The system works in three broad steps: collecting accountability data, assessing school and district quality, and applying state intervention as needed. Districts are held accountable for both their results and their plans on how to use state funding to narrow achievement gaps.

STANDARDS-BASED ASSESSMENTS

Massachusetts' accountability system rests upon the state's education standards, required by the Education Reform Act of 1993. The standards delineate expectations of what students should learn by the end of each grade; districts develop curricula aligned with these standards, and teachers develop lesson plans accordingly.

Massachusetts' standardized assessment, the MCAS, is crafted based on these standards, and MCAS results are a key data point in the state's accountability system. A more in-depth discussion of MCAS can be found in the next section of this document.

MCAS tests are developed to measure student competency based on the Commonwealth's academic standards rather than on the specific curricula selected by districts and aligned to those standards.

COLLECTING ACCOUNTABILITY DATA

Massachusetts uses a broad range of data points to determine school quality. These data points, called indicators, are informed by requirements in state and federal law.

Indicators include:

- “Achievement,” meaning student performance on the MCAS standardized assessment
- “Growth,” or student improvement on the MCAS
- High school completion, including four-year graduation rate, five-year graduation rate, and dropout rate
- English language proficiency (for students whose first language is not English)
- “Additional indicators,” including chronic absenteeism and percentage of students taking advanced coursework

These indicators are reported both for schools and districts as a whole *and* for a school’s or district’s lowest performing students. Results must also be reported for 11 subgroups: American Indian or Alaska Native; Asian; African American or Black; Hispanic or Latino; Multi-race, non-Hispanic or Latino; Native Hawaiian or Pacific Islander; White; economically disadvantaged students; students with disabilities; current and former English learners (ELs); and high needs students (an unduplicated count of students who are economically disadvantaged, students with disabilities, and/or ELs and former ELs). In order to report data for a subgroup, there must be results for at least 20 students.

When evaluating the performance of schools and districts, there is an active debate nationally and in Massachusetts on the appropriate ratio of growth to achievement in student assessment. Achievement measures all students, and thus all schools, by common benchmarks, and, consequently, achievement scores are comparable across districts. Growth, on the other hand, measures improvement over past results. Policymakers and academics entertain a wide range of views on how much states and districts should emphasize one or the other, as outlined in an [American Institutes for Research](#) paper describing the debate and arguments for both approaches.

In its accountability system, Massachusetts uses a 3-to-1 ratio of achievement to growth, meaning that student scores on MCAS are weighed more heavily than the extent of student improvement. In so doing, the Commonwealth has made an intentional choice to emphasize achievement to ensure that all students are expected to meet the same high level of educational excellence.

Growth, in measuring a given student’s level of improvement over time, can be useful in assessing an intervention’s effectiveness at the level of an individual student; achievement, in measuring a student’s level of competency in a given subject, can be assessed comparatively, telling policymakers how academic results between schools and districts differ. Because of this comparative property, Massachusetts’ emphasis on achievement allows the state to compare schools and districts across the Commonwealth through an equity lens.

ASSESSMENT OF SCHOOL AND DISTRICT QUALITY

Based on the above accountability indicators, the Department of Elementary and Secondary Education calculates two scores for each public school and district: a *normative component*, which is a percentile showing where a school or district stands on accountability indicators compared to all schools or districts in the state, and a *criterion-referenced component*, which measures a school's or district's progress toward meeting its own goals for improvement.

Together, these scores inform the school's or district's categorization in the state's accountability system. There are seven categories in descending order, as seen in the graphic below. (The highest-level category, "Schools of Recognition," is available only to schools, not to districts.)

Schools and districts in the bottom two categories, that is, those "requiring assistance or intervention," are **required** to create turnaround plans that "identify priority areas for turnaround and select strategic initiatives at both the school and district level to address the priority areas. The plan also requires clear benchmarks for student achievement and other indicators toward achieving Measurable Annual Goals (MAGs)."

Schools and districts requiring "Broad/comprehensive support" **must create** accelerated, three-year turnaround plans. They are designated on the basis of continued poor performance on the state's standardized assessment and lack of improvement. The schools and districts that struggle most persistently, also known as "chronically underperforming," are placed into receivership.

Schools without required assistance or intervention (approximately 85%)

Schools requiring assistance or intervention (approximately 15%)

Schools of recognition	Meeting or exceeding targets	Substantial progress toward targets	Moderate progress toward targets	Limited or no progress toward targets	Focused/targeted support	Broad/comprehensive support
Schools demonstrating high achievement, significant improvement, or high growth	Criterion-referenced target percentage 75-100	Criterion-referenced target percentage 50-74	Criterion-referenced target percentage 25-49	Criterion-referenced target percentage 0-24	<ul style="list-style-type: none"> • Schools with percentiles 1-10 not already identified for broad/comprehensive support • Schools with low graduation rate • Schools with low performing subgroups; • Schools with low participation 	<ul style="list-style-type: none"> • Underperforming schools; • Chronically underperforming schools

Districts without required assistance or intervention				Districts requiring assistance or intervention	
Meeting or exceeding targets	Substantial progress toward targets	Moderate progress toward targets	Limited or no progress toward targets	Focused/targeted support	Broad/comprehensive support
Criterion-referenced target percentage 75-100	Criterion-referenced target percentage 50-74	Criterion-referenced target percentage 25-49	Criterion-referenced target percentage 0-24	<ul style="list-style-type: none"> · Districts with low graduation rate · Districts with low participation 	<ul style="list-style-type: none"> · Underperforming districts; · Chronically underperforming districts

Source: "Summary of Massachusetts' District and School Accountability System," Massachusetts Department of Elementary and Secondary Education, June 2019.

The Department of Elementary and Secondary Education classifies districts according to the above metrics by using data supplied by districts.

In addition, the Office of District Reviews and Monitoring (ODRM) uses DESE's District Standards and Indicators to perform more [comprehensive reviews](#) of school districts. During the course of a review, ODRM assesses the accuracy of district reports, inspects schools to "evaluate efforts to improve and support the quality of instruction and administration," reviews the district's MCAS success plan and its implementation of any MCAS-related grants, evaluates alignment of curriculum and professional development programs with state guidelines, reviews the progress of overall student achievement, and assesses overall district performance. After these reports are presented to the Board of Elementary and Secondary Education, the Commissioner of Elementary and Secondary Education issues recommendations to districts. ODRM must perform at least 40 such reviews per year, of which at least 75% must be of districts whose levels of student achievement are low.

ACCOUNTABILITY IN THE STUDENT OPPORTUNITY ACT

On November 26, 2019, the Student Opportunity Act was signed into law, updating the formula by which the state calculates chapter 70 aid to school districts and introducing accountability measures aligned with district spending priorities, including up-front planning requirements and reporting on results.

The law's chief accountability measure is a requirement that all districts submit to the Department of Elementary and Secondary Education three-year plans detailing how they will use state aid to narrow achievement gaps. These plans must stipulate evidence-based programs that districts will use, or else explain the lack thereof. In crafting the plans, districts must engage community stakeholders, including parents. The Commissioner of Elementary and Secondary Education is empowered to reject the plans or request alterations.

MORE INFORMATION

On Massachusetts' education accountability system:

- “Accountability and Assistance System Overview.” Massachusetts Department of Elementary and Secondary Education. [Website](#).

On achievement/proficiency and growth:

- Lachlan-Haché, Lisa & Marina Castro. “Proficiency or Growth? An Exploration of Two Approaches for Writing Student Learning Targets.” American Institutes for Research. April 2015. [Study](#).

SECTION 4.a

MASSACHUSETTS COMPREHENSIVE ASSESSMENT SYSTEM (MCAS)

OVERVIEW

The Massachusetts Comprehensive Assessment System (MCAS) is Massachusetts' annual standardized test. It consists of standardized tests in the following grades and subjects, current as of 2019:

GRADE	SUBJECTS
3	English language arts (ELA), mathematics
4	ELA, mathematics
5	ELA, math, STEM
6	ELA, math
7	ELA, math
8	ELA, math, STEM
10	ELA, math
High school (year not specified, to be taken in year when taking the appropriate class)	Biology, chemistry, introductory physics

English language learners are additionally required to take an annual English proficiency test called [ACCESS for ELLS](#).

As outlined above, results from the MCAS are used in the school and district accountability system. Students must also pass the 10th-grade MCAS in order to receive a diploma from a Massachusetts high school, though there are [alternative assessments](#) available in some cases. A student with cognitive disabilities that would make a timed test especially challenging, for

example, may be assessed based on a portfolio of work collected by the student and his/her teacher.

The most recent results on the MCAS, by grade, subject, district, and school, are published by the [Department of Elementary and Secondary Education](#) and by the [Boston Globe](#).

HISTORY

Massachusetts began administering MCAS tests in 1998, five years after the Education Reform Act of 1993. They were first used as a graduation requirement with the class of 2003.

Between 1998 and 2014, all districts administered MCAS. There have been some additions over time in the subjects tested—ELA and mathematics have always been tested, science subjects are more recent additions, and the state piloted a history test that has not yet been adopted.

In 2014, Massachusetts began transitioning from the MCAS to PARCC, a test that measured more than basic skills. PARCC (Partnership for Assessment of Readiness for College and Careers) was designed to assess postsecondary readiness based on the Common Core, a nationally-developed set of college- and career-ready standards in mathematics and English language arts. The then-Commissioner of Elementary and Secondary Education in Massachusetts, Mitchell Chester, chaired the multi-state consortium that developed the PARCC tests.

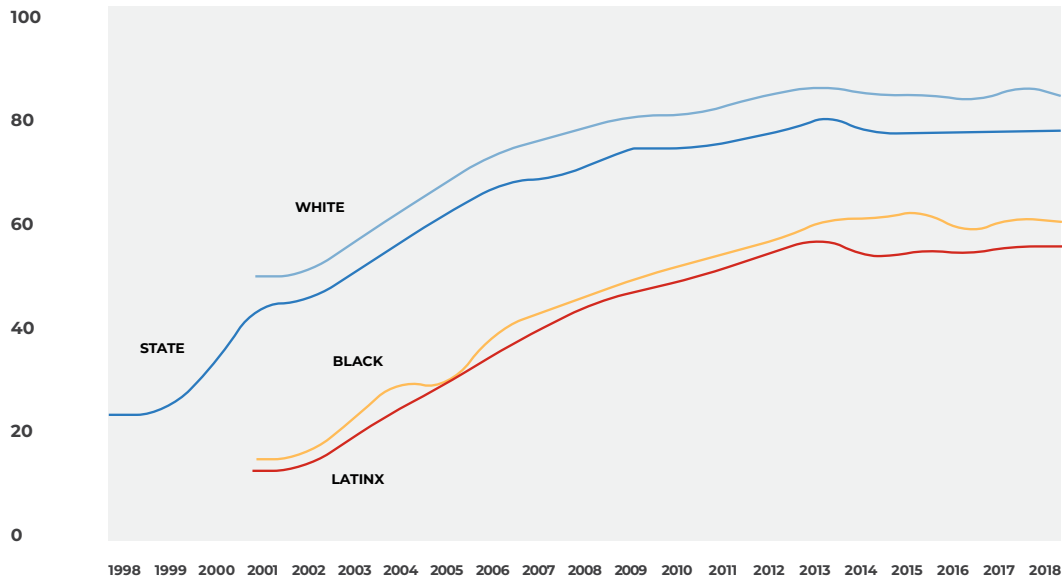
In 2015, however, the Massachusetts Board of Elementary and Secondary Education decided to cease transitioning to PARCC amid concerns that the new test was less rigorous than the MCAS. Instead, the state decided to develop a new test, a hybrid of the MCAS and PARCC, called “Next Generation MCAS” or “MCAS 2.0.” Whereas the original MCAS was a paper-and-pencil test, the “Next Generation” MCAS is computer-based.

As of 2019, all Massachusetts schools and districts have transitioned to the Next Generation MCAS. In general, studies have concluded that PARCC is predictive of college and career success, while results for MCAS have been mixed. A study by researchers at Mathematica commissioned by the Massachusetts Department of Elementary and Secondary Education in 2015 [found](#) that both PARCC and the MCAS were predictive of college and career success. However, a 2015 study released by Massachusetts Business Alliance for Education and the Center for Assessment [found](#) that PARCC serves as “a good indicator of college and career readiness,” but that the first-generation MCAS does not.

