

*Educational Management
Audit Council*

*Office of Educational
Quality and Accountability*



2008 Annual Report



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Introduction and Recommendations

By statute, the Educational Management Audit Council (EMAC) is required to report on the activities and findings of the Office of Educational Quality and Accountability (EQA) each fiscal year. The following report discusses the operations of the EMAC and the EQA for fiscal year 2008.

In its *2007 Annual Report*, the EMAC made the following three recommendations, supported by evidence gathered by the EQA in its district reviews, which are presented here because they remain salient.

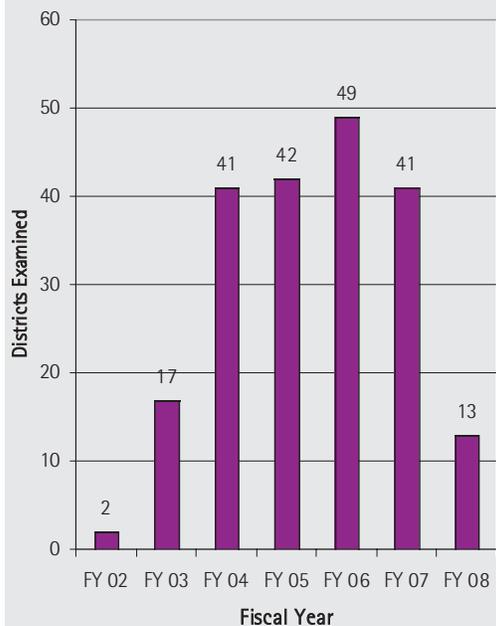
1. **It is time for the Legislature to revisit, update, and recalculate the components of the foundation budget and the resultant Chapter 70 aid formula.**
2. **The next frontier of reform is instruction. There is a great need for the state to examine the conditions of teaching and support effective instruction. Greater attention needs to be paid to the categorical funding of high quality professional development programs, initiatives for professional support, and capacity building for classroom teachers throughout the Commonwealth.**
3. **The state has too many school districts that lack the size, scale, and capacity to adequately address the requirements and expectations of Massachusetts' education reform. The Commonwealth must undertake a comprehensive effort to address the issue of viable size and appropriate scale to determine the best way to organize its public educational systems for maximum efficiency and effectiveness.**

What Is the EQA?

Test scores are the most widespread indicator the public uses to measure the performance of districts, schools, and students, but numerous factors directly affect how students do on assessments. The framers of the Massachusetts Education Reform Act (MERA) of 1993 considered accountability a crucial element of the reform equation and placed it in the original legislation. Following the development and implementation of the new funding formula, the learning standards and curriculum frameworks, and the state MCAS tests to measure performance on those standards, the Massachusetts Legislature created the Office of Educational Quality and Accountability in July 2000 to provide independent and objective audits of school districts across the Commonwealth. The Educational Management Audit Council, comprised of five citizens appointed by the Governor, governs the agency. The EQA is the accountability component of the Education Reform Act and examines school districts on a range of issues to inform educational improvement efforts and promote higher levels of academic achievement of students. The EQA also conducts renewal inspections of charter schools and examinations of underperforming schools and school districts on behalf of the Board of Elementary and Secondary Education (formerly known as the Board of Education). The EQA uses its audits to:

- ❑ provide a comprehensive evaluation of a school district's performance;
- ❑ publish reports on districts selected for review;
- ❑ monitor public education performance statewide to inform policy decisions; and
- ❑ provide public information that helps the state hold districts and schools, including charter schools, accountable.

FIGURE 1: NUMBER OF EXAMINATIONS CONDUCTED BY EQA, FY 2002–FY 2008



Through the educational audit and reporting process, the EMAC and EQA also help the state meet or exceed the expectations and requirements of the Massachusetts Education Reform Act of 1993 and the federal No Child Left Behind Act of 2001. The EQA's model of accountability is nationally recognized, having been cited by the U.S. Department of Education, *Education Week*, and the Fordham Foundation as one of the best accountability systems in the nation.

