# Report to the Legislature: Student Opportunity Act Three-Year Evidence-Based Plans (2022-2023 and 2023-2024)

This report describes the Department's ongoing oversight and support for the Student Opportunity Act (SOA) Plan development and implementation process between July 1, 2022, and June 30, 2023, and between July 1, 2023, and June 30, 2024, pursuant to Chapter 132 of the Acts of 2019, The Student Opportunity Act, Section 1S.

June 2025

Dear Members of the General Court:

I am pleased to submit this report which consolidates annual progress reports for FY23-FY24. Each report describes the ongoing work of the Department of Elementary and Secondary Education (Department) in supporting districts as they develop and implement 3-year plans, as detailed in Section 1S(c) of the Student Opportunity Act (Chapter 132 of the Acts of 2019).

Districts' 3-year plans, commonly referred to as SOA Plans, are intended to address—and ultimately close—longstanding gaps in learning experiences, academic outcomes, and lifetime outcomes for students from historically underserved groups. These include English learners, students with disabilities, students from high-poverty backgrounds, as well as other student groups.

The FY23 report focuses primarily on data collection and findings from districts' FY23 SOA Progress Reports, which reported on the second year of implementation of the first round of 3-year SOA Plans. The FY24 report opens with some initial reflections on what we learned from the first round of plans, which were implemented between FY22 and FY24. For the first time since the pandemic, we are able to provide some early data on the progress districts are making in meeting targets for student groups and closing gaps in achievement. It then turns to statewide planning and data collection for districts' second set of 3-year plans, which were due April 1, 2024, and includes links to the FY24 SOA Summary report, which describes in the aggregate what is contained in the second round of SOA Plans.

The Department remains highly committed to the important work of substantially reducing long-standing disparities in learning experiences and outcomes experienced by many of our students. If you have any questions about the FY23 and FY24 progress updates, please reach out to Jessica Leitz, Director of External Partnerships.

Regards,

Patrick Tutwiler, Interim Commissioner
Massachusetts Department of Elementary and Secondary Education

# Report to the Legislature: Student Opportunity Act Three-Year Evidence-Based Plans (2022-2023)

# Contents

# Introduction

The Department of Elementary and Secondary Education respectfully submits this Report to the Legislature: Student Opportunity Act Three-Year Evidence-Based Plans (2022-2023) pursuant to Chapter 132 of the Acts of 2019, The Student Opportunity Act:

> *Annually, not later than December 31, the commissioner shall submit a report to the clerks of the house of representatives and the senate and the chairs of the joint committee on education on the progress made in addressing persistent disparities in achievement among student subgroups in the aggregate and within subcategories on a statewide basis; provided, however, that district and school-level data shall be made available on the department's website along with the report. (M.G.L. Ch. 69 § 1S (d))*

The Student Opportunity Act (SOA) was enacted in 2019, infusing significant new funding into the Commonwealth's educational system, with the majority directed towards chronically underfunded districts. The SOA legislation adopted the *Foundation Budget Review Commission*'s October 2015 recommendations, which addressed the state's overall underinvestment in education and revised the Chapter 70 formula used to allocate funds to districts by:

- Raising per pupil funding for English learners; more for those in high schools;
- Increasing special education enrollment and cost assumptions to more accurately reflect district enrollment;
- Increasing funding for districts with high concentrations of poverty; and
- Increasing funding for healthcare costs of active employees and retirees by basing costs on up-to-date health insurance trend data collected by the state's Group Insurance Commission (GIC)

By 2027, the state expects to increase Chapter 70 funding by more than $1.5 billion over FY21 funding levels.  The Department designated 25 districts that received $1.5 million or more in additional Chapter 70 aid in FY22 as 'high-funding' districts (see Appendix A for the list of high-funding districts).  In FY23, 55 percent of the $494.9 million increase in Chapter

70 aid was distributed to these districts, with the remaining 45 percent distributed to the 294 remaining districts.  In the academic year 2022-23, these 25 districts enrolled 32 percent of the Commonwealth's students, served 59 percent of its English learners, almost half (47 percent) of its low-income students, and just under one-third of students with disabilities—groups that are explicitly addressed by the revised Chapter 70 funding formula.

**Three-year evidence-based plans to reduce disparities.** Another key provision of the SOA legislation requires every school district and charter school in the state to develop three-year plans, referred to as SOA plans.  These plans are the focus of this report to the legislature.

The SOA legislation calls for districts' 3-year gap-closing plans to include the following key components:

- Based on an analysis of disaggregated analysis of state and local data, identify which student groups are experiencing gaps in student learning experiences and outcomes.
- The key evidence-based program areas the district is focusing on to narrow gaps for identified student groups.
- Multi-funding stream investments districts are making in each identified evidence-based program area.
- Metrics districts expect to use to measure progress.
- Family/caregiver engagement structures.
- Stakeholder involvement in the plan development and implementation process.

Every district, including charter school districts, is expected to develop a plan, regardless of the amount of additional SOA funding it receives. Districts' current SOA Plans cover implementation years FY22-FY24. New 3-year plans covering implementation years FY25-FY27 are due in April 2024.

**Impact of the pandemic on SOA plan development and implementation.** Due to the substantial impact of the pandemic on districts and schools, the legislature granted DESE the authority to delay the submission of districts' first round of SOA Plans from April 2020 to January 2021.  The initial infusion and distribution of additional Chapter 70 funding was also delayed from FY21 to FY22. While the pandemic delayed the implementation of the Student Opportunity Act, substantial funding from federal Elementary and Secondary School Emergency Relief (ESSER) began flowing to districts in July 2020 and by the fall of 2022, districts in Massachusetts had received almost $2.6 billion in ESSER funding alone.