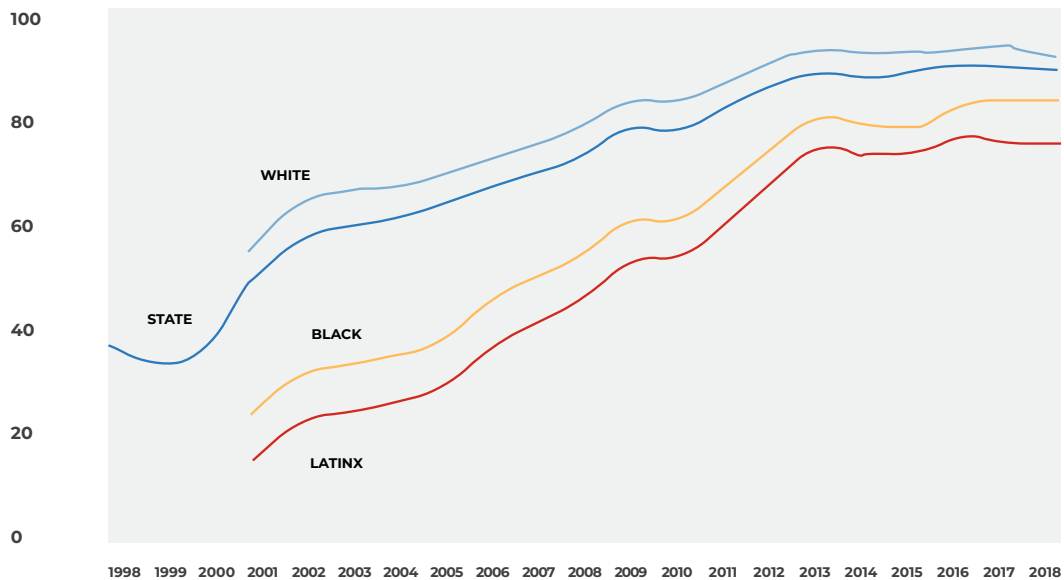
A [2020 study](#) completed through a partnership among Harvard University, Brown University, and the Massachusetts Department of Elementary and Secondary found that a student’s MCAS performance is predictive of his/her probability of graduating high school, post-secondary education attainment, and earnings at age 30. The study also shows that higher MCAS scores reduce the correlation between a student’s socioeconomic status and these three life outcomes.

MCAS results show substantial statewide improvement in core subject competence over time. Between 1998 and 2018, the percentage of Massachusetts 10th graders proficient in mathematics rose from 24% to 78%. The percentage proficient in English language arts rose from 38% to 91%. Gains have been dramatic across subgroups, though recent abatement of progress and persistent achievement gaps demonstrates that more work must be done.

Percent Proficient or Advanced, 10th Grade Mathematics



Percent Proficient or Advanced, 10th Grade English Language Arts



NB: We do not use data from the 2019 MCAS in the above figures and charts because Massachusetts' high schools transitioned to the MCAS 2.0 in 2019, meaning that 2019 data is not comparable to earlier data.

SECTION 4.b:

STATE INTERVENTION: TURNAROUND AND RECEIVERSHIP

OVERVIEW

In Massachusetts, “turnaround” refers to the process by which the state government intervenes in underperforming schools and districts to yield improvements, and “receivership” refers to a decision by the Board of Elementary and Secondary Education to take control of a school or district deemed “chronically underperforming” and in need of state intervention to begin a turnaround. While schools have entered and exited turnaround status since Massachusetts authorized the practice, only three districts have come under receivership as defined in the 2010 Act Relative to the Achievement Gap: Lawrence (in 2011), Holyoke (in 2015), and Southbridge (in 2016). All three districts are under state receivership as of 2020.

HOW IT WORKS

In 2010, the Massachusetts legislature passed a bill titled “An Act Relative to the Achievement Gap.” The law paired updated standards and accountability for schools and districts with an influx of revenue from the Obama administration’s Race to the Top competitive grant program. The bill also included an increase to the Commonwealth’s charter school cap in certain low-performing districts.

A key reform included in the law was the [turnaround process](#) for underperforming schools and districts. Under this process, schools and districts deemed underperforming based on successive years of low student achievement are required to develop a **turnaround plan** with the participation of a local stakeholder group and the state. The plan must include steps to improve student achievement, narrow achievement gaps, address any financial issues, and improve both student services and workforce development. It must also include measurable, annual goals. Under a district turnaround plan, the superintendent is granted increased flexibility and may implement turnaround measures including altering the curriculum, expanding the school day or year, or changing the staff hiring process, though collective bargaining remains in force. Turnaround plans may only remain in force for up to three years and are reviewed at least annually by the Commissioner.

Paired with the turnaround process is [state receivership](#) for Massachusetts' most persistently underperforming schools and districts. Under this process, the Commissioner of Elementary and Secondary Education is empowered to recommend state receivership for any school or district in the state's bottom 10% by academic performance. The school or district must be both low performing and, according to the Department of Elementary and Secondary Education, "not showing signs of substantial improvement over time." If the Board places a school or district into receivership following the Commissioner's recommendation, the local school committee is relieved of control, and a state-appointed receiver instead takes the helm.

Receivership offers schools and districts several flexibilities, autonomies, and authorities not generally available to them. The receiver can revise scheduling, curriculum, and finance, alter or abrogate existing collective bargaining agreements, and require staff or leadership to re-apply for their positions.

Labor/management relations under receivership differ significantly from usual operations. Under receivership, the receiver is empowered to abridge any previous collectively bargained provisions and require a new contract with bargaining units. Receivers may require all staff members to reapply for their positions, though receivership in Massachusetts has not entailed mass layoffs of teachers. Collective bargaining remains in force under the new contract, and the receiver is [required](#) to convene and collect recommendations from a local stakeholders' group that includes the local teachers union.

STATE OF RESEARCH

While three districts have been placed into receivership, only one—Lawrence—has thus far been the focus of a significant amount of research. That research [shows highly positive results](#). Over the course of receivership, Lawrence's graduation rate has risen over 25 percentage points. Its MCAS scores have risen substantially, and it has seen a marked decrease in the number of students attending low-quality schools.

On a national level, research on the effectiveness of state takeovers is mixed. A 2002 study by Kenneth Wong and Francis Shen, for example, found a great deal of variance in the effectiveness of state takeovers nationwide, though they concluded that "state takeovers may [...] be able to produce positive achievement gains [...] after a period of adjustment."

MORE INFORMATION

More on the success of receivership in Lawrence

- Griffin, John. *Money, Mediocrity, and Making Change - A Tale of Two Cities: Comparing Progress in Boston & Lawrence*. Education Reform Now Advocacy. 2019.
- Schueler, Beth. "A Third Way: The Politics of School District Takeover and Turnaround in Lawrence, Massachusetts." *Educational Administration Quarterly*. 2 July 2018.

DESEGREGATION, DEMOGRAPHICS, AND DIVERSITY

SECTION 5

DESEGREGATION EFFORTS

OVERVIEW

Segregation manifests in school systems in many ways: wide-ranging disparities in resources and opportunity, lower education quality in neighborhoods with high populations of low-income students and families, and a lack of representation in teachers and staff. Many states and districts are actively pursuing strategies to desegregate schools and the neighborhoods from which they draw students. In Massachusetts, the most substantial desegregation program is the Metropolitan Council for Education Opportunity, or METCO, which transports students from Boston and Springfield to schools in the suburbs.

IN MASSACHUSETTS

Massachusetts is divided into over 400 public school districts, including traditional districts and charter public schools. Most of these districts align with municipal borders. Combined with Massachusetts's history of residential segregation and the segregating nature of [school district borders](#), this patchwork of districts has contributed to a long history of segregation by race and socioeconomic status in the Commonwealth's schools. Massachusetts's continued struggle with school segregation reflects both policy choices made even in the present day and the legacy of our political geography's municipal boundaries.

In 1965, the Massachusetts Board of Education released a [report](#) on the harm of racial disparities on students in the Commonwealth's public schools. Later that year, the state legislature passed the Racial Imbalance Act, which made it illegal for the state's schools to segregate by race. Yet, by many measures, school segregation is more prevalent five decades later.

Busing has been a major topic in the movement for integration, including the case of [Morgan v. Hennigan](#) where the NAACP joined parents in a federal lawsuit against the Boston School Committee, charging that the School Committee was violating students' constitutional rights by preserving de facto school segregation and underfunding majority-black schools. The court implemented a busing plan that allowed black students to enroll in schools outside of their neighborhood, which often received more funding and had better academic results.

Today, METCO is the main vehicle for school desegregation in Massachusetts. It is a voluntary program by which suburban districts agree to enroll students from Boston and Springfield. The voluntary nature of the program means that its scope is limited both by the number of participating districts and the number of students each district chooses to accept. As of 2020, 33 suburban districts [participate](#), accepting anywhere from 26 to 435 students.

METCO is funded through its own line-item in the state budget, as well as chapter 70 money following each child. Districts are financially responsible for providing the same level of services to METCO students that they provide to students who reside in the district, including academics, social/emotional supports, meals, and counseling. Studies have shown that METCO [positively impacts](#) student achievement, and some advocates have recently called for [expanding](#) the program.

Other desegregation efforts in the Commonwealth have been largely local in nature. A notable example is Cambridge's "Controlled Choice Plan," which assigns students to schools in the city based on both the family's stated choice among all Cambridge schools and the goal of achieving socioeconomic balance in each school. This plan has been used as a model by other districts, including Lowell.

NATIONAL CONTEXT

Since the 1954 *Brown v. Board of Education* case, the Supreme Court has decided a number of cases that have limited the federal government's role—and, in some cases, even local district's voluntary actions—in curbing segregation.

In 1971, the Court [ruled](#) in *Swann v. Charlotte-Mecklenburg* that busing was an appropriate strategy to pursue racial integration in segregated districts, even when that segregation flowed only from residential patterns (as opposed to the intentional segregation of students into separate schools by race). The Court then limited the potential role of busing in its 1974 decision, *Miliken v. Bradley*, which ruled that *inter-district* busing could not be forced upon a given district unless that district could be shown to have committed a constitutional violation. In the 2007 decision, *Parents Involved in Community Schools v. Seattle School District*, the Court struck down Seattle's school assignment system, ruling that it could not take a student's race into account when deciding that student's school assignment.

65 years after *Brown v. Board*, segregation persists across the country. Black students will most likely [attend](#) a school where 49% of others are also black; Latino students, on average, attend a school where 57% of their peers share their race. These patterns persist not only for black and Latino students but with low-income students as well.

STATE OF RESEARCH

Research shows that increasing diversity and integrating schools is not only beneficial for students of low-income or racial minority, but also for their peers. A 2019 [report from The Century Foundation](#), reviewing recent research on school desegregation and racially diverse classrooms, found that students in integrated schools tend to have higher academic achievement than their peers in more segregated schools and attend college at higher rates. The report also finds that more integrated schools tend to have less drastic achievement gaps and more equitable access to resources.

Research tends to support the idea that desegregation efforts work best when they address the underlying issue of inequitable access to resources and high-quality education generally. Studying opportunity levels in Seattle, a team of researchers [found](#) that housing patterns are strong indicators of opportunity, and that eliminating barriers for families to live in neighborhoods with high levels of resources and opportunities contributed to a striking diminishment in opportunity gaps. Desegregation, in this light, is as much about resource distribution, educational standards, and structural inequalities as it is about the racial distribution of students across schools and districts.

MORE INFORMATION

More on nation-wide segregation trends:

- Noguera, Pedro A. "Why School Integration Matters." *Educational Leadership*. 2019 [Article](#)
- "Fault Lines: America's Most Segregating School District Borders." EdBuild. <https://edbuild.org/content/fault-lines>
- "Gentrification and Disinvestment 2020." National Community Reinvestment Coalition. [Report](#)
- "The Greater Boston Housing Report Card 2019: Supply, Demand, and the Challenge of Local Control." The Boston Foundation. [Report](#)

On the successes of integrated schools:

- Montt, Guillermo. "Are Socioeconomically Integrated Schools Equally Effective for Advantaged and Disadvantaged Students?" *Comparative Education Review*. 2016. [Article](#)
- Potter, Halley, Kimberly Quick, & Elizabeth Davies. "Report shows Districts and Charters Pursuing Socioeconomic Diversity." The Century Foundation. 2019. [Report](#)
- Learned-Miller, Carole. "Cambridge Public Schools: Pioneers of Equitable Choice." The Century Foundation. [Report](#).
- Fife, Brian L. *Desegregation in American Schools: Comparative Intervention Strategies*. Praeger Publishing 1992. [Book](#)