The EQA is the only entity in the state that examines entire school districts in terms of management, fiscal, and programmatic aspects. The agency reviews district performance in six essential areas, or accountability standards, to determine the quality of school systems. These areas are:

- ❑ leadership, governance, and communication;
- ❑ curriculum and instruction;
- ❑ assessment and program evaluation;
- ❑ human resource management and professional development;
- ❑ access, participation, and student academic support; and
- ❑ financial and asset management effectiveness and efficiency.

Since 2002, the EQA has examined 191 of the 328 school districts in the Commonwealth (some more than once) and has conducted 49 charter school renewal inspections and 33 underperforming school reviews. While there are 328 operating school districts in the Commonwealth, they are administered by 277 individual superintendents; aside from local and regional school districts, there are also Administrative Unions and Supervisory Administrative Districts that are comprised of two or more districts. To date, the EQA has reviewed all of the state's lowest-performing districts, as well as all of the Commonwealth's large city school systems. In consideration of EQA examinations, the Board of Elementary and Secondary Education (BESE) identified six districts as underperforming, and the EMAC placed 22 districts in 'Watch' status. Figure 1 shows the number of examinations conducted by the EQA each year since beginning its work.

The fiscal year 2008 state budget called for the EQA to be phased out and replaced by a "successor entity" and that funds remaining in the EQA budget subsequent to the completion of its work be made available to that entity "for the purpose of promoting school district accountability." As such, the EQA examined fewer districts in FY 2008 than it had in previous years, and after completing those examinations it prepared for shutting down its operations and transitioning its work to its "successor entity." This entity may be organized under a different governance structure, as the Governor's FY 2009 budget recommendation placed the new EQA under a newly established Secretary of Education, but it remains up to the Legislature to determine this.

FY 2008 EQA Activities

In FY 2008, the EQA's staff of nine full-time and one part-time employees and 31 part-time examiners conducted examinations of five school districts, reexamination of seven districts in 'Watch' status, and a review of one underperforming district and renewal inspections of eight charter schools on behalf of the BESE. All seven districts the EQA reexamined were removed from 'Watch' status and many experienced substantial improvement, with much of that spurred by the prior EQA review. The 13 districts reviewed in FY 2008 received a total of \$672,728,745 in state aid, which amounted to 18.1 percent of total state aid, and enrolled 90,877 students, representing 9.4 percent of the state's total public school enrollment. A complete listing of the districts and charter schools reviewed in FY 2008 is presented beginning on page 13 of this report.

Changes in the EQA process and new activities instituted in FY 2008 include:

- ❑ making recommendations to districts to address identified areas of concern;
- ❑ adding five indicators concerning student and family support services, including collaboration with community organizations;
- ❑ expanding the classroom observation protocol and renaming it an instructional inventory, and providing two days of training to examiners in conducting instructional inventories;
- ❑ developing instructional inventory interview questions for superintendents, principals, and teachers to help assess the level of alignment of plans, processes, and practices within the district;
- ❑ adding a section on fidelity of implementation (see sidebar) to the EQA reports;
- ❑ issuing grants to districts to cover the costs of providing documents to the EQA for use in the examination;
- ❑ issuing contracts to examiners based on written evaluations completed by coordinators in the prior year; and
- ❑ preparing to shut down the agency and transition its work to a successor entity.

Fidelity of Implementation: A measure of alignment and consistency of execution of plans and expectations

A characteristic of effective educational organizations is the strong alignment of goals, plans, processes, and actions—from the policymakers to the classroom. Therefore, the EQA has developed a protocol for assessing the alignment of these elements. The *fidelity of implementation* is an indicator of the consistency of execution of a district's expectations: its stated goals, plans, curricula, and various processes, down to the level of instruction. When these various components are consistent and highly aligned, a high level of fidelity of implementation exists. When these are inconsistent and poorly aligned, a low or poor level of fidelity of implementation exists. The instructional inventory protocol is designed to collect evidence of district and school goals, plans, and expectations in the instructional setting.

The EQA Examination Process

The EQA's examinations are aimed at gleaming more information about how district policies, practices, and procedures affect student performance.