Because of the substantial financial impact of ESSER funding, districts were provided with the opportunity to revisit their original SOA Plans. Districts were asked to focus their

amendments on needs that emerged during the pandemic, as well as address how they were using SOA funds and [federal Elementary and Secondary School Emergency Relief funds (ESSER)](#), as well as other funding sources, to close opportunity and outcome gaps for underserved student groups. Each district's amended plan is publicly posted on the [Department](#)'s website in accordance with the SOA legislation. Plan amendment submissions in April 2022 confirmed that districts were focusing on supporting underserved student groups and implementing evidence-based programs outlined in the SOA legislation, many of which are specifically targeted to pandemic recovery efforts. The Department's oversight of that process, the subsequent review and feedback to districts, and lessons learned from plans are detailed in DESE's *Report to the Legislature: Student Opportunity Act Three-Year Evidence-Based Plans (2021-2022)*.

**The remainder of this report**. The remainder of this report describes the Department's ongoing oversight and support for the SOA Plan development and implementation process between July 1, 2022-June 30, 2023 (FY23). It includes:

- Key activities in FY23
- Data collected in FY23 SOA Progress Reports
- Key findings from SOA progress reports
- Looking Ahead to FY24

## Key Activities in FY23

Key activities supporting SOA plan development and implementation of SOA Plans between July 1, 2022 and June 30, 2023 included:

- **Publicly Posting FY22 SOA Plan amendments.** The SOA legislation requires DESE to publicly post individual district plans. Amendments were posted in August 2022 on DESE's Website on a newly developed [SOA Dashboard](#). Development of the dashboard in PowerBI began in FY21 and was finalized in FY22. The user-friendly dashboard integrates information from districts' original plans and FY22 amendments. Looking up individual plans is simple and straightforward; data are displayed in attractive, easy-to-understand formats.

- **Planning for SOA Progress Reports, due April 1, 2023.** The SOA legislation requires districts to provide annual updates to report progress in closing gaps for identified student groups. During the first half of FY22, the SOA team developed a data collection template, set up a process for collecting updates, created guidance for districts, and identified a set of supports for districts to be delivered throughout the data collection process. Guidance was released to districts and an informational overview on the SOA Update template and process was delivered in January 2023. The guidance and a recording of the webinar, as well as information about other supports available, were all posted on DESE's [SOA District Resources](#) web page in January 2023.

- **Data collection.**  Primary data collection took place between January 2023 and April 1, 2023. Written resources posted on the SOA District Resources page were complemented by opportunities for districts to request ½ hour consultations with the Department SOA team as they prepared their updates. The SOA team conducted consultations with 47 districts during the plan development and data collection period. The SOA team also maintains a dedicated mailbox (SOAPlans@mass.gov) to which districts can submit questions. SOA Progress Reports for SOA Plan implementation for 2022-2023 were due to the Department by April 1, 2023.

- **Review of SOA Progress Reports.**  SOA Progress Reports were reviewed by Department staff between April and June 2023. Reviewers reached out to 15 percent of districts, where data were incomplete and in instances where the progress report was largely unresponsive to the prompts provided in the SOA Progress Report template.

    Reviewers also reviewed plans against a set of criteria to assess the quality of plans. The aggregated data were analyzed to help inform the Department's understanding of where districts may need additional supports and guidance as they develop new SOA Plans, which were due in April 2024.  Key findings from that analysis are presented below.

- **Ongoing Support from the Department.**  Ongoing supports from the Department includes grant programs, professional development networks, and other resources. In Spring 2022, the Department rolled out its Educational Vision, accompanied by a Catalog of Aligned Supports.

    Most districts receiving $1.5 million or more in additional Chapter 70 funding in SY2021-22 also have one or more schools designated as in need of assistance in the accountability system. As such, these districts are prioritized to receive direct supports from the Department including additional funding and targeted support in allocating resources, planning, implementation, and progress monitoring from the Department's Statewide System of Support team.

## Data Collected in FY23 SOA Progress Reports

Districts provided the following in their FY23 SOA Progress Reports:

1. A summary of progress to date;
2. Updated implementation detail for each evidence-based practice in their plans;
3. Budget information on anticipated FY23 expenditures for each EBP; and
4. Updates on efforts to engage parents and other stakeholders

1. **Summary of progress.**  Districts were asked to write a brief narrative providing a high-level summary of progress to date. In their summaries, districts were asked to use progress monitoring data to describe evidence of gap-closing for the student groups targeted in their plans and draw connections between those outcomes and the implementation of the evidence-based strategies in their plans. Districts were also asked to describe any implementation successes and challenges they encountered.

2. **Updated implementation details for each EBP.**  Districts provided updated information on implementation in two ways:

   a. By responding to a set of closed-ended implementation indicators designed to capture the stage of implementation districts have reached for the key strategies associated with the EBPs in their plans. Districts indicate which components are part of their approach and characterize the current stage of implementation for each component. In the aggregate, these data provide a snapshot of what districts are implementing, and the stage of implementation. Indicators for each EBP are available in the [FY22 SOA Implementation Indicators Resource](#).

   b. Districts also shared one or two sentences describing the immediate next steps for implementation for each EBP in their plans.