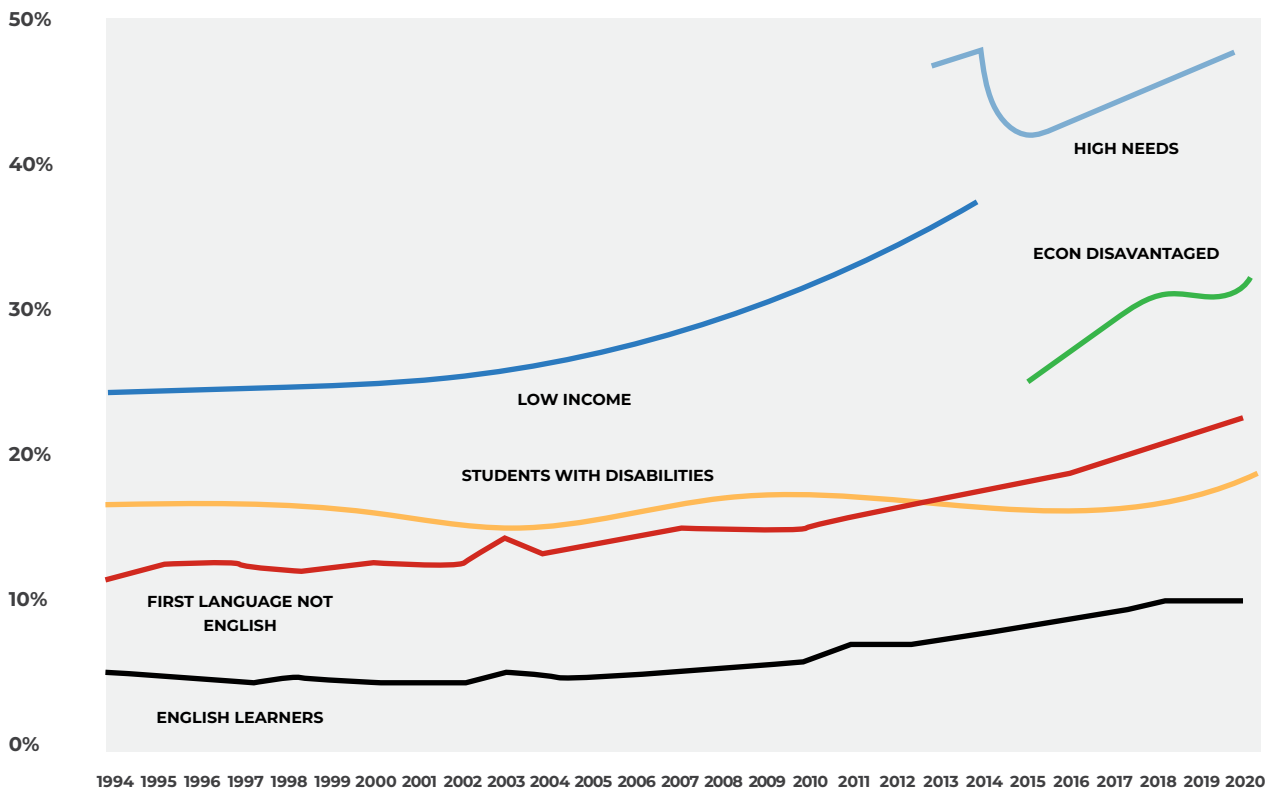
SECTION 6

DEMOGRAPHICS

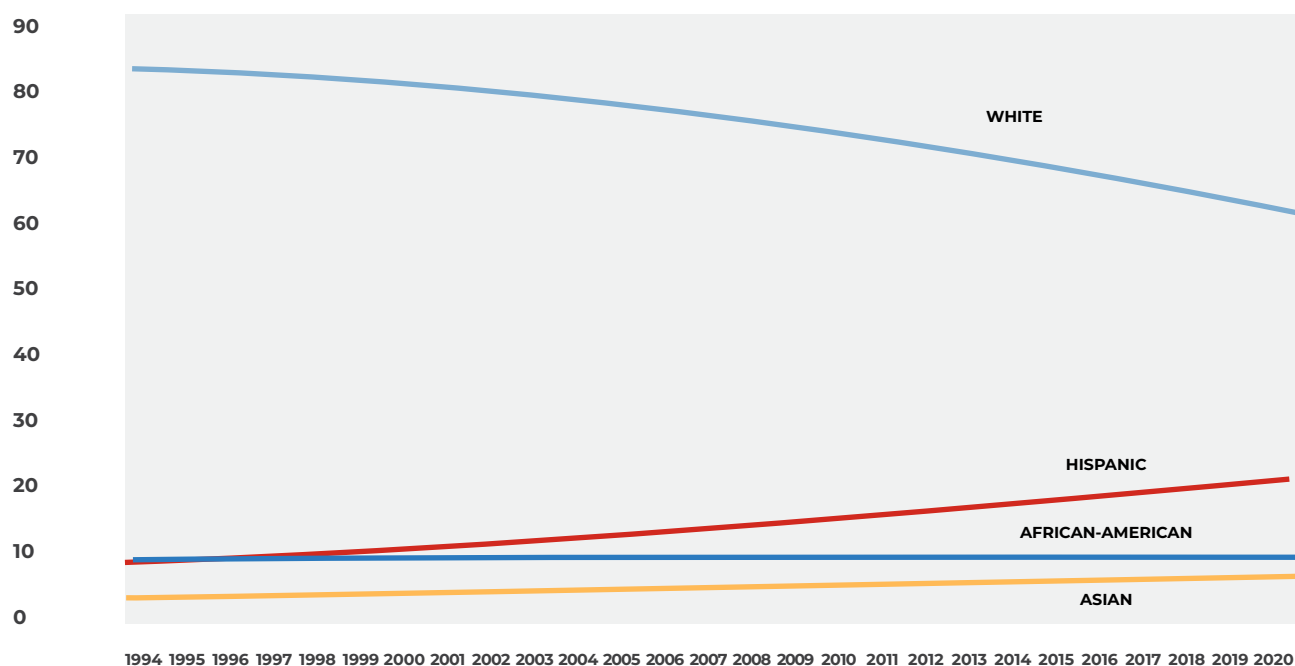
OVERVIEW

Improvements in educational achievement in Massachusetts' schools over the past three decades are even more impressive considering the growing diversity and increasing level of need among the Commonwealth's students. Since 1993, Massachusetts has seen a marked increase in the number of students of color and in the number of students from low-income families. At the same time, the percentage of students with a high level of need—including English learners, students with disabilities, and students from low-income backgrounds—has grown.

Selected Populations of MA Students



Demographics of MA Students



NB: In both of the above charts, the year in the x-axis reflects the *end* of the school reflected in the data. For example, data shown for the school year “2020” above corresponds to the 2019-2020 school year. Also, in 2014, Massachusetts stopped calculating the number of students considered “Low Income” and instead used a different calculation to determine the number of students considered “Economically Disadvantaged.” This change in calculation means the “Low Income” category from 2014 cannot be compared with the current “Economically Disadvantaged” category. In 2019, the Student Opportunity Act again altered the designation process for low-income students, returning it to the method used before 2014.

APPENDIX: AGES OF SCHOOL ATTENDANCE

- All children residing in Massachusetts are required to attend school between the ages of 6 and 16.
- Per state law ([603 CMR 8.00](#)), students must **enroll** in kindergarten in September of the year in which they attain the age of six; they must do so whether they turn 6 before, during, or after September.
- Massachusetts **requires** districts to provide K-12 education to students **through age 21**.
- Students may freely drop out of school after age 16, though the state requires districts to set up exit interviews with all high school dropouts. There are some rare exceptions by which younger students may be allowed to drop out.

SECTION 7

EDUCATOR WORKFORCE DIVERSITY

OVERVIEW

As Massachusetts' student population has grown more diverse in recent decades, the educator workforce has not. Massachusetts' difficulties in this domain mirror a [national pattern](#), in which the educator workforce is growing *more unrepresentative* of the student population over time. This dynamic is especially concerning given the abundance of research suggesting that students of color [benefit](#) academically from having teachers of color, and that students as a whole [benefit](#) from having a diverse group of teachers. Research is especially clear on the benefits to black students of having black teachers. In response, DESE has enacted [programs](#) aimed at increasing teacher diversity, including accelerated certification programs, grants to districts to fund diversity initiatives, and teacher fellowships in a number of target districts.

IN MASSACHUSETTS

According to the Massachusetts Department of Elementary and Secondary Education, faculty and staff members in Massachusetts schools remain much less diverse than their students. While 42% of Massachusetts students were students of color (defined here as those not categorized by the state as white) in the 2019-2020 school year, only 11% of faculty and staff were people of color (defined as those teachers not categorized by the state as white). These figures reflect all staff in Massachusetts public schools; full-time teachers represent 55% of total staff. As of the 2018-2019 school year, 92% of Massachusetts teachers are white.

Difficulties at all steps of the educator pipeline—including recruitment, certification, retention, and professional development—all likely contribute to the state's difficulties in creating an educator workforce whose diversity mirrors the student population. Recent [research](#) from the Harvard Kennedy School suggests that disparities in the early stages of the pipeline drive much of the problem in the Commonwealth, finding that people of color are less likely than other college-educated adults to sit for Massachusetts' educator licensure examinations, the Massachusetts Tests for Educator Licensure (MTEL).

DESE has devoted a number of resources and programs to developing a more diverse workforce. The [Teach Western Mass](#) program, for example, offers an accelerated, one-year teacher certification and training program aimed at bringing a diverse corps of effective teachers to schools and districts across Western Massachusetts. DESE's [Teacher Diversification Pilot Program](#) offers grants to districts for efforts to increase teacher diversity, and its [InSPIRED](#) (In-Service Professionals Increasing the Racial and Ethnic Diversity of our teacher workforce) fellowship empowers educators in select communities "to recruit the next generation of culturally responsive, diverse and effective teachers."

NATIONAL CONTEXT

Similar to Massachusetts, educator diversity nationwide has also lagged behind the growing diversity of the student population. In 2016, the federal Department of Education released a [report](#) titled "The State of Racial Diversity in the Educator Workforce." That report acknowledged the abundance of resources demonstrating the benefits of a racially diverse educator workforce, found that the nationwide educator workforce is 82% white, and highlighted the increasing lack of diversity at progressive steps of the educator pipeline. It also pointed to alternative teacher certification programs, and especially Historically Black Colleges and Universities (HBCUs) as engines of greater educator diversity.

STATE OF RESEARCH

Two key points emerge in research concerning educator diversity. The first is that educator diversity benefits students: studies and reports from the [Center for American Progress](#); [American University](#) and [Johns Hopkins University](#); and [Scientific American](#), among others, bear out this point. The second is that the United States continues to struggle with recruiting and retaining a diverse teacher workforce. The relative lack of diversity has been documented in research from the [Brookings Institution](#); Harvard University's Graduate [School of Education](#); and the federal [Department of Education](#).

MORE INFORMATION

On the state of diversity in the educator workforce:

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EDUCATOR ISSUES

SECTION 8

BARGAINING

OVERVIEW

Collective bargaining refers to the process by which unions negotiate the terms and conditions of employment with employers. In Massachusetts, the right to collective bargaining is recognized for private- and public-sector workers, including teachers in all public schools, both traditional public school districts and charter public schools. Teachers and other public employees first won collective bargaining rights in Wisconsin in 1959, rights which spread to other states throughout the 1960s.

Today, virtually all traditional public school teachers, support staff, and administrators (except principals) in Massachusetts belong to a local union affiliated either with the National Education Association (NEA) or the American Federation of Teachers (AFT).

IN MASSACHUSETTS

In Massachusetts, all teachers in traditional public school districts and in some charter public schools are represented by local bargaining units that “collectively bargain” the terms and conditions of teachers’ employment through contract negotiations. According to the Massachusetts Department of Labor Relations, most public employees in Massachusetts, including teachers, were granted the right to join unions in 1958, and municipal employees were granted the right to collective bargaining for “wages, hours, and terms and conditions of employment” in 1965.

Local bargaining units are affiliates of one of two state-level teachers unions operating in Massachusetts:



The **MASSACHUSETTS TEACHERS ASSOCIATION (MTA)** is an affiliate of the National Education Association (NEA). It is the larger of Massachusetts’ two teacher unions with 115,000 members. It has the majority of urban, suburban, and rural districts and also represents all of public higher education faculty and staff except for the University of Massachusetts, Dartmouth.



The **AMERICAN FEDERATION OF TEACHERS-MASSACHUSETTS (AFT-MA)** is an AFT affiliate. It has approximately 25,000 members, including the state's largest local teachers union, the Boston Teachers Union.

Local unions perform a variety of functions, most notably negotiating collective bargaining agreements on issues involving all teachers in a local district. They also provide members with other services, such as dispute resolution, legal counsel, professional development resources, grassroots organizing, and lobbying at the state and national level. Members have opportunities to serve in leadership positions or on policy-setting commissions at the local, state, and national level.

Massachusetts makes a distinction between “mandatory” and “permissive” subjects of collective bargaining. Mandatory subjects are items that “directly impact terms and conditions of employment” and *must* be decided through collective bargaining. These include salary, health insurance, class sizes, the length of the school day, promotional procedures, and teacher evaluation and employee discipline policies. “Permissive” subjects are items that are only subject to collective bargaining if both the union and the district agree to make them so. These include abolishing or creating positions, reorganization of an employer’s operations, and “matters of education policy.” A full list of “mandatory” and “permissive” subjects of collective bargaining may be found in the Massachusetts Department of Labor Relations’ [A Guide to the Massachusetts Public Employee Collective Bargaining Law](#), pages 152-158.

Collectively bargained agreements may remain in force for up to three years, provided that the parties involved (in education, the school committee and the local teachers’ union) may agree to allow the agreement to remain in effect until a successor agreement is decided upon.

NATIONAL CONTEXT

In recent years, a number of states have passed “right to work” laws prohibiting the requirement that public sector workers, like teachers, join unions. Massachusetts never passed such a law.

In 2017, however, the U.S. Supreme Court ruled in *Janus v. American Federation of State, County, and Municipal Employees* (“*Janus*”) that states and localities may not require public employees to pay agency fees to their collective bargaining unit; this ruling applies to Massachusetts and all states. Shortly after the *Janus* decision, Massachusetts enacted a law allowing a union to require a non-member to pay for the reasonable costs and fees, including arbitrator fees and related attorney fees, for grieving or arbitrating a matter arising under a collective bargaining agreement at the non-member’s request.