District selection

Each year, although statute requires a minimum of 24 districts, the EMAC and EQA select 40 to 50 districts in the state for review; FY 2008 was an exception, as noted earlier, as were the EQA's start-up years of FY 2002 and FY 2003. EMAC policy requires 60 percent of the districts selected to be 'low performing,' or below the state average performance level on the MCAS tests. Other districts that fail to meet adequate yearly progress (AYP) and No Child Left Behind (NCLB) criteria and identified by the state Department of Elementary and Secondary Education (formerly known as the Department of Education) also are administered reviews, and the remainder of the districts are chosen randomly. A small number of districts have requested examination by the EQA.

Data examination

In the first stage of the examination, the EQA staff assesses each district's results on the MCAS tests to find out how students are performing. The data review seeks to answer five basic questions:

1. Are the district's students reaching proficiency levels on the MCAS tests?
2. Do MCAS test results vary among subgroups of students (such as minority and low-income students and students with disabilities)?
3. Has the district's MCAS test performance improved over time?
4. Has the MCAS test performance of the district's student subgroups improved over time?
5. Are all eligible students participating in required state assessments?

Standards-based review

In the second stage of the examination, an in-depth, standards-based review is conducted. This review seeks to provide a more complete picture of why the district is performing at that level, examining district management, planning, and actions and how they are applied at individual schools to assure fidelity of implementation. This stage of the examination focuses on a district's use of data to guide its improvement efforts.

The review analyzes district performance in six major areas or standards: leadership, governance, and communication; curriculum and instruction; assessment and program evaluation; human resource management and professional development; access, participation, and student academic support; and financial and asset management effectiveness and efficiency. In FY 2008, the EQA examined districts based on 72 indicators to assess whether or not they are meeting the standards, and provided a rating of Excellent, Satisfactory, Needs Improvement, or Unsatisfactory for each standard and indicator.

Site visit

As part of the audit process, the EQA sends a team of five to seven specially trained examiners, most of whom are former senior school and district administrators, into the district for a site visit that typically lasts four days. Examiners undergo a rigorous two-week training provided by private consultants and EQA staff members. The training covers such topics as standards of conduct, observation techniques, the General Accounting Office (GAO) Gold Book standards, the EQA's standards and ratings and associated rubrics, and the agency's report development and writing process. Prior to and during the site visit, the EQA examiners conduct an extensive review of 12 documents provided by the district, including district and school improvement plans, curriculum guides and their grade-level benchmarks, budget documents, financial statements, professional contracts, professional development plans, student handbooks, and external program evaluations, as well as documents and data provided by the Department of Elementary and Secondary Education (ESE). During the site visit, the examiners interview the majority of a district's administrators, members of the school committee, municipal officials, groups of teachers, a representative of the local teachers' association, and parents on school councils. The examiners also conduct observations in randomly selected classrooms at all levels in the three tested subject areas of English language arts (ELA), math, and science and technology/engineering (STE).

Report publication

After the examination is concluded, a report is written. This report is given to the district for a factual review and then presented to the EMAC for its consideration and action (see sidebar). When accepted by the EMAC, the report is posted on the EQA website at www.eqa.mass.edu. Copies also are sent to the school district, the district's legislative delegation, the Office of the Attorney General, the Office of the State Auditor, and the Commissioner of Elementary and Secondary Education.

Post-examination Activities

After an examination is completed, the EQA director or deputy director visits the district to provide a debriefing and recommendations on how best to address identified areas of concern as well as to answer questions as needed. In addition, in many instances the EQA director or deputy director meets with the school committee to discuss the examination findings.

EMAC Action

Based on the results of the EQA examination, the EMAC may take one of several actions. It can accept the report and issue a management letter, with commendation and/or concern. If the EMAC has strong concerns, it may place the district in 'Watch' status or recommend a 'declaration of underperformance' to the state Board of Elementary and Secondary Education. In April 2007, the EMAC eliminated any further designations of 'Watch' status after consultations with the Commissioner and Department of Elementary and Secondary Education, although districts in 'Watch' status at that time continued to be subject to reexamination. In FY 2008, given the impending changes for the EQA, the EMAC's only option for action on districts in 'Watch' status was to remove them from this status.

Districts were placed in 'Watch' status if their examination revealed several critical areas of poor or unsatisfactory performance or their plans for improvement lacked an action component. Examples may include districts that had plans to address weaknesses but had not yet fully implemented those plans or that lacked correlation between district actions and student achievement. In addition, some districts were placed in 'Watch' status after they were referred to the BESE for a 'declaration of underperformance' but the board declined to make that determination. Placing districts in 'Watch' status was a transitional response pending the development of a stronger targeted assistance and intervention component within the ESE.