3. **Budget information on anticipated expenditures**. Districts' updates included budget data describing anticipated expenditures for each EBP through the end of FY23 (*i.e., June 30, 2023)*. Data were expected to reflect total spending across multiple funding sources (i.e., all Chapter 70 funds, ESSER, and other state and federal grant funds).

   DESE also piloted a new budget item that was designed to collect additional information for districts in which the amount of total FY23 Chapter 70 funding being used to support the implementation of the EBPs in their plans was less than the amount of *additional FY23* Chapter 70 funding districts were receiving. District responses to this prompt varied widely, providing the Department with an inadequate data source from which to draw conclusions. The Department does not expect to incorporate the item into subsequent plan data collections.

4. **Updates on efforts to engage parents and other stakeholders.**  Districts provided brief updates on progress in improving and/or increasing family/caregiver engagement. They were asked to focus in particular on families/caregivers of student groups targeted for gap-closing and to incorporate data on measuring family engagement that districts are required to include in their SOA Plans.

   Districts were also asked to share information about ongoing stakeholder engagement as SOA Plans are being implemented, including:  a) the ways in which it shares updates on plan implementation and evidence of impacts; b) ongoing efforts to collect input

and feedback from different stakeholder groups; and c) the substantive input and feedback the district has received from different stakeholder groups, particularly what they are hearing from stakeholders representing student groups targeted for gap-closing.

# Key Findings from SOA Progress Reports

The goal of the review process for progress reports was to learn more about the quality of plans, with particular attention to the extent to which districts' narrative summaries:

- Focused on outcomes in addition to implementation progress;
- Reported on disaggregated outcomes for student groups targeted in their plans—as opposed to limiting the discussion to overall improvement for all students; and
- Explicitly addressed gap-closing for targeted student groups.

**Summary of Progress.**  The majority of SOA Progress Report summaries offered useful, clearly written descriptive updates centered around the key evidence-based programs in their SOA Plans and self-reported progress toward meeting targets. Virtually all narrative summaries of progress provided an update on progress in implementing the EBPs in their plans. Districts were asked to share implementation successes as well as challenges. Not surprisingly, many of the challenges noted were pandemic-related *(e.g., difficulty hiring qualified staff for new/vacant positions)*.

Districts were also asked to report on evidence of gap-closing for targeted student groups that they attributed to the implementation of the EBPs in their SOA Plans. Districts were encouraged to use progress monitoring data and to include information about leading indicators of change *(e.g., improvements in the % of classrooms demonstrating skilled implementation of new high-quality instructional materials)* that would need to happen before seeing improvements in lagging indicators of change *(e.g., increases in the percent of students meeting or exceeding expectations on MCAS)*.

- Most summaries (79 percent) cited specific evidence of implementation progress and/or student outcomes.
- Almost two-thirds (63 percent) of progress summaries addressed outcomes for students; just over one-third (37 percent) focused exclusively on implementation progress.
- Of those summaries that do address student outcomes:
  - Most (73 percent) explicitly addressed improved outcomes (or lack thereof) for targeted student groups; most of these also referenced gap-closing for student groups.
  - Just over a quarter of summaries (27 percent) limited their discussion to improvement for *all* students, without reference to targeted student groups.
- Almost one-third (31 percent) included generic statements about change without substantiating them with evidence *(e.g., we saw substantial improvement in MCAS scores),* or offered anecdotal evidence of changes *(e.g., teachers say they are making changes in classroom practice)*.

**Budget information on anticipated FY23 expenditures.** Districts submitted budget projections showing the financial expenditures allocated to each of the evidence-based practices they selected. It is important to note that since the state does not currently provide multi-year Chapter 70 budget projections to districts, they were not asked to provide multi-year budget projections in their plans. Districts submitted braided expenditures for existing and increased Chapter 70, ESSER, and other local, state, and federal funds for each year in which plans were collected, in recognition of the fact that districts pull from multiple sources to fund their priorities. This approach to reporting allows the Department to see significantly greater scope of investments in the EBPs than if it focused solely on increased Chapter 70 funding.

Almost two-thirds (66%) of all districts and over half (55%) of high-funding districts report that they anticipated spending locally appropriated funds to support the implementation of the EBPs in their plans in an amount **_equal to or larger_** than the amount of additional Chapter 70 aid received in FY23.

Table 1 represents the evidence-based practices most invested in according to district reporting in the SOA Progress Reports submitted in April 2023.

**Table 1: Investments by evidence-based program**

| Evidence-based program area | Total $ | Total % of reported funds |
|---|---|---|
| High Quality Instructional Materials | $74,195,293 | 22% |
| Co-teaching & Inclusion | $68,281,163 | 20% |
| Social Emotional Learning/Mental Health | $49,991,834 | 15% |
| Early Literacy | $28,915,991 | 9% |
| Cycle of Continuous Improvement | $17,844,929 | 5% |
| Pre-Kindergarten/Full Kindergarten | $16,136,492 | 5% |
| Acceleration Academies | $13,203,185 | 4% |

Source: FY23 SOA Progress Report data. Data are self-reported by districts and indicate the amount spent across all funding sources, e.g., *ESSER I, ESSER II, ESSER III, Local funding (including Chapter 70), Other Federal grants (e.g., Title grants), other state grants (e.g., GLEAM grants), Mass Business Authority Funds, Other*

Districts' three-year SOA Plans represent just one of many data sources the Department will draw upon to assess the implementation and impact of the SOA. The Department plans to use data across multiple sources (e.g., end-of-year spending reports, student outcome data, and evidence-based program grant data) to gain a more complete understanding of the fiscal impact of the revised Chapter 70 funding formula, as well as assess the impact of evidence-based investments on closing learning and outcome gaps for our students that are least well-served.