Janus does **not** eliminate the right of collective bargaining, and the local union as the “exclusive representative” maintains the authority to bargain on behalf of all employees in the bargaining unit, even those who are not union members. Therefore, all public sector employees in Massachusetts remain subject to the terms of their respective collective bargaining agreement, and non union members cannot bargain for themselves.

MORE INFORMATION

On the history of collective bargaining, both nationally and in Massachusetts:

- Kelly Robson, Kaitlin Pennington, and Juliet Squire. "Overview of the History and Status of Teachers Unions." Bellwether Education. https://bellwethereducation.org/sites/default/files/Janus_BELLWETHER.pdf
- "A Guide to the Massachusetts Public Employee Collective Bargaining Law." Massachusetts Department of Labor Relations. <https://www.mass.gov/doc/a-guide-to-the-massachusetts-public-employee-collective-bargaining-law-1/download>

On Labor Management Collaborationthe relationship between teachers unions and district management:

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- "National Labor-Management Partnership 2018 Call to Action." National Labor-Management Partnership. <http://myschoolmyvoice.nea.org/wp-content/uploads/2018/11/NLMP-2018-Call-to-Action.pdf>
- "Labor-Management Collaboration District Case Studies." U.S. Department of Education. <https://www.ed.gov/labor-management-collaboration/district-case-studies>

Websites of major teachers unions operating in Massachusetts:

- National Education Association, <http://www.nea.org/>
- Massachusetts Teachers Association, <https://massteacher.org/>
- American Federation of Teachers, <https://www.aft.org/>
- American Federation of Teachers, Massachusetts, <https://www.aft.org/affiliate/08019-0>

SECTION 9

TEACHER PREPARATION, LICENSURE, AND PROFESSIONAL STATUS

OVERVIEW

Teacher preparation refers to the processes by which individuals become licensed teachers, including training and education programs attended to gain licensure. These programs are meant to produce teachers who are able to lead their future students to success.

IN MASSACHUSETTS

In order to become a teacher in any Massachusetts public school, candidates must pass a series of exams known as the Massachusetts Test for Education Licensure (MTEL). Teaching certifications, as well as preparation courses for the exam, are often paired with a degree gained through a teacher prep program at the college level. An initial teacher's license is good for five years, at which point teachers must apply for a "professional" teacher's license, which [requires](#) masters-level education.

Teachers receive "professional status," sometimes called tenure, after three years of employment, without regard to performance or any metric other than career longevity. Superintendents may also grant professional status to teachers before the three-year mark on recommendation of that teacher's school principal.

Once a teacher attains professional status, he or she may only be removed for "good cause." This means teachers with professional status can be dismissed only for "inefficiency, incompetency, incapacity, conduct unbecoming a teacher, insubordination or failure on the part of the teacher to satisfy teacher performance standards," and may be dismissed for performance-related reasons only after undergoing a years-long cycle of evaluation and professional development; they also have the right to appeal such decisions to arbitration.

Current reform efforts toward teacher preparation in Massachusetts include district-based programs aimed at training teachers for urban schools and implementing the use of partner schools to allow teaching candidates a chance for real practice. This combines theory with

practice and allows earlier access to in-classroom experience. Improving teacher preparation programs may also constitute an important strategy for increasing teacher retention: in 2020, the statewide teacher retention rate is 87.7%.

Teacher preparation programs are evaluated through a formal review process and a Candidate Assessment of Performance (CAP) by the Department of Elementary and Secondary Education.

NATIONAL CONTEXT

Nationwide, teacher preparation programs have highly variable effectiveness; many teachers graduate their programs unprepared to serve the communities and classrooms they enter. A [2013 review](#) of teacher education programs by the National Council on Teacher Quality (NCTQ) found a wide range among programs. The NCTQ review emphasized that many programs are relatively unselective and that most programs do not prepare aspiring teachers to teach content to the levels required by state standards. In 2019, NCTQ's [assessment](#) showed some improvement, especially in reading instruction.

Massachusetts' state teaching licensure is valid in most states due to an interstate agreement. Teacher licenses from other states are not valid in Massachusetts, however; teachers licensed in other states must obtain a Massachusetts teacher's license to work in the Commonwealth. Administrators with out-of-state administrator licenses and at least three years of experience may qualify for a temporary administrator license in Massachusetts but must seek a Massachusetts license for permanent employment.

With regard to tenure, many states have recently removed tenure or diminished its protections. In states like Indiana and Texas, teachers must rely on annual contracts. Other states, like Rhode Island, require a teacher to undergo a performance review before receiving tenure.

STATE OF RESEARCH

Research shows major issues in teacher preparation across the nation.

According to a [2016 study](#) from Endicott College, 26% of teachers reported feeling unprepared for their first year on the job. However, those who trained in the same state they later taught in were more successful overall. Teacher preparation programs are not held to a common standard, so their curriculums and levels of preparation vary widely. There is an overall lack of training in social/emotional education and cultural competency, which is especially important in Massachusetts given that [90% the state's school staff are white](#) while [42% of students](#) are nonwhite.

With regards to professional status/tenure, research is **inconclusive** as to its impact on student achievement. The recent trend of states eliminating or weakening teacher tenure has provided researchers with case studies: A Brookings Institution study found that student outcomes

improved slightly in Florida after tenure was eliminated, with larger gains among low-income students. Studies focused on North Carolina have tended to find that the state's tenure system was effective in selecting high-quality teachers for tenure, but that a moratorium on tenure had little impact on student achievement.

MORE INFORMATION

On Methods of Teacher Prep:

- Solomon, Jesse. "District-based Teacher Education in Boston." *Journal of Teacher Education*. 2009. [Article](#):
- Crowe, Edward. "Race to the Top and Teacher Preparation" Center for American Progress. 2011. [Report](#).
- Barone, Charles & Cope, Heather. "[A Deep Dive into Alternative Teacher Prep](#)" Education Reform Now. 2019
- Greenburg, Julie, Arthur McKee, & Kate Walsh. "Teacher Prep Review." National Council on Teacher Quality. 2013. [Review](#)

On how teacher tenure works in Massachusetts:

- MGL Title XII, Ch. 71, §41, "[Tenure of teachers and superintendents; persons entitled to professional teacher status; dismissal; review.](#)"
- National Council on Teacher Quality (NCTQ), "[Teacher Evaluation Policy in Massachusetts.](#)"

On the effectiveness of teacher tenure:

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- Jennifer Thomsen, "[Teacher Performance Plays a Growing Role in Employment Decisions.](#)" Education Commission of the State
- Elizabeth Phillips, "[The Effect of Tenure on Teacher Performance in Secondary Education.](#)"
- Dana E. Fenster, "[Implications of Teacher Tenure on Teacher Quality and Student Performance in North Carolina.](#)"
- Matthew M. Chingos, "[Ending Teacher Tenure Would Have Little Impact on Its Own.](#)" Brookings Institution.

SECTION 10

PAY DIFFERENTIATION

OVERVIEW

Differentiated pay refers to teachers receiving salaries through alternative pay structures that are based on a variety of factors other than career longevity and educational attainment alone. For example, teachers working in schools with large amounts of high-need students may be paid more under differentiated pay systems. Another version of this idea is performance-based pay, which aims to incentivize quality teaching and growth in talent over time by rewarding performance.

IN MASSACHUSETTS

Performance pay is [not widely used](#) in Massachusetts. In 2010, the federal Teacher Incentive Fund [awarded](#) Massachusetts \$27 million to accelerate teaching improvement efforts in Boston and Springfield through its “[aMAzing Educators](#)” initiative. Massachusetts included in its plan for use of the funds an increase in differentiated pay options for teachers to increase retainment. There is no publicly available report on the outcome of this initiative.

NATIONAL CONTEXT

Nationwide, differentiated teacher pay has been implemented in various forms and contexts, including performance-based pay programs and professional development compensations. This movement was spurred by the link some researchers have made between teacher skill and performance to student achievement, with many studies showing that teacher quality is the most important factor in determining student success. An article from the nonprofit research organization [WestEd details the policy trend](#), where it comes from, and the many ways differentiated pay is implemented. In addition, the Center for American Progress has published multiple reports on differentiated pay in specific districts throughout the country including [New Haven and Baltimore](#).

STATE OF RESEARCH

More research is needed for an in-depth exploration of differentiated pay and its value.

Results have been mixed regarding the many variations of differentiated pay. Performance pay is one of the most common methods, but research is unclear as to what this pay system's effects are on student achievement.

MORE INFORMATION

On the History of Teacher Pay:

- Protsik, Jean. "History of Teacher Pay and Incentive Reforms" *Journal of School Leadership*. 1996. [Article](#)

On Performance Pay:

- Liang, Guodong & Motoko Akiba. "Performance-Related Pay: District and Teacher Characteristics." *Journal of School Leadership*. 2011. [Article](#)
- Mintrop, Rick, Miguel Ordenes, & Erin Coghlan. "Teacher Evaluation, Pay for Performance, and Learning Around Instruction" *Education Administration Quarterly*. 2013. [Article](#)

ALTERNATIVE SCHOOL MODELS AND PATHWAYS

SECTION 11

REGIONAL SCHOOL DISTRICTS

OVERVIEW

While the majority of Massachusetts school districts are coterminous with a single city or town, there are also [58](#) regional school districts in the state. These districts are [formed](#) by voluntary association of multiple municipalities into a single district; agreeing municipalities may choose to regionalize all grades or only some. The Amherst-Pelham regional school district, for example, serves grades 7-12, and the local school districts each serve their own K-6 students.

IN MASSACHUSETTS

Regional school districts receive funding through the same mechanism as other districts in the state, the chapter 70 formula.

The 2019 Student Opportunity Act mandated the establishment of a Regional Schools Commission to address the specific financial challenges facing regional school districts, many of which face significant transportation costs and declining student populations.

Regional school districts are most common in the less population-dense parts of the Commonwealth, such as Western Massachusetts and Cape Cod. In 2018, the Department of Elementary and Secondary Education released a [report](#) showing that enrollment had declined over a 10-year period in rural districts while remaining stable statewide. Declining enrollment, combined with the rural nature of such districts, places strains on their budgets, particularly in operations and transportation. The report recommended “providing resources and incentives to encourage districts to expand existing regional districts or share services more broadly.” By consolidating costs, regionalization could mitigate some of the financial burdens faced by districts with declining enrollment.

There are a number of specialized subsets of regional districts. Vocational/technical districts, which are covered in their own section below, are often organized regionally to provide students with career and academic education concurrently. The Commonwealth also offers six [agricultural schools](#), most of them high schools, that operate regionally.

NATIONAL CONTEXT

Outside of New England, school districts are not as commonly associated with a single municipality. The unique history of New England's municipal governance structure has led to a similarly characteristic structure of school governance. Nationwide, many school districts are effectively "regional," in that their catchment boundaries do not confirm with a single city's or town's.

In New England, Connecticut is seeking greater regionalization as a means to reduce costs and increase efficiency in public education. In 2019, the Connecticut state legislature established a commission to recommend paths forward for greater regionalization.

MORE INFORMATION

On regional school districts in Massachusetts:

- Massachusetts Department of Elementary and Secondary Education. "Regional School District Organization." [Website](#)
- Cronin, Joseph M. "A Case Study of School District Consolidation." AASA: The School Superintendents Association. [Report](#).

SECTION 12

VOCATIONAL/ TECHNICAL SCHOOLS

OVERVIEW

Vocational/technical (Voc-tech) programs, which offer career-oriented instruction in addition to academics, are offered both within traditional school districts and as independent, regional vocational/technical districts. These programs offer alternative educational opportunities to students who wish to learn a trade. Regional vocational/technical districts operate similarly to other school districts, formed by agreement of participating traditional districts and funded through tuition payments made by those districts. Vocational/technical education is popular in Massachusetts, with rising enrollment and competitive admission leading to some concern that many students who would thrive in a voc/tech school lack access.

IN MASSACHUSETTS

In Massachusetts, vocational/technical programs are governed by [Chapter 74 of the General Laws](#). Voc-techs are defined by the legislature as school programs that are “designed to educate and prepare students for both employment and continuing academic and occupational preparation.” These programs combine competency-based instruction in a career-focused field, such as culinary arts, cosmetology, automobile repair, and engineering, as well as academic preparation consistent with Massachusetts’ academic standards.

While some of these programs operate within traditional districts or single district schools, the state counts [26 regional vocational-technical school districts](#), which function as independent districts of choice. In total, more than 62,000 students across the Commonwealth [enrolled](#) in such programs in the 2019 to 2020 school year, accounting for 17% of all enrollment.

As independent districts, vocational-technical school districts operate under an enrollment and funding structure distinct from that of traditional district schools. Vocational technical districts are a type of regional school district, formed by the voluntary association of two or more districts, subject to approval by the Commissioner of Elementary and Secondary Education. Regional vocational/technical districts are administered by a regional vocational/technical school committee, called boards of district trustees. These boards may consist either of the

chair and two members of each municipality's school committee, or of three residents of each municipality.