Factors and Practices That Improve Student Achievement

The analysis of the school districts examined by the Office of Educational Quality and Accountability and the MCAS data for all the schools, charter schools, and districts in the state have revealed several general findings that warrant attention. These were included in the *2007 Annual Report* and are presented here because they remain relevant.

Over the past seven years, the EQA has conducted over 200 examinations involving 191 individual districts. Furthermore, the agency has reviewed the achievement, demographic, and financial data for all 328 operating school districts in the Commonwealth. Analysis of the data for all school districts and the site-based evidence gathered from the districts examined by the EQA between FY 2004 and FY 2007 reveals general trends, which range from changes in the general demographic composition of student populations in public schools, to the adequacy of financial support, to basic organizational and operational assumptions about schools themselves.

The state is segregating economically and racially. Demographic data clearly indicate that the state is segregating racially and economically, not just in urban areas, and the gulf between the haves and the have-nots exacerbates the severity of this issue. It is not surprising, then, that performance and achievement gaps persist among socio-economic and racial groups in English language arts, in math, and, most recently, in science and technology/engineering. More needs to be done, especially in addressing issues of equity and achievement, such as better outreach and support programs and better engagement of parents of poor and minority children.

Financial constraints limit school systems' ability to respond to the demands of education reform. Over the past nine years there has been a growing dependency on Chapter 70 funding. It and net school spending have failed to keep pace with the costs associated with supporting local educational systems, and as a result there has been a reduction in the resources to support curriculum and instruction. Although, with few exceptions including urban centers, net school spending requirements have increased, these have had an impact on the local contribution, and there has been an overall disinvestment in basic educational services throughout the Commonwealth. Local systems that have managed to pass overrides have also been able to stabilize and maintain services. In general, however, the vast majority of new funds and additional existing operating funds have been diverted to meet extraordinary increases in health insurance, energy, and other fixed structural costs in addition to structural salary increases associated with multi-celled pay scales. Special education costs have increased to such an extent that they have impinged upon districts' ability to maintain services. Increased competition at the municipal level has also resulted in less support for additional costs and funds for public education. Voting patterns in most communities examined showed that schools and their supporters are not getting out the vote for overrides in these communities. As a result, services and programs, including professional development programs, have been eliminated in efforts to balance budgets, and the breadth and quality of many local educational programs are suffering.

Stability and persistence pay off. The lift in the MCAS results in 2007 and the placement of Massachusetts at the top of the National Assessment of Educational Progress (NAEP) achievement for the second year in a row show that staying the course has had benefits for the state and its students. In part, the establishment of common goals in education reform and the resulting common curricula driven by the state standards have enabled this achievement. Furthermore, within the administrative levels of most districts is the emergence of a culture of data-driven decision-making. However, while data are enjoying wider use, they are not always well understood or available at the instructional levels.

Small school districts lack the adequate size, capacity, and staffing to address the demands of education reform.

The Massachusetts public education system teaches close to one million students in 1,900 schools, organized into 328 different operating school districts, each under the control of a local school committee. Many of these districts are small, and because of their small size they often lack sufficient staffing, budgets, expertise, and capacity to provide all of the administrative and instructional support services and skills expected under the standards of the Massachusetts Education Reform Act and to provide support for all levels of the organization. In these districts, individual administrators frequently assume many different responsibilities and may be unable to do all of their jobs effectively. Furthermore, the levels of administrative costs for district operations, curriculum coordination, instructional and student support, and financial management are too high, when calculated on a per pupil basis. The Commonwealth must address the issue of viable size and appropriate scale to determine the best way to organize its schools systems for maximum efficiency and effectiveness.

Disconnected processes undermine improvement in performance. In the districts the EQA has examined, it has found that processes and practices in school systems are sometimes fragmented and lack systemic connections and impact. This has inhibited those systems from enjoying greater benefits from their reform efforts and plans. The EQA has found some districts struggling with implementing critical instructional and operational processes that support student achievement. The state has succeeded in creating a stronger framework to support student achievement and districts are getting better. For some districts, however, implementation of systemic planning remains a challenge. The task is to address the obstructed or missing connections and complete these processes and procedures in order to improve their efficiency and increase their overall effectiveness.