# Looking Ahead

During the upcoming year, districts will be developing new 3-year SOA Plans, which are due April 1, 2024, and will be implemented in FY25-FY27.

The Department is taking several approaches to continue strengthening the quality of the next round of SOA Plans:

1. Aligning SOA Plans to DESE's Educational Vision
2. Utilizing lessons learned from the first round of SOA Plans
3. Moving to a more effective and efficient data collection system

1. **Aligning SOA Plans to DESE's Educational Vision**. DESE is leveraging the cross-departmental workgroup that developed the original Educational Vision to identify a set of evidence-based programs (EBPs) linked to its 3 strategic objectives and 10 focus areas.  The workgroup will revisit the current set of recommended EBPs in Appendix B to ensure that they are linked to the Educational Vision and are consistent in scope. Where appropriate, EBPs not reflected in the existing list will be added. Districts will utilize the revised list of EBPs as they determine which evidence-based strategies are key to reducing the most concerning disparities for student groups in their district in their new SOA Plans.

2. **Utilizing lessons learned from the first round of SOA Plans.**  Based on some of the lessons learned described in this report, and the FY22 legislative report, the Department is taking the following steps to improve plan quality:

   - Improving messaging to dispel lingering misconceptions about SOA Plans.  (e.g., my district does not need to write a plan because we are not receiving much additional Chapter 70 funding).
   - Clarifying and streamlining reporting on projected budget expenditures.
   - Developing additional resources and guidance to build district capacity to a) disaggregate data, b) consider a wider array of data, and c) use data to consider the underlying reasons for gaps in learning experiences and outcomes for different student groups.  A key new data resource under development is a student outcomes data tool that will offer an at-a-glance dashboard highlighting which student groups are experiencing the greatest disparities across multiple data points within a district (i.e., chronic absenteeism, out-of-school suspension, ninth-grade passing rates, pathways enrollment, dropout, and graduation rates, MCAS ELA and Math achievement).

3. **Moving to a more effective and efficient data collection system.** Both districts and Department staff experienced significant technical challenges in working with the Alchemer data collection platform. Districts' new SOA Plans will be collected via the Department's *Grants Education Management System* (GEM$). The Department expects this shift to improve the efficiency with which data are collected, facilitate the review and revision of SOA Plans; and result in better analytic data. The GEM$ system also makes it easy to make SOA Plans publicly available, as required by statute.

## Appendix A: "High Funding Districts" receiving $1.5 million or more in additional Chapter 70 aid in FY22 (N=25)

| District | Increase in FY22 Chapter 70 aid (compared to FY21) |
|---|---|
| Boston | 1,821,120 |
| Brockton | 23,148,786 |
| Chelsea | 9,322,330 |
| Chicopee | 3,417,947 |
| Everett | 9,334,212 |
| Fall River | 8,166,479 |
| Fitchburg | 3,540,254 |
| Haverhill | 1,632,480 |
| Holyoke | 3,900,517 |
| Lawrence | 15,287,211 |
| Lowell | 11,599,005 |
| Lynn | 14,079,365 |
| New Bedford | 7,654,680 |
| Quincy | 3,224,569 |
| Randolph | 1,680,580 |
| Revere | 10,652,533 |
| Springfield | 26,179,139 |
| Taunton | 2,258,563 |
| Westborough | 2,879,155 |
| Worcester | 13,719,650 |
| Greater Fall River RVT | 1,544,809 |
| Greater Lawrence RVT | 2,031,222 |
| Greater New Bedford  RVT | 1,571,894 |
| Greater Lowell RVT | 2,325,228 |
| Southeastern  RVT | 2,504,027 |

Source:  FY22_Chapter 70 Aid and Net School Spending Requirements

# Appendix B: FY22 SOA Evidence-based Program Areas

The FY22 recommended list includes several new additions (in **purple** text in the table) to the original set of 18 and reframes several others (highlighted in **green** text).

## Enhanced Core Instruction

1. Expanded access to full-day, high-quality pre-kindergarten for 4-year-olds, including potential collaboration with other local providers (SOA categories D, F, and G)
2. Research-based early literacy programs in pre-kindergarten and early elementary grades (E, F, and G)
3. Early College programs focused primarily on students under-represented in higher education (I)
4. Supporting educators to implement high-quality, aligned curriculum (E and F)
5. Expanded access to career-technical education, including "After Dark" district-vocational partnerships and innovation pathways reflecting local labor market priorities (I)
6. Culturally responsive teaching and other strategies that create equitable and culturally responsive learning environments for students. (D, E, and F)
7. Expanded learning time for all students in the form of a longer school day or school year (A, B, D, and E)

## Targeted Student Supports

8. Inclusion/co-teaching for students with disabilities and English learners (D and E)
9. English Learner Education programs, including dual language (DL) and transitional bilingual education (TBE) (D, E, and F)
10. Acceleration Academies and/or summer learning to support skill development and accelerate advanced learners (A and E)
11. Dropout prevention and recovery programs (I)

## Talent Development

12. Diversifying the educator/administrator workforce through recruitment and retention (D and H)
13. Leadership pipeline development programs for schools (D and E)
14. Strategies to recruit and retain educators/administrators in hard-to-staff schools and positions (D and E)
15. Increasing opportunities for educators and support staff to engage in a cycle of continuous improvement, utilizing district and school teaming structures (B and E)