The districts are funded through payments provided by each participating municipality. Under the agreements by which they partake in a vocational/technical district, sending districts are responsible for both instruction and transportation for the students they send to the vocational/technical school. In some cases, non-resident students may be admitted; their sending district also generally must provide payments to the vocational/technical district.

Many vocational/technical programs in Massachusetts are facing greater numbers of applicants than they have spots to fill. The state allows vocational/technical districts to employ competitive screening processes to determine admission, which has generated some concern that many programs are admitting students who will not go into the career fields aligned with their training while denying spots to students who would enter those career fields.

NATIONAL CONTEXT

As in Massachusetts, vocational education has experienced increasing enrollment nationwide for the past decade, following several years of decline. As of 2012, which is the most recent data available, there were 3.8 million students enrolled in vocational/technical programs nationwide. State regulations vary, and this figure includes students in both vocational/technical schools and traditional schools with vocational/technical programs.

Updated research is scant on the nationwide impact of vocational/technical education on student outcomes. As the [Brookings Institution outlined in a report on vocational/technical education](#), earlier, non-experimental research tends to support the conclusion that students in such programs have better career prospects and outcomes than their peers. Vocational/technical students may also be more motivated than peers, perhaps because many self-select into the programs.

STATE OF RESEARCH

According to the Massachusetts Budget and Policy Center, a nationwide study of voc-techs found that such programs can effectively boost earnings for graduates by about 11%, as the schools focus on preparing students to participate in the workforce. This increase in income was driven entirely by an increase in the earnings of male students, especially at-risk young men. Another controlled study of one voc-tech in California found that attendance increased the probability that students attended both 2-year and 4-year higher education institutions.

Similar patterns hold for voc-tech schools in Massachusetts. An [analysis](#) by Alison Fraser of Queen's University found that Massachusetts' voc/tech programs had lower dropout rates, higher graduation rates, and higher MCAS scores than traditional public schools in Massachusetts. Vocational/technical schools in Massachusetts also graduate students with disabilities at

significantly higher rates than the state's traditional public schools (81% vs 61%.) However, these results are not the products of formal studies and thus could be the result of vocational/technical schools and traditional public schools having different student demographics. One regression-discontinuity study of Massachusetts voc-techs [found](#) that while voc-techs substantially boosted graduation rate by 10%, there was no effect on test scores.

MORE INFORMATION

On vocational/technical education in Massachusetts

- Massachusetts Budget and Policy Center, "[Skills for Our Future: Vocational Education in Massachusetts.](#)"
- Massachusetts Department of Elementary and Secondary Education, "[Chapter 74 Programs.](#)"

On vocational/technical education nationwide:

- The Brookings Institution, "[What We Know about Career and Technical Education in High School.](#)"

SECTION 13

CAREER PATHWAYS

OVERVIEW

Career pathways refer to programs that help students access pathways to high-quality post-secondary careers. It is important to note that these pathways do not take the place of post-secondary, higher education—in many cases, they will include higher education. Rather, they are programs focused on providing students with the preparation, resources, credentials, and guidance for success in the career of their choosing.

IN MASSACHUSETTS

In 2017, Massachusetts launched the High Quality College and Career Pathways Initiative, with the goal of expanding student access to high quality career pathways. The Initiative includes two pathways in addition to vocational/technical programs: **early college** (discussed in its own section below) and **innovation pathways**.

Innovation Pathways are programs designated by DESE that connect students to careers in in-demand industries, such as information technology or healthcare. The designation process begins with a joint application to DESE by a K-12 district and an employer representative. To receive a designation, programs must follow five “guiding principles”:

- (1.) Equity, “eliminating barriers to student participation,” especially for students from historically underserved groups
- (2.) Guided academic pathways, including at least two technical courses and two college-level courses
- (3.) Enhanced student supports, like wraparound supports (discussed below)
- (4.) Connection to career, including a 100-hour internship capstone
- (5.) Effective partnership between at least one K-12 district and at least one employer representative

The Pathway must lead to industry-recognized credentials. Current Innovation Pathways programs can be found [at the “Designation Innovation Pathways” page](#) of DESE’s website.

To help students develop pathways to postsecondary success, DESE offers a tool called the [My Career and Academic Plan \(MyCAP\)](#). This student-led, multi-year planning tool allows schools and districts to help students identify their interests and potential careers, map out paths to success in those careers, and access the resources, credentials, and coursework needed for success. All students in an Innovation Pathways program must use the MyCAP tool.

One proposal for expanding career education in the Commonwealth involves allowing traditional public school districts to [grant industry-recognized career certifications](#) to students. In a 2018 paper, the Massachusetts Business Alliance for Education reported that 72% of Massachusetts jobs would require either a career certificate or a college degree by 2020.

NATIONAL CONTEXT

Nationally, the [Carl D. Perkins Career and Technical Education Act of 2006](#) (Perkins IV) provides funding to states “for the improvement of secondary and postsecondary career and technical education programs.” In 2020, the federal government estimates it will disburse over \$1 billion to states through Perkins IV.

MORE INFORMATION

On career pathways in Massachusetts:

- Massachusetts Department of Elementary and Secondary Education. “Massachusetts High Quality College and Career Pathways Initiative.” [Website](#).

On proposals around granting industry credentials in traditional public schools:

- Massachusetts Business Alliance for Education. “A Proposal to Expand Opportunities to Earn Industry-Recognized Credentials.” 2018. [White Paper](#).

SECTION 14

EARLY COLLEGE

OVERVIEW

In early college programs, high school students undertake college-level coursework. They can do so by fully enrolling in college classes, either at a nearby college or online, or by attending some college courses while also taking classes at their secondary school. These programs allow students to earn college credits while simultaneously finishing high school, often saving them later tuition payments. Research supports the benefit of early college, especially for academically strong students. Students who participate in early college programs can obtain a head start on college-level material, acclimate to post-secondary education, and often gain a stronger level of confidence in their suitability for college.

IN MASSACHUSETTS

In 2017, the Massachusetts Department of Higher Education created the Early College Initiative. This program encourages partnerships between colleges and high schools to allow students, especially those who would be first-generation college-goers, to take college courses and career-based classes. [Designation under this program](#) is performed by the Department of Higher Education and the Department of Elementary and Secondary Education. Applications must be presented jointly by a Massachusetts institution of higher education and a Massachusetts K-12 partner, with a planned program for students from the K-12 partner to receive college credit at the higher education institution. The partnership is voluntary. The two partner institutions are responsible for developing a programmatic model and a funding structure, though programs receive grant funding and support from the state once they are designated as Early College programs. As of April 2020, there are 15 [designated early college programs](#), which the state projects to educate about 2,280 students in the 2019-2020 school year.

Many Massachusetts students also earn college credits through the Advanced Placement program. Advanced Placement courses, a program of the College Board, are offered in a variety of subjects and culminate in an examination on which students are scored 1-5. Many public and private colleges and universities accept scores of 3 and above on these exams for course credit. A public-private [partnership](#) between the state and Mass Insight Education supports more than 80 high schools each year to expand Advanced Placement offerings, to support teacher development, and to encourage student participation, especially for students from historically underserved demographics.

In Massachusetts, students need to achieve a minimum score of 3 or 4 to qualify for credit at public colleges and universities; as of April 2020, each academic department at each public college determines which score is required for credit. [Nearly half](#) of all students in Massachusetts' 2019 high-school graduating cohort took at least one Advanced Placement exam, and in 2020, Massachusetts was the nation's [top state](#) for scores 3 and above. It is also the state that has seen the greatest improvement in AP scores over the past decade.

NATIONAL CONTEXT

In 2002, the Bill and Melinda Gates Foundation launched the [Early College High School Initiative](#). Students can earn an associate's degree or up to two years of credit toward their bachelor's degree. The design of these schools varies widely and overall, and more research is required to designate the most effective implementation models.

STATE OF RESEARCH

Research shows numerous positive effects of Early College Programs. According to a [2013 study](#) by the American Research Institute, early college students are more likely to graduate from high school, to enroll in college, and to gain a college degree. In addition, students enrolled in early college have better attendance. These programs were shown to be particularly beneficial for traditionally underserved groups.

In 2019, Education Reform Now and the Alliance for Excellent Education released a [report](#) summarizing research on early college programs, concluding that the programs show promise in boosting student achievement and increasing higher education access.

MORE INFORMATION

On Massachusetts' Early College Initiative:

- ["Massachusetts Early College Initiative,"](#) Massachusetts Department of Higher Education.
- ["Early College Blueprint: A Guide to Getting Started with Early College in Massachusetts."](#) The Rennie Center. [Report](#). 2019.
- Massachusetts Department of Higher Education & Massachusetts Department of Elementary and Secondary Education. ["Early College Designation Process and Criteria."](#) 2017.

On Impact of Early College:

- Berger, Andrea. ["Early College Impact Report."](#) American Institutes for Research. 2013.
- Hoffman, Nancy & Joel Vargas. ["Policy Maker's Guide for Designing Early Colleges."](#) Jobs for the Future 2010.
- Dannenberg, Michael & Anne Hyslop. ["Building a Fast Track to College."](#) Education Reform Now & Alliance for Excellent Education. 2019.

On Design of Early College:

- Ndiaye, Wolfe. ["Early college can boost college success rates for low-income, first-generation students."](#) *Phi Delta Kappan*. 2016.

SECTION 15

SCHOOL CHOICE PROGRAM

OVERVIEW

The Massachusetts inter-district school choice program gives parents the option to send their children to schools other than those in their home districts. This is an opt-out program, meaning districts with seats available must allow non-resident students to enroll unless those districts opt out.

HOW IT WORKS

Massachusetts first [passed](#) an inter-district school choice law in 1991, allowing students to enroll in traditional school districts other than the district in which they reside.

All districts are [presumed](#) by the state to participate in the program, meaning that districts are by default open to enrollment from out-of-district students. A district can opt out of the program if its “school committee holds a public hearing on this issue and then votes to withdraw from the school choice program” prior to June 1. This decision must be renewed annually as it expires after each school year.

Regarding the selection of students, there must be no discrimination of any kind in the choice of who is allowed to switch districts. If there are only enough seats available in the receiving district to accommodate some of the presumptive students, the receiving district must hold a lottery to select the incoming students. Other restrictions include the state regulation that not more than 2% of Massachusetts public school students may participate in the program in a given year, and that students participating in the school choice program are not eligible to receive transportation, which means in practice that the program is limited to those students whose families can drive their children to school.

In the 2018-2019 school year, 17,327 students [participated](#) in the school choice program, constituting just under the 2% cap of all students in the state.

Once a student is selected for school choice, the sending district pays \$5,000 per student to the receiving district to finance the student’s tuition. This is a capped amount by state statute

and is significantly lower than the average statewide per pupil [expenditure](#) of \$15,911 per year. This \$5,000 is unchanged, in absolute dollar terms, from the program's inception in 1996; the cumulative rate of inflation over that period is 64.5%. According to the [Department of Elementary and Secondary Education](#), the state treasurer deducts school choice tuition from the sending district's chapter 70 aid; if there is not enough chapter 70 funding to cover the full cost, the treasurer "deducts the remaining tuition from other state aid appropriated for the sending district."

NATIONAL CONTEXT

According to the Education Commission of the States, 47 states and the District of Columbia have programs similar to Massachusetts' inter-district school choice program. In some states, these programs are voluntary (as in Massachusetts, where districts may opt out), while others have mandatory inter-district school choice. Some state programs include provisions that a student may be barred from choosing a particular school or district if that choice would interfere with a state's desegregation plan. Details about inter-district school choice programs in each state may be found on the Education Commission of the States' [website](#).

MORE INFORMATION

On inter-district school choice in Massachusetts:

- ["School choice opens options beyond district schools,"](#) WBUR.
- ["School choice,"](#) Massachusetts Department of Elementary and Secondary Education.

On inter-district school choice in a national context:

- ["The potential of interdistrict school choice,"](#) Richard D. Kahlenberg, *EdWeek*.

SECTION 16

CHARTER PUBLIC SCHOOLS

OVERVIEW

Charter public schools in Massachusetts are independently-run public schools that operate under five-year charters approved and monitored by the Commonwealth's Board of Elementary and Secondary Education. In Massachusetts, charter public schools are tuition-free and must operate as nonprofit organizations. They must not admit students based on selection criteria, but rather must use random lotteries, though preference is given to siblings of current students. They also maintain waitlists when there are more applicants than seats, which is common given the high demand for seats in nearly all charter schools in the state. Numerous studies have demonstrated a record of success for charter public schools in the Commonwealth, especially for students from historically underserved populations.

IN MASSACHUSETTS

Charter schools were first authorized in Massachusetts under the Education Reform Act of 1993. There are two kinds of charter schools in Massachusetts: Commonwealth charter schools, which operate independently from surrounding districts, and Horace Mann charter schools, which operate as part of a district but with high levels of autonomy. A comparison of Horace Mann and Commonwealth charter schools may be found [at the Department of Elementary and Secondary Education's website](#).