The next frontier of education reform is instruction. The conditions for teaching need to improve. The EQA's classroom observations indicate that more attention needs to be paid to fragmented use of time, limited access to learners, as well as limited access to resources. Where they occur, cluttered schedules, overly busy curricula, and ongoing, daily distractions make it difficult to present deep, detailed instructional programs that would promote higher-order thinking skills. Teachers are not always involved in or encouraged to be agents for educational change. The act of teaching can be overly scheduled, very busy, and fragmented. Most systems are not structured so that teachers have time to consult, observe, or reflect. Program adoption is not always strategic or well supported by appropriately funded professional development. Greater attention and investment needs to be made in high quality professional development and professional support programs such as coaching and mentoring and other programs that improve skills understanding and build capacity for teachers. Persistence has paid off and Massachusetts has much to be proud of, as evidenced by the NAEP scores. The next phase of education reform requires a major focus on supporting instructional improvement and the conditions for teaching and learning.

A Look at District Performance

Research shows that high-performing and rapidly improving districts have solid management. To better understand the factors affecting student achievement as measured by the MCAS tests, the EQA analyzed district performance on 72 indicators in six areas or standards: leadership, governance, and communication (I); curriculum and instruction (II); assessment and program evaluation (III); human resource management and professional development (IV); access, participation, and student academic support (V); and financial and asset management effectiveness and efficiency (VI). Taken together, these factors are a measure of the effectiveness—or quality—of a district's management system.

The EQA rated the districts it examined in FY 2008 on each of the 72 indicators comprising the six EQA standards. The potential ratings were 'Excellent,' 'Satisfactory,' 'Needs Improvement,' and 'Unsatisfactory.' Each rating was assigned points as follows: 'Excellent' and 'Satisfactory' = 4 points; 'Needs Improvement' = 2 points; and 'Unsatisfactory' = 0 points. A score for each standard was computed by dividing the sum of the points received for the applicable indicators in that standard by the total possible points for the standard. The standard scores were assigned a management quality level as follows: 81 to 100 percent = 'Strong'; 61 to 80 percent = 'Improvable'; 41 to 60 percent = 'Poor'; 21 to 40 percent = 'Very Poor'; 11 to 20 percent = 'Critically Poor'; and 0 to 10 percent = 'Unacceptable.' A standard score of 100 percent means that the district performed at a satisfactory level on all indicators in the standard, although it does not necessarily mean that the district was perfect. The Management Quality Index (MQI) is an average of the standard scores and is an overall measure of the quality of a district's management.

Figure 2 shows the standard scores and the MQI score for the five districts examined by the EQA in FY 2008, and their Proficiency Index and Comparable Value scores for English language arts and math on the 2007 MCAS tests. Figure 3 shows the Proficiency Index and Comparable Value scores for the seven districts reexamined by the EQA in FY 2008, and the one underperforming district reviewed on behalf of the BESE; because districts in 'Watch' status are not reexamined on all indicators, MQI scores are not computed for them, or for underperforming school districts.

The Proficiency Index is a measure of student performance on the MCAS tests that shows whether students have attained or are making progress toward proficiency, or meeting the state standard. The unit of measure is Proficiency Index (PI) points, and a score of 100 indicates that all students are proficient.

Comparable Value Analysis (CVA) is a statistical technique developed for the EQA that compares the performance of a district's (or school's) individual students on the MCAS tests to their statewide demographic peers' performance on a student by student basis. The result is a positive value if the particular in-district student performed at a higher rate than the statewide demographic peer group, or a negative value if the student achieved at a lower level. These data are then aggregated for the district's students. Each CVA point represents one scaled score point on the MCAS tests. For example, a positive 3.25 would mean that, on average, the district's students achieved 3.25 scaled score points higher than their peer comparison group. Standard scores that are greater than one standard deviation (equal to 2.96) above or below the state average, which is normed against 2006 data, are highlighted in green and red, respectively.