## Conditions for Student Success

16. Expanding capacity to address social-emotional learning (SEL) and mental health needs of students and families (C, D, and E)
17. Increasing opportunities for all students to engage in arts, enrichment, world languages, athletics, and elective courses. (D and B)
18. Developing effective family/school partnerships (E)
19. Community partnerships for in-school enrichment and wraparound services (C)
20. Labor-management partnerships to improve student performance (E)
21. Facilities improvements to create healthy and safe school environments (J)

Categories listed in the SOA legislation include: A) Expanded learning time in the form of a longer school day or year; B) Increased opportunity for common planning time for teachers; C) Social services to support students' social-emotional and physical health; D) Hiring school personnel that best support improved student performance; E) Increased or improved professional development; F) Purchase of curriculum materials and equipment that are aligned with the statewide curriculum frameworks; G) Expanded early education and pre-kindergarten programming within the district in consultation or in partnership with community-based organizations; H) Diversifying the educator and administrator workforce; I) Developing additional pathways to strengthen college and career readiness; J) Any other program determined to be evidence-based by the commissioner.

Report to the Legislature: Student Opportunity Act Three-Year Evidence-Based Plans (2023-2024)

# Contents

# Introduction

The Department of Elementary and Secondary Education respectfully submits this Report to the Legislature: *SOA Three-Year Evidence-Based Plans (2023-2024)* pursuant to Chapter 132 of the Acts of 2019, The Student Opportunity Act:

> *Annually, not later than December 31, the commissioner shall submit a report to the clerks of the house of representatives and the senate and the chairs of the joint committee on education on the progress made in addressing persistent disparities in achievement among student subgroups in the aggregate and within subcategories on a statewide basis; provided, however, that district and school-level data shall be made available on the department's website along with the report. (M.G.L. Ch. 69 § 1S (d))*

The Student Opportunity Act (SOA) was enacted in 2019, infusing significant new funding into the Commonwealth's educational system, with the majority directed towards chronically underfunded districts. The SOA legislation adopted  the *Foundation Budget Review Commission*'s October 2015 recommendations, which addressed the state's overall underinvestment in education and revised the Chapter 70 formula used to allocate funds to districts by:

- Raising per pupil funding for English learners; more for those in high schools;
- Increasing special education enrollment and cost assumptions to more accurately reflect district enrollment;
- Increasing funding for districts with high concentrations of poverty; and
- Increasing funding for health care costs of active employees and retirees by basing costs on up-to-date health insurance trend data collected by the state's Group Insurance Commission (GIC)

# Initial Reflections on the Impact of SOA Plans (FY21-FY24)

The first round of SOA Plans was developed and implemented between 2020-2024, against the backdrop of the pandemic and its aftermath. The SOA-Pandemic-ESSER Timeline in Appendix A traces the timeline of SOA Plan development and implementation against: a) the timing of pandemic-related school closures and remote/hybrid learning and b) the funding timeline for new state investments in Chapter 70 aid and federal Elementary and Secondary School Emergency Relief (ESSER) funding.

Please note that at this point in time, it is not possible to establish a direct causal relationship between the provisions of the Student Opportunity Act and reductions in disparities for students.  Much of the data we have about the impact of additional Chapter

70 funds—as well as the substantial pandemic-era federal ESSER funding—is self-reported by districts and is most useful for descriptive purposes.

The Department's SOA Data Advisory Commission recently commissioned the [SOA-ESSER Spending Study](), which seeks to understand how, and the extent to which, the infusions of funding from the Massachusetts state SOA and the federal ESSER funds have impacted public education in Massachusetts compared to the years prior to implementation of these funds. This type of analysis is complex and labor intensive and will take time to understand well.  The research questions for the study appear in Appendix B.

The remainder of this section uses publicly available data to describe some of the indicators of progress the Department is using to track changes over time.

**Distribution of Additional Chapter 70 Aid.**  On July 29, 2024, Governor Healey signed a budget that included almost $7 billion in Chapter 70 aid. The annual amount of Chapter 70 aid is now more than $1.6 billion higher than it was in FY21 when the state began phasing in new investments in education following the passage of the Student Opportunity Act. Additional increases in Chapter 70 aid will continue to be phased in through FY27.

In FY22, the Department designated 25 districts that received $1.5 million or more in additional FY22 Chapter 70 aid as 'high-funding' districts.  The new Chapter 70 funding formula introduced in the SOA legislation, has distributed 61 percent of $1.6 billion in additional Chapter 70 funds that have been phased in since FY22-FY25 to these 25 districts; the remaining 39 percent is distributed across the remaining 294 districts.   This distribution reflects the fact that in the academic year 2023-24, the 25 high-funding districts served 29 percent of the Commonwealth's students, 62 percent of its English learners, just over half (51 percent) of its low-income students, and just under one-third (31 percent) of students with disabilities—groups that are explicitly addressed in the SOA legislation.

**Progress in meeting targets.** The Student Opportunity Act requires the Department to set and report on ambitious 3-year targets for improving student achievement for student groups statewide. Setting those targets was delayed until recently due to pandemic-related interruptions in MCAS testing.