All charter schools in Massachusetts are public schools. They are free of charge, meaning they may not charge tuition; they may not use a selective admission process; instead they must use a random lottery when the number of applicants exceeds the number of seats available in a given school; and they are governed by nonprofit boards chartered by the state's Board of Elementary and Secondary Education ("BESE").

Charter public schools are accountable to BESE throughout their operation. Each charter school must undergo a renewal process at least once each five years, during which BESE assesses its academic success, viability, and faithfulness to the terms of its charter. BESE may choose to renew a charter without reservations, place a school on probation, or close a school for poor

performance. If the state finds that the charter school is doing well, the school may continue to serve students or even expand, should it choose to apply to do so.

FUNDING AND THE CAP

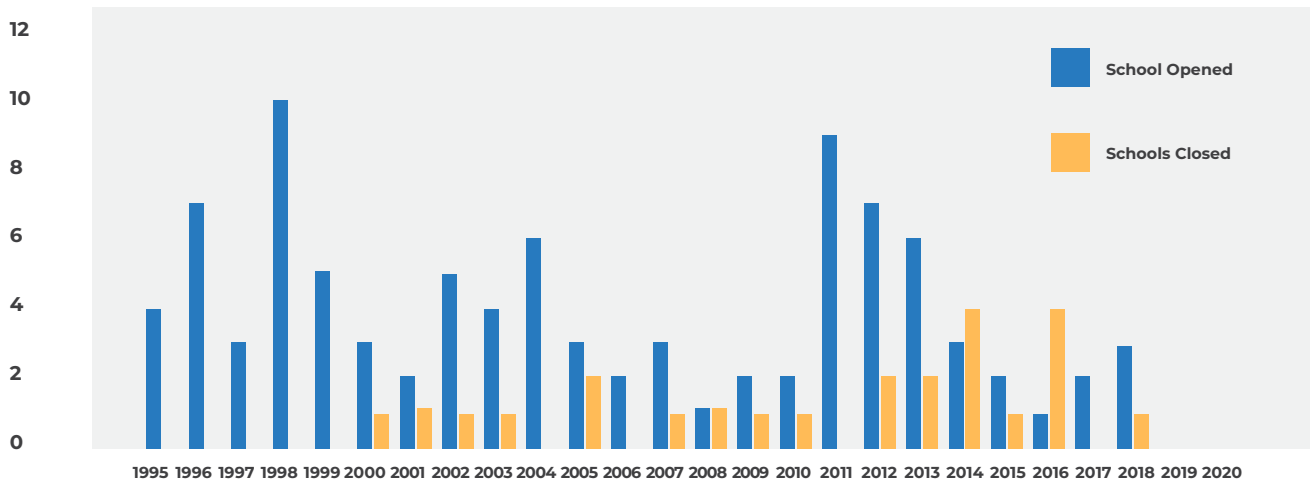
As with all public schools in Massachusetts, students in charter public schools are guaranteed a minimum level of spending per pupil. As a matter of accounting, the Commonwealth stipulates that this money flows through the district in which a student resides (the sending district).

By way of a somewhat simplified example: if Town X's per pupil spending is \$15,000 per student and Student A (a Town X resident) attends a Commonwealth charter school, Town X would send \$15,000 to the charter school to cover the cost of educating Student A. The state provides transitional aid, also known as "tuition reimbursement," to the sending district to help it adjust to decreased enrollment when students choose charter schools. During the course of a three-year phase-in starting in 2021, this transitional aid amounts to 200% over 3 years. This budget line has often been under-funded, but even at half-funding is a [national outlier](#).

The state's original charter school law included a limit on the number of charter schools. This limit, or "cap," has changed several times since its inception, but it consists of the following provisions:

- 120 charter schools may operate in the Commonwealth, of which not more than 48 may be Horace Mann schools. As of the 2019-2020 school year, there are 74 Commonwealth charter schools and seven Horace Mann charter schools.
- Of the 112 charters granted by the Department of Elementary and Secondary Education since 1994, 31 schools have closed or never opened. Of those that closed, 24 did so in the context of the state's accountability system for charter schools.
- For most districts, up to 9% of net school spending may go to Commonwealth charter schools, which roughly means that 9% of the district's students may attend charter schools.
- That net school spending figure [rises](#) to 18% for "school districts ranked in the lowest 10 percent of all statewide student performance scores based on the MCAS results from the two most recent school years."
- Students attending charter schools may make up no more than 4% of the total number of students attending public schools in Massachusetts
- As of May 2020, [some districts](#) have reached the net school funding cap (such as Everett, Lynn, and Salem) or are expected to reach it soon.

Public Charter School Openings and Closures



DEMOGRAPHICS AND RESULTS

In Massachusetts, charter public schools are, on the whole, demographically similar to their surrounding districts. They serve similar populations of students of color, students from low-income backgrounds, and English learners. In the early years of charter school operation in Massachusetts, charter schools tended to enroll a much smaller percentage of students with disabilities than sending districts. The state legislature addressed this concern in its 2010 *Act Relative to the Achievement Gap*, which required charter schools to develop recruitment and retention plans for students with disabilities, among other populations. Since then, the figure has come much closer to the level of sending districts.

As of July 2020, special education [enrollment](#) in charter schools is only slightly lower than the state average (15.5% to 18.4%) while the percentage of English learners in charters is higher than the statewide average (13.5% to 10.8%). The percentage of economically disadvantaged students has similarly risen and is now substantially higher than the state average (43.3% to 32.8%).

In terms of academic results, Massachusetts charter schools consistently outperform surrounding school districts, with especially strong performance for students of color and students from low-income backgrounds. In Boston, for example, one year in a charter school [closes](#) roughly $\frac{1}{3}$ of the racial achievement gap. More information on results can be found below under the “State of Research” heading in this section.

NATIONAL CONTEXT

Charter schools differ significantly across the country. Their legal status, structure, level of accountability, requirements of nonprofit status, and relationship to state laws governing traditional districts are all variable. Outcomes also vary significantly.

Generally, charter schools tend to provide better outcomes for students in places where they are accountable to a strong authorizer (the body that gives the school its charter), operate as a nonprofit, and focus on serving students in high-poverty areas. Urban charter schools tend to have stronger records of performance than other charter schools.

A 2019 review of charter school studies from the Annenberg Center at Brown University [found](#) that, nationwide, “charter schools are having a positive effect for some students for some outcomes in some locations.” Research does not support drawing generalized conclusions about charter schools absent the context of a given state’s charter school policies and charter school sector.

STATE OF RESEARCH

Research shows that charter schools in Massachusetts offer positive results and higher success rates for students than their peers in many districts. This is especially true in urban areas. A 2011 [study from Harvard’s Center for Education Policy](#) compared academic outcomes for Massachusetts charter students with those of students who entered a charter school lottery but were not admitted, finding that charter school attendance led to stronger math and English language arts performance among high school students, as well as stronger math performance among middle school students. A 2013 [study from Stanford’s Center for Research on Education Outcomes](#) (CREDO) found that “on average that students in Massachusetts charter schools make larger learning gains in both reading and mathematics.” A 2016 [Brookings Institution report](#) found that “one year in a Boston charter [...] erases roughly a third of the racial achievement gap.”

Research also suggests that Massachusetts charter schools do not have a net negative impact on the educational quality of traditional school districts, and that charter school expansion has corresponded to improved charter school quality in Massachusetts. The National Bureau of Education Research found in a [2019 report](#) that “replication charter schools generate large achievement gains on par with those produced by their parent campuses.” What’s more, the study found that Boston’s charter school sector grew *more* effective after expansion.

Nationally, the evidence on charter school effectiveness is less straightforward. Stanford’s CREDO [found in 2013](#) that the strength of charter school sectors varies widely across the country, with some state charter school sectors showing larger gains in math and reading than others. Charter school sectors, as this evidence suggests, differ by state in both their regulatory form and their results. Massachusetts has among the highest-performing charter schools in the country.

MORE INFORMATION

More on charter schools in Massachusetts:

- Massachusetts Department of Elementary and Secondary Education. "About Charter Schools." [Website](#).
- Massachusetts Department of Elementary and Secondary Education. "Comparison of Innovation Schools, Pilot Schools, Horace Mann Charter Schools, and Commonwealth Charter Schools in Massachusetts." [White Paper](#), 2016.

More on student performance in charter schools:

- Stanford CREDO [study](#), 2013:
- Harvard CEPR "Lottery Losers" [study](#), 2011.
- Angrist, J. D., S. Cohodes, S. Dynarski, P. A. Pathak, and C. R. Walters (2016a). Stand and deliver: Effects of boston's charter high schools on college preparation, entry, and choice.
- Journal of Labor Economics 34(2), 275–318. [Study](#).
- Kane, Thomas. Harvard Graduate School of Education. "Let the Numbers Have Their Say: Evidence on Massachusetts' Charter Schools." 2016.
- Cohodes, Sarah & Susan Dynarski, Brookings Institutions [Report](#), "MA Charter Cap Holds Back Disadvantaged Students." 2016
- Candal, Cara Stillings. Pioneer Institute, "MA Charter Schools serving English Language Learners" [White Paper](#), 2017.

More on the effects of charter school expansion in Massachusetts:

- Cohodes, Sarah, Elizabeth Setren, and Christopher Walters. National Bureau of Education Research. "Can Successful Schools Replicate? Scaling Up Boston's Charter School Sector." [Study](#), 2019.

SECTION 17

ADULT EDUCATION

OVERVIEW

While many students graduate from high school at age 18, some students take longer to complete their K-12 education, whether because they have been held back or have dropped out and then returned to school, among other reasons. Public school districts [must educate students up to the age of 22](#) or diploma completion, whichever occurs first; they are free, however, to increase that limit. Students who “age out” of traditional high schools but still wish to pursue their K-12 education transition to the **adult education** system, which is a unit of the Department of Elementary and Secondary Education.

IN MASSACHUSETTS

Adult education is operated under DESE’s [Adult and Community Learning Services](#) unit, which covers “a range of educational services for adults from basic literacy (including English for non-native speakers), numeracy, and high school equivalency / adult diploma programs (ADP).” The [staff](#), employed directly by DESE, aid adult learners to achieve academic goals including English proficiency and high school equivalent diploma programs.

Consistent with federal regulations, Massachusetts measures adult learners’ academic progress using a set of standards called the [Measurable Skills Gains \(MSG\) Standards](#). These standards lead toward English proficiency, high school-equivalent credentials, or enrollment in post-secondary education or training.

NATIONAL CONTEXT

On the federal level, adult education falls under the [Department of Education’s Office of Career, Technical, and Adult Education](#) (OCTAE), which provides resources, support, and grant funding to states for adult education programs. States must report data on student achievement to OCTAE, and the federal Department of Education mandates that states use “valid and reliable assessments” to gauge and report student’s attainment of progress levels.

STATE OF RESEARCH

Studies of adult education programs show a wide variety in both program structures and results nationwide. A [series of studies](#) from the American Institutes for Research found that relatively few studies have examined postsecondary transitions for adult learners, and that teacher quality is both variable and highly important to student success. A 2007 [study released by ETS](#) found that completing adult education programs can provide increased opportunity and economic stability, but that program results vary. The ETS study found that the average adult learner gains less than 100 hours of instruction per year, with only a third of learners in that category gaining at least one educational level.

MORE INFORMATION

On adult education nationally:

- Yin, Michele and Stephanie M. Cronen. "Studying Teacher Effectiveness in Adult Education." American Institutes for Research. [Series of Studies](#). 2015.
- Tamassia, Claudia et al. "Adult Education in America: A First Look at Results from the Adult Education Program and Learner Surveys." ETS. [Report](#). 2007.

SECTION 18

RECOVERY HIGH SCHOOLS

OVERVIEW

[Recovery high schools](#) are four-year, diploma granting high schools designed to concurrently provide academic instruction and recovery services for students who have experienced drug and alcohol abuse issues. These schools are meant to help students achieve their academic goals and graduate from high school while also providing for their specific health needs.

IN MASSACHUSETTS

There are [five recovery high schools](#) in Massachusetts as of [2020](#). The schools are [operated](#) by traditional school districts or education collaboratives. The district is [responsible for funding](#) a recovery high school at a per pupil spending rate equivalent to the state's average. In addition, the schools receive funding through the state's Department of Public Health, which cooperates closely with districts in the development and operation of recovery high school programs. The schools are subject to the same DESE data reporting and accountability requirements as all other Massachusetts public schools, and they must report data to the state Department of Public Health on each student's recovery from substance addiction.

NATIONAL CONTEXT

The first recovery high school opened in Minnesota in 1989. As of December 2019, the American Addiction Centers [reported](#) that 25 recovery high schools operate across eight states. The schools tend to have small enrollment and highly structured, individualized programs. The schools provide an [alternate path of return](#) to academic success for students returning to sobriety; while eight of ten such students who return to their previous school relapse within a year, recovery high schools have a stronger record of success.