FIGURE 2: PERFORMANCE OF DISTRICTS EXAMINED BY EQA IN FY 2008

| District | Standard Score | | | | | | | Proficiency Index | | Comparable Value | |
|------------------|----------------|------|-------|------|------|------|------|-------------------|------|------------------|------|
| | I | II | III | IV | V | VI | MQI | ELA | Math | ELA | Math |
| Agawam | 96.4 | 77.3 | 81.3 | 88.5 | 84.6 | 92.3 | 87.5 | 89.3 | 82.0 | -0.1 | 3.5 |
| Amherst Regional | 89.3 | 72.7 | 87.5 | 57.7 | 96.2 | 80.8 | 80.6 | 92.0 | 87.2 | 6.4 | 9.6 |
| Groton-Dunstable | 92.9 | 86.4 | 100.0 | 84.6 | 96.2 | 95.8 | 92.3 | 95.3 | 91.6 | 1.3 | 5.5 |
| Methuen | 96.4 | 81.8 | 81.3 | 96.2 | 88.5 | 88.5 | 89.6 | 84.1 | 73.8 | -0.3 | 1.3 |
| Saugus | 25.0 | 31.8 | 37.5 | 26.9 | 65.4 | 34.6 | 36.8 | 86.4 | 72.6 | -2.2 | -1.9 |
| State average | | | | | | | | 85.7 | 76.1 | 0.5 | 2.0 |

Data above are based on 2007 MCAS tests.

FIGURE 3: PERFORMANCE OF DISTRICTS IN 'WATCH' STATUS REEXAMINED BY EQA IN FY 2008

| District | Proficiency Index | | Comparable Value | |
|-------------------------------|-------------------|------|------------------|------|
| | ELA | Math | ELA | Math |
| Athol-Royalston | 79.4 | 69.1 | -1.5 | 1.3 |
| Greater Lawrence RVT | 69.9 | 68.8 | 0.0 | 2.7 |
| Lawrence | 67.0 | 50.9 | -2.4 | -2.4 |
| Lowell | 72.6 | 60.4 | -0.3 | 0.6 |
| Lynn | 77.0 | 66.6 | 1.8 | 4.2 |
| Pathfinder RVT | 78.3 | 71.8 | -2.5 | -4.6 |
| Southbridge (underperforming) | 73.1 | 58.1 | -2.9 | -1.6 |
| Worcester | 74.3 | 62.6 | -1.2 | 0.4 |
| State average | 85.7 | 76.1 | 0.5 | 2.0 |

Data above are based on 2007 MCAS tests.

School districts can learn from one another by sharing best practices. Figure 4 shows the districts examined by the EQA in FY 2008 that received indicator ratings of 'Excellent'. An indicator rating of 'Excellent' means that the practice examined has been in place in the district consistently during the examination period, has resulted in improved student achievement, is broadly disseminated throughout the district, and is replicable and not dependent on particular individuals.

FIGURE 4: DISTRICTS WITH INDICATOR RATINGS OF 'EXCELLENT' IN FY 2008

| District | Standard | Indicator |
|----------------------|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agawam | Leadership, Governance, and Communication | The superintendent created and disseminated a comprehensive safety plan in collaboration with the community and plans were reviewed annually with the police and fire departments prior to each school year. School and district safety plans were aligned. |
| | Curriculum and Instruction | The district created inclusive classrooms or programs for student populations, through an integrated services model, minimizing separation from the mainstream. |
| | Financial and Asset Management Effectiveness and Efficiency | The schools were secure and had systems to ensure student safety. |
| Greater Lawrence RVT | Financial and Asset Management Effectiveness and Efficiency | The schools were secure and had systems to ensure student safety. |
| Groton-Dunstable | Access, Participation, and Student Academic Support | The district had fair and equitable policies, procedures, and practices to reduce discipline referrals, grade retention, suspension, and exclusion. |
| | Access, Participation, and Student Academic Support | The district had policies, procedures, and practices to prevent or minimize dropping out, and to recover dropouts and return them to an educationally appropriate placement. |
| Lowell | Human Resource Management and Professional Development | The district's plan met or exceeded state requirements for resources committed to professional development, and the plan was evaluated for its effectiveness in advancing student performance. (2005 indicator 8.2 reexamined) |
| Lynn | Leadership, Governance, and Communication | The district formed partnerships with community human service agencies and benefactors, such as corporate and civic sponsors, to provide at-risk students and families access to health, social, recreational and supplemental educational services. |
| Methuen | Leadership, Governance, and Communication | The district and school leaders had a clearly understood vision and/or mission, goals, and priorities included in the District Improvement Plan (DIP). The standards-based plan and the analysis of student achievement data drove the development, implementation, and modification of educational programs. |
| | Leadership, Governance, and Communication | Each school used an approved School Improvement Plan (SIP) that was aligned with the DIP and was based on the analysis of student achievement data. |
| | Assessment and Program Evaluation | District assessment policies and practices were characterized by the continuous collection, analysis, and use of student assessment results by district and school leadership. |