The Department has opted to track statewide progress in gap-closing by tracking progress in MCAS ELA and Math achievement over time for the *lowest performing students group,* as reported via the state's district and school accountability system.  By definition, this group includes the students who currently demonstrate the lowest levels of achievement within their school or district and therefore need the most significant levels of support to reduce the disparities between their performance and that of their peers. This group typically includes substantial proportions of a district's high-needs population, as well as other student groups that the Student Opportunity Act intends to support (i.e., English Learners,

students with disabilities, students of color, etc.) This makes it a good proxy for assessing the progress of multiple student groups and streamlines the analysis and reporting process. Additional detail is available in the technical document *Establishing the Lowest Performing Students Group*.

Table 1 displays the state's progress in meeting the FY24 targets set for all students and for the state's lowest-performing student group for MCAS English Language Arts and Mathematics.  The SOA legislation calls for the Department to track progress in meeting targets for achievement outcomes.  Data for chronic absenteeism are included in the table below because the Department hypothesizes that the reduction in chronic absenteeism over time will serve as a leading indicator of improvement in MCAS achievement and other student outcomes.

**Table 1: Statewide progress in meeting FY24 targets for selected indicators**

| Indicator | | Non-High School | | High School | |
|---|---|---|---|---|---|
| | | **All students** | **Lowest performing student group** | **All students** | **Lowest performing student group** |
| **Achievement** | **ELA** | Declined | Improved below target | No change | Improved below target |
| | **Math** | Improved below target | Improved below target | No change | No change |
| **Chronic Absenteeism** | | Exceeded target | Met target | Met target | Improved below target |

Source:  DESE State Profile:  2024 Official Accountability Report

Note:  Details on the criteria for determining progress toward improvement targets are available in the School Leader's Guide to the 2024 Accountability Determinations.  The 2023 Accountability Targets and 2024-2027 Increments file details statewide targets and targets for individual districts in 2024.

➢ The results for progress in meeting FY24 achievement targets for the lowest performing students group are more positive than for students in the aggregate.
➢ Although the lowest performing students group did not meet its achievement targets for FY24, it saw improvement, albeit below target, in English language arts (for non-high school and high school students) and in Mathematics (for non-high school students).
➢ The state met its target for reducing chronic absenteeism for the lowest performing students group for non-high school students, and made improvements at the high school level, albeit below target.

**Progress in reducing disparities.** The data in Table 2 provides a useful lens for taking stock of the progress the lowest-performing students group made between spring 2023 and spring 2024 relative to students in the aggregate.

**Table 2: Progress in narrowing gaps for the lowest-performing students group**

| English Language Arts Achievement - MCAS average composite scaled score | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Non-High School** | | | | **High School** | | | |
| **Year** | **All students** | **Lowest performing students** | **Achievement gap** | **Year** | **All students** | **Lowest performing students** | **Achievement gap** |
| Spring 2023 | 493.9 | 464.3 | 29.6 | Spring 2023 | 503.6 | 477.3 | 26.3 |
| Spring 2024 | 493.1 | 465.9 | 27.2 | Spring 2024 | 503.6 | 479.5 | 24.1 |
| **Decrease in gap (Spring 2023 to Spring 2024) =** | | | **2.4** | **Decrease in gap (Spring 2023 to Spring 2024) =** | | | **2.2** |
| Mathematics achievement - MCAS average composite scaled score | | | | | | | |
| **Non-High School** | | | | **High School** | | | |
| **Year** | **All students** | **Lowest performing students** | **Achievement gap** | **Year** | **All students** | **Lowest performing students** | **Achievement gap** |
| Spring 2023 | 494.2 | 465.9 | 28.3 | Spring 2023 | 500.4 | 476.8 | 23.6 |
| Spring 2024 | 494.7 | 470.1 | 24.6 | Spring 2024 | 500.2 | 476.8 | 23.4 |
| **Decrease in gap (Spring 2023 to Spring 2024) =** | | | **3.7** | **Decrease in gap (Spring 2023 to Spring 2024) =** | | | **0.2** |
| Chronic absenteeism rates | | | | | | | |
| **Non-High School** | | | | **High School** | | | |
| **Year** | **All students** | **Lowest performing students** | **Rate gap(%)** | **Year** | **All students** | **Lowest performing students** | **Rate gap (%)** |
| Spring 2023 | 18.4% | 26.2% | -7.8% | Spring 2023 | 26.4% | 36.0% | -9.6% |
| Spring 2024 | 15.7% | 24.2% | -8.5% | Spring 2024 | 25.2% | 31.7% | -6.5% |
| **Increase in gap (Spring 2023 to Spring 2024)=** | | | **0.7%** | **Decrease in gap (Spring 2023 to Spring 2024) =** | | | **3.1%** |

Source:  DESE State Profile:  [2024 Official Accountability Report]

- Between spring 2023 and spring 2024, the lowest performing students group saw modest improvements relative to students in the aggregate in average composite scaled scores in English language arts for non-high school and high school students and in Mathematics for non-high school students.
- The gap in the chronic absenteeism rate for non-high school students in the lowest-performing students group increased relative to that of students in the aggregate. Even though the lowest performing students group met its targets for reducing chronic absenteeism, students in the aggregate exceeded the target for reducing chronic absenteeism; as a result, the gap widened.
- Chronic absenteeism for high school students in the lowest performing students group resulted in a more robust narrowing of disparities than for high school students in the aggregate.

Tables 1 and 2 track progress for a single year and generally reflect positive progress for the lowest-performing students group.  The Department is committed to supporting and strengthening a positive trajectory over time for all students and will continue to maintain a

focus on fostering robust improvement for students experiencing the greatest disparities in order to foster ongoing narrowing of achievement gaps.