STATE OF RESEARCH

While the research bank on recovery schools is not especially large, it suggests that the schools have a highly beneficial impact on the health and academic outcomes of their students. [A 2018 study](#) by Andrew J. Finch et al found that recovery high school students in Minnesota, Wisconsin, and Texas were more likely than students not in recovery high schools to report “complete abstinence” from several controlled substances. [A 2008 study](#) by D. Paul Moberg and Andrew J. Finch also found a “significant reduction in substance abuse” among students enrolled in recovery high schools, as well as highly positive student assessments of the schools’ “therapeutic value,” but less so regarding the school’s educational programming.

MORE INFORMATION

On recovery high schools in Massachusetts:

- Organization website, Massachusetts Recovery High Schools. massrecoveryhs.org/home
- Massachusetts General Laws, Title XII, Chapter 71, Section 91: “[Recovery High Schools.](#)”
- Pohle, Allison. “Funding Complexities Remain for Mass. Drug Recovery High Schools.” WBUR. April 9, 2018. [Article.](#)

On recovery high schools nationwide:

- Finch, Andrew J. et al. “Recovery High Schools: Effects of Schools Supporting Recovery from Substance Abuse Disorders.” *The American Journal of Drug and Alcohol Abuse.* 2018. [Study.](#)
- Moberg, D. Paul & Andrew J. Finch. “Recovery High Schools: A Descriptive Study of School Programs and Students.” *Journal of Groups in Addiction and Recovery.* 2008. [Study.](#)
- Seay, Nikki. “Are Recovery High Schools Really Working?” *Recovery.org: An American Addiction Centers Resource.* 2019. [Article.](#)

INDIVIDUALIZED PROGRAMS AND CURRICULAR INTERVENTIONS

SECTION 19

SPECIAL EDUCATION

OVERVIEW

Special education is an alternative form of schooling for students with disabilities as defined by Massachusetts law, chapter 71B. All students have the right to academic programming that fits their needs, under both state law and the federal Individuals with Disabilities Act (IDEA), which was modeled on Massachusetts special education law. Schools must provide special education services to students who need them, though in cases where districts cannot reasonably provide a specific, needed service, they may fulfill this duty by providing for the student to attend a school where such services are provided.

IN MASSACHUSETTS

As of 2020, over 175,000 Massachusetts students have disabilities as defined by the Department of Elementary and Secondary Education. Students with disabilities thus constitute 18.4% of the state's public school student population.

In Massachusetts, each school district is responsible for identifying and assessing students who may require special education services. Parents, caretakers, and other adults working with a given child may also make a referral for special education services, though the district must obtain parental consent to assess the child or else sue for due process. If a district's evaluation team decides that a student requires special education services, it will draft an Individualized Education Program (IEP) that describes what services the student needs. The document is updated at least once per year, with additional documentation on educational goals required after the child turns 16 years old. The IEP can specify more frequent updates, and parents/guardians can require it to be updated as frequently as they desire. If a school cannot provide these services, an out-of-district placement can be made or parents may file for their child to be placed in a private school that can offer services at no cost to the family.

Students with disabilities who do *not* qualify for an IEP may instead qualify for a "504 plan," named for Section 504 of the federal Rehabilitation Act of 1973, which outlines how the district will support the student and remove barriers to the student's education. A 504 plan is subject to less stringent regulations than an IEP.

Funding for special education programming comes from four sources: city or town funding, federal IDEA grants, state chapter 70 funds (special education is a population category receiving additional funding), and state Circuit Breaker funding. The Circuit Breaker reimbursement program, established in 2004, provides funds to a school if spending for special education exceeds four times the state foundational average per pupil, with the goal of reimbursing the school for 75% of costs above that threshold. The 2019 Student Opportunity Act, which updated the Foundation Budget by which state aid to districts is calculated, specifically targeted special education as one spending area for increased funding. Over a four-year period, the SOA also [expands](#) circuit breaker funding to include out-of-district education costs associated with fulfilling students' IEPs.

Massachusetts districts sometimes provide special education services through [collaboratives](#), which are [educational agencies](#) formed by agreement of two or more districts. In special education collaboratives, the participating districts partner to provide services that any individual district may not be able to provide on its own. Through a memorandum of understanding, they agree to share costs and offer joint programs in a regional partnership. [The Education Cooperative \(TEC\)](#), for example, is a cooperative serving 16 local school districts in the greater Boston area; it provides separate, special education campuses, therapeutic curricula for students with social/emotional needs, and transitional services aimed at helping students succeed in post-K-12 life.

Even with the Circuit Breaker program, special education can constitute a significant expense to districts. This is especially true in cases where students must be placed in state-approved private educational settings that are able to provide necessary services. Because the district is responsible for expenses relating to its students' education, even a small number of such placements can place a strain on district finances.

MORE INFORMATION

On special education in Massachusetts:

- Special Education [website](#), Massachusetts Department of Elementary and Secondary Education.
- "[A Parent's Guide to Special Education](#)." Federation for Children with Special Needs.

SECTION 20

ENGLISH LEARNERS & BILINGUAL EDUCATION

OVERVIEW

Both nationally and in Massachusetts, schools have seen a profound increase in the number of English learners in recent decades. This growing linguistic diversity is one of most salient demographic trends in Massachusetts, and it requires new resources and practices to educate all children.

As the number of English learners (ELs) in Massachusetts expands, the debate about how to educate them has grown as well.

IN MASSACHUSETTS

As of the 2019-2020 school year, 23% of Massachusetts students speak a language other than English as their first language, up from 12% in 1994. In some districts, the figure is much higher: 72% in Lawrence, 84% in Chelsea, and 49% in Boston. This linguistic diversity has increased the level of need in many districts for English learner education, and enhanced funding for districts with larger numbers of English learners was a major component of the 2019 Student Opportunity Act.

Massachusetts relies on two distinct practices for English learner education, sheltered English immersion (SEI) and bilingual education.

In SEI, English learners are taught academic content in English, often in the same classrooms as native English speakers. Through Massachusetts' Rethinking Equity and Teaching for English Language Learners (RETELL) program, all core academic teachers who teach English learners must obtain a SEI Endorsement demonstrating their competency in SEI. These endorsements can be obtained through multiple pathways, including SEI Endorsement courses, an SEI MTEL, and possession of an English as a Second Language license. Administrators who supervise teachers of English learners must also obtain an SEI Endorsement.

The second approach, bilingual education, was instituted through the 2017 [Language Opportunity for Our Kids \(LOOK\) Act](#). In bilingual education, English learners may be taught academic subjects in their native languages while simultaneously learning English. In line with

this practice, the LOOK Act allows districts to develop language acquisition plans for English learners incorporating instruction in their native language. The law also provides greater parent/guardian input in students' language acquisition programs, requires that districts verify that each educator in a given English acquisition program is qualified for that program, and requires DESE to establish benchmarks for English language proficiency. It furthermore directs the Board of Elementary and Secondary Education to establish a [State Seal of Biliteracy](#), which districts may award to students who demonstrate “a high level of proficiency in English and at least one other language.”

From 2002 until the LOOK Act, SEI was the only approach to English learner education permitted in Massachusetts. This was due to a 2002 English-only ballot question that banned schools from practicing bilingual education and required all students to be taught entirely in English. The ballot question was part of a nationwide effort, though Massachusetts was one of a handful of states to implement English-only laws. That 2002 law was repealed by the LOOK Act, allowing districts greater flexibility in choosing their approach to English learner education.

NATIONAL CONTEXT

As in Massachusetts, the nation as a whole has seen a growing population of students whose first language is not English. The U.S. Department of Education's [Office of English Language Acquisition](#) administers grant programs, conducts research on English learner education, and disseminates information to inform policy decisions in the states.

In 1968, President Lyndon B. Johnson signed the Bilingual Education Act, which provides federal funds through competitive grants to districts for the establishment of bilingual education programs. However, bilingual schools are still a center of discussion and debate. With many students who are not native English speakers, the U.S has had to adjust its schools and instruction to reflect this growing population.

A major challenge is a shortage of qualified EL and bilingual teachers. The American Federation of Teachers estimates that nationally as of 2015 less than [3% of students](#) in grades K-8 received bilingual education.

STATE OF RESEARCH

There is a variety of research available on English learner education. One of the most consistent findings throughout this scholarship is that bilingual instruction benefits all students, including those who are native English speakers. The research compares multiple styles of integrating bilingual instruction and the possible economic and social benefits of doing so. It also examines the racial implications of the bilingual debate and the role of evaluation in strengthening programs.

MORE INFORMATION

On English learner education in Massachusetts:

- “LOOK Act.” Massachusetts Department of Elementary and Secondary Education. “LOOK Act.” [Website](#).
- “Massachusetts Vision and Blueprint for English Learner Success.” Massachusetts Department of Elementary and Secondary Education. [Website](#).
- “Rethinking Equity and Teaching for English Language Learners (RETELL).” Massachusetts Department of Elementary and Secondary Education. [Website](#).
- “Sheltered English Immersion Endorsements (SEI).” Massachusetts Department of Elementary and Secondary Education. [Website](#).
- Jones, Colin. “Excellence for All: Supporting English Language Learners in Massachusetts.” Massachusetts Budget and Policy Center. [Report](#).

On methods of English learner education:

- Bialystok, Ellen. “Effects and consequences of Bilingual Education.” *International Journal of Bilingual Education and Bilingualism*, 2016. [Review](#)
- Sanchez, María Teresa (Maite) Sánchez. “Historical Review of bilingual education policies and dual-language policy development.” *Journal of the National Association for Bilingual Education*, 2018. [Review](#).

SECTION 21

SOCIAL & EMOTIONAL LEARNING

OVERVIEW

Social and Emotional Learning (SEL) refers to teaching behavioral, mental, and emotional management within schools and academic contexts. The goals of these lessons include managing emotions, making responsible decisions, and strengthening relationship building. There is no one universal definition for Social and Emotional Learning nor one form of implementation to achieve its multiple positive effects.

IN MASSACHUSETTS

Massachusetts was one of eight states accepted into the Collaborative for Academic Social and Emotional Learning (CASEL) in 2016. The Department of Elementary and Secondary Education (DESE) has identified social and emotional learning as one of its five strategic priorities. This topic continues to be a point of conversation in policy circles as more schools and districts determine how to prepare staff for helping an increasing percentage of students who have experienced trauma or may be categorized as high need. Districts can adopt SEL lesson plans and program designs provided directly by CASEL and available on the DESE [website](#).

A key element of DESE's efforts in SEL is its focus on "Safe and Supportive Schools," which includes [a suite of programs and resources](#) on ensuring that all students feel safe and supported in their learning environment. Resources provided by DESE include information on cultural inclusion, emergency management, LGBT inclusion, and suicide awareness. [Trauma-Sensitive School practices](#) are a subset of Safe and Supportive School practices focused on ensuring that districts, schools, and staff are prepared to address the academic and social-emotional needs of students who have experienced trauma.

DESE also provides a self-reflection [tool](#) districts can use to identify avenues for becoming more safe and supportive to students. The document follows frameworks established by the Safe and Supportive School Commission, co-chaired by the Commissioner of Elementary and Secondary Education. The Commission also identifies potential improvements in schools' and districts' access to social-emotional resources and seeks federal funding for its Safe and Supportive Schools programs, [among other duties](#).

A DESE grant program, funded by a state budget line item, provides funds to districts that develop action plans based on the Safe and Supportive Schools self-reflection tool. In FY2019, \$369,864 was allocated to [30 districts](#) across the Commonwealth.

Programs supporting non-academic needs that influence a student's well-being and academic performance are often called [wraparound services](#). Such services are integrated into schools while supporting students and often their families in a holistic manner. Wraparound services may include social-emotional programs, mental and behavioral health professionals, dental and/or medical care, support for nutrition and wellness, and support for students' families, such as adult education. Through funding secured through the Obama administration's Race to the Top competitive grant program, Massachusetts was able to implement Wraparound Zones in several Massachusetts districts. An [evaluation](#) of the programs by the American Institutes for Research found that students in WAZ programs saw improvements in academic achievement.

Massachusetts does not require schools to employ social workers, though it does require that any social worker working in a Massachusetts school have a Master's degree in Social Work or Counseling and a passing score on the Communication and Literacy Skills test.

NATIONAL CONTEXT

Social emotional learning is largely determined at the state level. Each state applies the concepts in its own way. To make these integrations more consistent and measurable, CASEL created a [set of best practices](#) after assessing the success of hundreds of SEL programs. This acts as a guideline that other states can design programs from, as Massachusetts has done.

School social workers are a popular strategy for incorporating wraparound services into school settings. According to [the National Association of Social Workers](#), school social workers are responsible for intervention on three levels: school-wide prevention programs and practices; small-group, short-term interventions to improve early academic and social-emotional engagement to reduce problem behavior; and individual long-term interventions for students with serious academic, behavioral, or social-emotional problems that constitute a chronic condition.

STATE OF RESEARCH

Research and analysis from [Child Development](#), the [Rennie Center](#), the [American Institutes for Research](#), and others shows that implementation of social and emotional learning strategies has multiple positive effects: improving student performance, better classroom behavior, and an increased ability to manage stress and depression.