(continued on next page)

FIGURE 4: DISTRICTS WITH INDICATOR RATINGS OF 'EXCELLENT' IN FY 2008 (continued)

| District | Standard | Indicator |
|-----------|-------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Worcester | Leadership, Governance, and Communication | The district formed partnerships with community human service agencies and benefactors, such as corporate and civic sponsors, to provide at-risk students and families access to health, social, recreational and supplemental educational services. |
| | Leadership, Governance, and Communication | The superintendent created and disseminated a comprehensive safety plan in collaboration with the community and plans were reviewed annually with the police and fire departments prior to each school year. School and district safety plans were aligned. |
| | Human Resource Management and Professional Development | The district provided ongoing and regular training in dealing with crises and emergencies to all staff, provided procedures for substitutes, student-teachers, and volunteers responsible for students, and provided opportunities to practice emergency procedures with all students. |
| | Financial and Asset Management Effectiveness and Efficiency | The district had a system in place to pursue, acquire, monitor, and coordinate all local, state, federal, and private competitive grants and monitored special revenue funds, revolving accounts, and the fees related to them to ensure that they were managed efficiently and used effectively for the purposes intended. |

District Reviews and Actions

The EQA conducted examinations of five districts and reexaminations of seven districts in Massachusetts in FY 2008 using data provided by the Massachusetts Department of Elementary and Secondary Education; data analysis by Merrimack Educational Collaborative (MEC); documents provided by the districts; site visits in the districts; and training by ClassMeasures and Claris Group educational consultants. Figures 5 and 6 show the actions taken by the EMAC regarding the districts examined and reexamined, respectively, by the EQA in FY 2008.

FIGURE 5: ACTION ON DISTRICTS EXAMINED BY EQA IN FY 2008

| District | Date of EMAC Action | EMAC Action |
|------------------|---------------------|----------------------------------------------------------------------|
| Agawam | April 2008 | Report accepted, with management letter of commendation and concern. |
| Amherst Regional | March 2008 | Report accepted, with management letter of commendation. |
| Groton-Dunstable | March 2008 | Report accepted, with management letter of commendation and concern. |
| Methuen | April 2008 | Report accepted, with management letter of commendation and concern. |
| Saugus | March 2008 | Report accepted, with management letter of concern. |

FIGURE 6: ACTION ON DISTRICTS IN 'WATCH' STATUS REEXAMINED BY EQA IN FY 2008

| District | Date of EMAC Action | EMAC Action |
|----------------------|---------------------|------------------------------------------------------------------------------------------------------|
| Athol-Royalston | October 2007 | Removed from Watch, report accepted with management letter of concern, monitoring services retained. |
| Greater Lawrence RVT | April 2008 | Removed from Watch, report accepted with management letter of commendation. |
| Lawrence | April 2008 | Removed from Watch, report accepted with management letter of commendation and concern. |
| Lowell | April 2008 | Removed from Watch, report accepted with management letter of commendation and concern. |
| Lynn | March 2008 | Removed from Watch, report accepted with management letter of commendation and concern. |
| Pathfinder RVT | March 2008 | Removed from Watch, report accepted with management letter of concern. |
| Worcester | April 2008 | Removed from Watch, report accepted with management letter of commendation. |