**A closer look at progress in meeting targets for all districts and high-funding districts.** The SOA-ESSER Spending Study mentioned earlier in this report, will explore the impacts of SOA and ESSER funding, particularly for those districts that received, and will continue to receive via Chapter 70, substantial infusions of funding.

Table 3 offers a closer look at the distribution of districts overall and high-funding districts that either met or exceeded targets or improved below targets.  These data are shared for illustrative purposes. Due to the small numbers of high-funding districts relative to all districts, we urge caution in interpreting small differences in percentages between the high-funding districts and all districts.

**Table 3: Distribution of districts that met/exceeded targets or improved below targets**

| Indicator | Progress towards meeting targets | Non-High School | | High School | |
|---|---|---|---|---|---|
| | | All districts (%) N=267 | High-funding districts (%) N=20 | All districts (%) N=221 | High-funding districts (%) N=25 |
| **ELA Achievement** | **Met/exceeded** | 18.7% | 15.0% | 36.2% | 36.0% |
| | **Improved below target** | 62.9% | 80.0% | 37.6% | 40.0% |
| | **Improved below target + Met/exceeded target** | 81.6% | 95.0% | 73.8% | 76.0% |
| **Mathematics Achievement** | **Met/exceeded** | 62.9% | 90.0% | 21.3% | 4.0% |
| | **Improved below target** | 35.6% | 10.0% | 36.7% | 56.0% |
| | **Improved below target + Met/exceeded target** | 98.5% | 100.0% | 58.0% | 60.0% |
| **Chronic Absenteeism** | **Met/exceeded** | 46.8% | 60.0% | 54.7% | 56.0% |
| | **Improved below target** | 14.2% | 10.0% | 14.5% | 16.0% |
| | **Improved below target + Met/exceeded target** | 61.0% | 70.0% | 69.2% | 72.0% |

Source:   FY24 Accountability Data
Note:     Data do not include charter schools.
          Details on the criteria for determining progress toward improvement targets are available in the School Leader's Guide to the 2024 Accountability Determinations.

Note:  Number of high-funding districts differs for non-high school and high schools because the sample includes five regional vocational technical schools that do not serve k-8 students.

# Summary of Key Activities in FY24

Most activities between July 1, 2023, and June 30, 2024, centered on planning and preparation for collecting a new round of 3-year gap-closing plans from districts, plan data collection, and the plan review process. Key activities that will be described in greater detail below include:

1. Publicly posting FY23 SOA Progress Reports
2. Planning and preparation for new 3-year SOA Plans covering implementation years FY25-FY27
3. Plan data collection
4. Reviewing SOA Plans
5. Creating a SOA Summary Report
6. Supporting the ongoing implementation of evidence-based practices

1. **Publicly posting FY23 SOA Progress Reports.**
Districts' FY22 SOA Plan Amendments were updated with information from their FY23 SOA Progress Reports. The updated [SOA Dashboard](#), along with instructions for utilizing it, was posted on the Department's [SOA Web pages](#) in fall 2023.

2. **Planning and preparation for new 3-year SOA Plans covering implementation years FY25-FY27**.
DESE applied lessons learned from the first round of SOA Plan development and implementation to produce new resources and improved guidance to support districts in developing stronger and more focused plans. The timing of new SOA Plans also presented a welcome opportunity to better align SOA plans with evolving Department priorities as the country emerged from the pandemic. Core improvements and updates included:

   a. **Aligning evidence-based programs with the Department's new [Educational Vision and Strategic Objectives](#).** The Department's Educational Vision, introduced to districts in April 2023, articulated three strategic objectives:
   **Strategic Objective 1:** Cultivate systems to support the whole student and foster joyful, healthy, and supportive learning environments so that all students feel valued, connected, nourished, and ready to learn;
   **Strategic Objective 2:** Promote deeper learning so that all students engage in grade-level work that is real-world, relevant, and interactive;
   **Strategic Objective 3:** Develop and sustain a workforce that is diverse, culturally responsive, well-prepared, and committed to continuous improvement, so that all students have equitable access to effective educators.

   Each strategic objective encompasses three to four focus areas. In advance of collecting new 3-year plans, the Department examined the research and

evidence base to further identify examples of high-quality evidence-based programs (EBPs) aligned with each of the ten focus areas. The full list of strategic objectives, focus areas, and evidence-based programs, as well as a crosswalk of the 2024 EBPs against the original SOA Programs in the SOA legislation, appears in Appendix D.

The selection of EBPs that districts will use to drive improvements for selected student groups continues to represent the core of districts' SOA Plans. While each of the 2024 EBPs represent strong programmatic practices, districts were especially encouraged to consider and adopt EBPs designated as "priority EBPs" by the Commissioner. These included: *Targeted Academic Support and Acceleration; Inclusive Curriculum Adoption Process; Supporting Curriculum Implementation; Comprehensive Approach to Early Literacy and Early Literacy Screening and Support; Expanded Access to Pre-K; High Quality Secondary Pathways and Programs; and Enhanced Pathways to Increase Educator Diversity*.

**Setting statewide improvement targets.** As described at the beginning of this report, the Department also sets district targets for the lowest-performing student group. District progress for the lowest-performing student group will be tracked over time against statewide targets. Districts also have the option of setting other achievement targets in the aggregate and/or for additional student groups.