According to [CASEL](#), when compared with students in schools without SEL programming, 57% of SEL students improved their skills in communication and confidence. Research also shows these effects to be long-lasting, affecting students for up to 18 years after their participation in

SEL programs. Beyond students, SEL implementation has economic benefits with an \$11 return for every \$1 dollar spent on SEL.

MORE INFORMATION

On SEL Design and Impact:

- Durlak, Joseph A. et al. "School-based Meta-Analysis: Impact of Enhancing SEL" *Child Development*. 2011. [Article](#)
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SECTION 22

CIVICS EDUCATION

OVERVIEW

Civics knowledge is low nationwide, and some advocates believe that mandatory civics education in K-12 schools would improve civic awareness and participation. Potential applications include mandated courses, standardized assessments, and graduation requirements. Massachusetts has civics standards and requires students to complete at least one civics-related project during high school, but does not require students to pass a civics exam in order to graduate.

IN MASSACHUSETTS

In the wake of the 2016 election and continued low voter turnout, “[An Act to Promote and Enhance Civic Engagement](#)” was signed into law in November 2018. The law aims to increase the use of civics education to “advance civil discourse among students.” It requires Massachusetts public high schools and school districts serving eighth-grade students to provide at least one student-led, non-partisan civics project for each student. The project may be completed individually or in groups and must be relevant to local or national civics issues. The law also includes new requirements for civics curricula, including mandated coverage of the Bill of Rights, the responsibilities of citizens, and issues of diversity and power structures. It further establishes a Civics Project Trust Fund to assist underserved communities in achieving the state’s requirements; as of January 2020, 28 [grants](#) have been issued.

In addition, the Department of Elementary and Secondary Education has formed a non-partisan program for high schoolers to help them pre-register as voters.

NATIONAL CONTEXT

Civics knowledge among school-aged students is low nationwide, and there is a wide [variation](#) in each state’s requirements for civics education. While most states require a civics course, fewer have a full civics curriculum, and many require only a half-year course. Less than half of states require students to pass a civics exam in order to graduate from high school.

STATE OF RESEARCH

A series of national surveys beginning in 2016 found national civics knowledge to be at an all-time low, with only 26% of Americans able to name all three branches of government in 2017. This lack of civics knowledge is paired with diminished trust in government, with Pew Research finding that the percentage of Americans who trust in government has fallen steadily in recent decades, reaching a low of 17% in 2019. Research has shown that youth are engaging in activism and social movements at record levels yet, only 24% of eighth-graders scored at or above “proficient” on the 2018 civics section of the National Assessment of Educational Progress (NAEP).

MORE INFORMATION

Insights on Value of Civic Education:

- Sawchuk, Stephen. “10 Core Insights on Civics Education, and How to Improve It.” *Education Week - Teaching Now*. Accessed November 20, 2019. http://blogs.edweek.org/teachers/teaching_now/2019/11/10_core_insights_on_civics_education_and_how_to_improve_it.html?cmp=SOC-SHR-FB.
- David E. Campbell (2019) “What Social Scientists Have Learned About Civic Education: A Review of the Literature.” *Peabody Journal of Education*, 94:1, 32-47, DOI: [10.1080/0161956X.2019.1553601](https://doi.org/10.1080/0161956X.2019.1553601)
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On the Current State of Civic Education in U.S:

- “Civics Survey Report” *Education Week* 2018. <https://www.edweek.org/media/civics-survey-report-education-week.pdf>.
- Shapiro, Sarah & Catherine Brown. “The State of Civics Education.” Center for American Progress. 2018. <https://files.eric.ed.gov/fulltext/ED586237.pdf>.

SECTION 23

PERSONALIZED LEARNING



OVERVIEW

Personalized learning (PL) refers to strategies that personalize instruction. The goal is to tailor instruction to the needs of each individual student, meeting them where they are to optimize the interaction among teacher, student, and content.

As schools, districts, and governing bodies around the country have come to realize the differing needs of a diversifying student body, greater attention has been paid to the necessity for more tailored approaches beyond one-size-fits-all classroom instruction. Technology is often used to aid in personalization, but is neither necessary nor sufficient for personalized learning. While many PL strategies use technology, others do not.

HOW IT WORKS

A wide array of interventions fall within the category of personalized learning. These include:

-  **RESPONSIVE ASSESSMENT:** Assessments that become more or less difficult in real time according to a student's performance. These assessments can provide a fine-tuned account of a student's needs and optimal learning path.
-  **COMPETENCY-BASED LEARNING:** Instead of (or in addition to) a traditional system of matriculation from one grade to the next, competency-based programs require students to demonstrate competence in a particular skill (e.g., fractions or analyzing complex arguments) before moving on to the next skill in a given "tree." This kind of learning often involves a large amount of independent work because each student is progressing at his or her own pace; in some places, such as New Hampshire, competency-based approaches [have been modified](#) such that classes advance together.

- ➔ **BLENDED LEARNING:** Students learn some material on their own, for example online, and [spend some time](#) in teacher-led instruction. One style of blended learning is the flipped classroom, in which students learn about a given topic online as homework, and then practice it in the classroom. A student might read about World War II and then have a class discussion the next day, rather than hearing a lecture on World War II in the classroom and then answering questions for homework. This method falls under PL in that students first encounter lesson content independently.
- ➔ **PERSONALIZED EDUCATION PLANS:** For each student, teachers create an individualized instruction plan based on that student's needs. Similar to Individualized Education Programs (IEPs) for students with disabilities, this practice encourages teachers to take individual learning paths into consideration when constructing their overall lesson plans.
- ➔ **STUDENT-DRIVEN LEARNING:** Allows students greater choice in their learning path, including what topics to pursue, which classes to take, and/or when to move from one level to the next. In some ways, student-driven learning resembles the [Montessori Method](#). One avenue for this method is project-based learning, in which students learn concepts through self-directed projects, either individually or in groups. These projects often involve concepts from multiple subject areas. After Westford Public Schools piloted project-based learning, students who participated [saw greater gains](#) on the MCAS in English language arts than those who did not and had equivalent gains in mathematics.

MORE INFORMATION

On Personalized Learning:

- Pane, John F. "[What Emerging Research Says about the Promise of Personalized Learning](#)." The Brookings Institution. 15 August 2017.
- Pane, John F et al. "Continued Promise: Promising Evidence on Personalized Learning." The Rand Corporation. 2015.
- García Mathewson, Tara. "[Project-based learning boosts student engagement, understanding](#)." *The Hechinger Report*. 8 May 2019.

EXPANDED LEARNING TIME

OVERVIEW

Expanded learning time (ELT) involves adding hours to the school day or days to the school year. Schools and districts use expanded learning time in various ways, including additional hours of regular instruction, small-group or one-on-one tutoring, enrichment programs, or intensive programs during school vacations. Massachusetts has seen multiple successful instances of expanded learning time, and research demonstrated positive results, especially for at-risk students.

IN MASSACHUSETTS

Massachusetts was an ELT pioneer in 2005, when the state [created](#) a budget line item to encourage districts to expand learning time, the Massachusetts Expanded Learning Time Initiative. The Commonwealth's program served as a model for the nationwide effort to expand learning time.

Massachusetts [encourages](#) schools and districts to employ expanded learning time. The state offers a [grant](#) to districts to implement such programs. Massachusetts has also seen successful instances of expanded learning time in districts such as the Lawrence Public Schools and charter public schools.

In Lawrence, expanded learning time was key to the turnaround plan for the district starting in 2011. Lawrence added over 200 instructional hours each school year in K-8 schools. The district also implemented "Acceleration Academies," intensive sessions for struggling students held during the February and April vacations. Research suggests that expanded learning time contributed significantly to Lawrence's improvements.

NATIONAL CONTEXT

Massachusetts—and especially Massachusetts charter schools—are a model for expanded learning time nationwide. Massachusetts was the first state to support expanded learning time in high-poverty schools. During the Obama administration, the Race to the Top initiative supported Massachusetts in strengthening this model, and other states in adopting similar ones. Several states, including New York, Tennessee, and Connecticut, now use both state and federal funds to [support](#) extended learning time.

STATE OF RESEARCH

Research on the impact of expanded learning time is generally positive, showing especially strong outcomes for students in underperforming and/or high-poverty school districts. Not all applications of expanded learning time are equal, however: research suggests that expanded learning time is most [effective](#) when the time is devoted to specific kinds of instruction, such as math and literacy coaching or experiential learning, and when it is led by certified teachers.

MORE INFORMATION

More on the benefits of expanded learning time:




- Barrett, Michael. “The Case for More School Days.” *The Atlantic*. Nov 1990.
- Kidron, Yael & Jim Lindsay. “The effects of increased learning time on student academic and nonacademic outcomes: Findings from a meta-analytic review.” American Institutes for Research. National Center for Educational Evaluation and Regional Assistance, U.S. Dept. of Education. July 2014.

APPENDIX

EDUCATION PERFORMANCE OVER TIME

Massachusetts' students and schools have made extraordinary progress since 1993, fueled by the essential combination of more funding, rigorous standards, and a strong accountability system, all while the state's demographics were changing. Massachusetts' education reform success shows that demographics are not necessarily destiny. At the same time, they show that opportunity gaps remain wide in the Commonwealth, requiring further effort toward equity.

MASSACHUSETTS' MODEL OF EDUCATION POLICY HAS YIELDED STRONG RESULTS FOR THE COMMONWEALTH.

-  **NATIONAL ACCLAIM FOR OUR TOP-RANKED EDUCATION SYSTEM.** In 1993, Massachusetts schools ranked in the middle of the pack nationally. Today, the Commonwealth has secured its place as the country's education leader.
-  **MASSACHUSETTS LEADS THE UNITED STATES ON THE NATION'S REPORT CARD.** The National Assessment of Educational Progress is the largest nationally representative and continuing assessment of what America's students know and can do in various subject areas. Massachusetts' Grade 4 and Grade 8 scores have increased in both reading and mathematics since 1998/2000, though its 2019 scores were lower than its 2017 scores. In 2019, Massachusetts outperformed all other states in 8th grade reading and math as well as in 4th grade reading, while only Minnesota outperformed Massachusetts in 4th grade math.
-  **THE STATE'S DROPOUT RATE DECREASED BY NEARLY 50%.** Between 1994 and 2019, the statewide annual dropout rate dropped from 3.7% to 1.8% (indicating that standardized tests do not cause students to drop out, as those opposed to the use of standardized tests assert).

-  **GRADUATION RATES ARE UP ACROSS THE BOARD.** Between 2006 and 2018, the state's four-year graduation rate rose steadily from 80% to 88%. This means about 5,971 students graduated in 2018 who *would not have graduated* under 2006's graduation rate. According to DESE, only about 800 students out of 74,000 (1%) in the 2016 cohort did not graduate because they failed MCAS.
-  **CITIES SEE EVEN GREATER GRADUATION RATE GAINS.** Improvements are even more marked in Gateway Cities and other urban centers over the same period. Boston, Chelsea, Holyoke, Springfield, Fall River, and Revere all saw their graduation rates rise by 25 percent or more since 2006.
-  **IN LAWRENCE, THE GRADUATION RATE HAS INCREASED BY MORE THAN 50% DURING STATE RECEIVERSHIP.** The city's graduation rate moved from 46.7% graduating in 2010 (the year before Lawrence went into state receivership) to 71.9% in 2018. Test scores are also up across the board, but especially for Latinx students. State intervention in Lawrence constitutes one of the Gov. Deval Patrick administration's most dramatic public policy successes.
-  **COMMONWEALTH PUBLIC CHARTER SCHOOLS PROVIDE A NATIONAL MODEL OF EXCELLENCE.** Two studies by Stanford University's Center for Research on Education Outcomes in 2013 and 2015 showed that Commonwealth public charter schools are accelerating the pace of learning at a rate not seen anywhere else in the country. A 2016 Brookings Institution study found that one year in a Boston charter school "erases roughly one third of the racial achievement gap."
-  **COMMONWEALTH PUBLIC CHARTER SCHOOLS CONSISTENTLY OUTPERFORM DISTRICT SCHOOLS.** Across the state, Commonwealth public charter schools are closing the achievement gap between low-income, African American, and Latinx children and more affluent, white children. After the first Commonwealth public charter school opened in 1995, demand by families has been so strong that Democrats in the legislature lifted the cap in 1997, 2000, and 2010.
-  **IMPROVEMENTS IN EDUCATION OUTCOMES OCCURRED AS THE STUDENT POPULATION GREW MORE DIVERSE.** In 1994, 79% of public school students in Massachusetts were white, 8% were black, 9% were Latinx, 4% were Asian, 12% did not speak English as their first language, and 24% were low-income. The demographics of students today are notably different: 59% are white, 9% are black, 21% are Latinx, 7% are Asian, 22% speak a language other than English as their first language, and 48% qualify as high needs.

The academic achievement of Massachusetts students has dramatically increased as the state has grown more diverse, educating increasingly larger numbers of children who have historically lagged behind their peers. At the same time, the persistence of opportunity gaps in Massachusetts points to the need for a renewed commitment to pursuing equity in the Commonwealth.

Demographics of Massachusetts Public Schools 1994 vs. 2019