Underperforming School Districts Examined by EQA in FY 2008

Southbridge

Charter School Renewal Inspections Conducted by EQA in FY 2008

| | |
|-------------|------------------------------------------------|
| Boston | Boston Collegiate Charter School |
| | Boston Day and Evening Academy Charter School |
| | Excel Academy Charter School |
| | Health Careers Academy |
| | Smith Leadership Academy Charter Public School |
| Greenfield | Four Rivers Charter Public School |
| Plymouth | Rising Tide Charter Public School |
| Springfield | New Leadership Public Charter School |

Budget

In FY 2008, the EMAC and EQA budget was \$2,974,554. The operating budget was \$2,932,124; of this amount, more than \$357,435 was spent on renewal inspections of eight charter schools. The 13 district examinations conducted in FY 2008 cost an average of \$37,500 each.

| INTERAGENCY SERVICE AGREEMENT ALLOCATION | |
|------------------------------------------|--------------------|
| ISA with the Central Business Office | \$29,430 |
| Documentation Grants to Districts | \$13,000 |
| Operating Budget of the Office | \$2,932,124 |
| TOTAL | \$2,974,554 |

The FY 2008 budget language for the EQA is as follows:

For the office of educational quality and accountability established pursuant to section 55A of chapter 15 of the General Laws for the purpose of completing ongoing audits and those scheduled with school districts as of May 1, 2007 and for the operation of any successor entity to the office established pursuant to amendment of said section 55A of chapter 15 of the General Laws; provided further, that expenditures made pursuant to this line item shall be subject to section 9B of chapter 29 of the General Laws; and provided further, that funds remaining in this item subsequent to the completion of ongoing and scheduled audits shall be made available to any successor entity to the office of educational quality and accountability for the purpose of promoting school district accountability.....\$2,974,554

EDUCATIONAL MANAGEMENT AUDIT COUNCIL MEMBERS, FY 2008

Irwin Blumer, August 2007 –

Joseph Esposito, December 2006 –

Ethan d'Ablemont Burnes, August 2007 –

Alison L. Fraser, January 2007 –

Maryellen Donahue, Chair, August 2007 –

OFFICE OF EDUCATIONAL QUALITY AND ACCOUNTABILITY STAFF

Full Time

Dr. Joseph B. Rappa, Executive Director (staff to the council)

Dr. John J. Aherne, Interim Executive Director, April-June 2008

Dr. Albert Argenziano, Deputy Director of District Services (part-time)

Paula Hutton, Examiner/Field Program Coordinator

David Lockwood, Examiner/Field Program Coordinator

Eva Mitchell, Examiner/Field Program Coordinator

Dr. John Roper, Examiner/Field Program Coordinator

Steven Chrostowski, Senior Editor/Policy Analyst

Michael George, Research Analyst

Amanda Amory, Technical Writer/Financial Clerk

Althea Hudson, Administrative Assistant

Part-Time Senior and Associate Examiners

Helen Apostolides, Field Examiner

Marion Bank, Field Examiner

Lisa Bryant, Field Examiner

William Contreras, Field Examiner

Lincoln DeMoura, Field Examiner

Rose DiOrio, Field Examiner

Stratos Dukakis, Senior Field Examiner

Dolores Fitzgerald, Field Program Coordinator

George Gearhart, Senior Field Examiner

Joanne Grenier, Field Examiner

Linda Greyser, Field Examiner

James Hearn, Field Program Coordinator

Thomas Johnson, Field Examiner

John Kulevich, Senior Field Examiner/Monitor

Katherine Lopez-Natale, Field Examiner

James McAuliffe, Field Examiner

Patricia McCusker, Field Examiner

Michael Molongoski, Field Examiner

Josephine Napolitano, Field Examiner

Joseph Nigro, Field Examiner

Patricia O'Leary, Field Examiner

Andrew Paquette, Field Business Specialist

Louis Perullo, Senior Field Monitor

Thomas Petray, Field Examiner

Frank Sambuceti, Field Examiner

Wilfred Savoie, Senior Field Examiner/Monitor

Rena Shea, Senior Field Examiner

John Sheehan, Field Examiner

Charles Valera, Senior Field Examiner

William Wassel, Field Examiner

Patricia Williams, Field Examiner

William Wolf, Field Examiner/Monitor

COMMONWEALTH OF MASSACHUSETTS

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