Districts also identified a set of recommended metrics related to the evidence-based programs in their plans that they would use to monitor their interim and longer-term progress in reducing disparities for student groups. The Strategic Objectives Table in Appendix E, which appears in the [FY24 SOA Plan Guidance Materials](#), provided districts with a set of recommended benchmarks for each evidence-based program in the table.

b. **New data resources to support plan development.** The Department developed a new data analytic tool, the  [Student Outcomes Comparison Tool,](#) to provide districts with an at-a-glance perspective of critical indicators across multiple student groups to help them begin to pinpoint where disparities in learning experiences and outcomes are most prominent. This tool is intended to serve as a supplement to other publicly available tools and interim district assessment data.
Where districts' original data analyses in FY20 and FY22 leaned heavily on MCAS outcomes, the student outcomes data tool highlights other critical indicators including *chronic absenteeism, out-of-school suspensions, ninth-grade course passing, pathways enrollment, and data on dropout and 5-year graduation*. The tool includes a district heat map feature, which provides a graphical

representation of data where values are depicted by color.  Data points in dark red note where student groups are experiencing the greatest disparities.

c.  **Streamlining and refining the collection of resource allocation data.** In this round of plans, the budgetary data collected is streamlined and simplified. Districts projected the total dollar amount across all funding sources[1] over the next three years (i.e., FY25-FY27) that they expect to invest to support the implementation of each EBP.  This is in contrast with the original plans, which collected information about anticipated expenditures for each EBP on a year-to-year basis.  Districts continue to provide summary information on the Foundation categories in which funds will be used to support implementation.  So as not to lose the opportunity to learn more about the impact of additional Chapter 70 funding on districts, the Department is continuing to collect more detailed fiscal information from districts benefiting the most from new investments in Chapter 70 and the new funding formula introduced with the SOA legislation. Seventeen districts receiving $75 million or more in *total* Chapter 70 funds in FY24 were identified as priority districts.  (See Appendix E for a list of priority districts.) Note that beginning with the new round of plans, the Department shifted its basis for identifying priority districts from the amount of additional year-over-year funding a district receives to the total Chapter Aid funding a district receives.  Sixteen of the 17 districts now identified as priority districts were also identified as priority districts using the previous criteria.

In addition to the SOA Plan required for all districts, the 17 priority districts completed an *SOA Plan Addendum*. The SOA Plan Addendum asked districts to reflect upon and describe how the additional Chapter 70 funds – in conjunction with investments from other funding sources – enabled them to transform how their district serves students who have experienced the greatest disparities in their educational opportunities and outcomes. Districts also provided prospective budget data on anticipated investments for all EBPs for FY25-FY27. The SOA Plan Addendum budget data will be utilized in the SOA-ESSER spending study described earlier in this report.

d.  **New Data Collection Platform.**  The Department moved plan data collection from a commercial survey data collection platform to the Department's [Grants for Education Management System](#) (GEM$). This move resulted in a more efficient and streamlined process that permitted data collection, review and revision of plans, and public posting of plans within a single platform. From the district perspective, GEM$ allowed formatted text and permitted districts to include data tables and graphs, which makes plans more user-friendly for

---

[1]  All local funding sources, including state Chapter 70 allocations; Federal Title grants; other federal and state grants; other resources

stakeholders to read. The process of accessing plans is still user-friendly, and the public can either read plans online within the GEM$ system or download and print a copy of the plan directly from GEM$.

e. **Stakeholder Engagement.**  Throughout this process, an array of internal DESE stakeholders and external stakeholders were engaged as the Department moved from strategy development to implementation. Members of the core SOA implementation team engaged with internal stakeholders from the Commissioner's Office, the Office of Planning and Research, the Center for Accountability, and the cross-agency Strategic Objective Working Group.  At key points in the process, external stakeholders provided valuable input that is reflected in resulting processes and resources.  The new plan template was informed by input from the Massachusetts Association of School Superintendents (M.A.S.S.).  Input from the Massachusetts Business Alliance for Education (MBAE) informed target setting, as well as financial data collection for districts receiving a significant amount of Chapter 70 funding.

3. **Plan Data Collection.** Detailed [SOA plan guidance](#) and resources to support plan development were released in January 2024, with a primary collection of SOA plans taking place between January 2024 and April 1, 2024.  The Department offered an overview webinar to districts in January 2024; a recording of the webinar and accompanying slide deck were subsequently posted on the SOA District Resources page, along with the FY24 SOA Plan guidance and other resources.  The Department also held webinars for the Urban Superintendents Network for districts completing the SOA Plan Addendum and for the Massachusetts Association of School Business Officials (MASBE).

Written resources posted on the SOA District Resources page were complemented by opportunities for districts to request ½ hour consultations with the SOA team as they prepared their updates. The SOA team conducted consultations with 55 districts during the course of data collection.  The SOA team also maintains a dedicated mailbox ([SOAPlans@mass.gov](mailto:SOAPlans@mass.gov)) to which districts can submit questions.

4. **Reviewing SOA plans.**  The bulk of SOA Plans received an initial review in the two weeks following the April 1, 2024, due date.  SOA Plans were reviewed with an eye toward assessing whether a district's SOA plan met the letter and the spirit of the Student Opportunity Act.

Reviewers took part in a robust training and calibration process prior to reviewing plans independently.  Plans for priority districts were reviewed by at least two team reviewers, including a member of the SOA leadership team. Plans for other districts had a single

reviewer, and a sample of plans was spot-checked by members of the leadership team to ensure consistency across reviewers. The SOA Plan Checklist used by the review team appears in Appendix F.   Reviewers were able to work directly in the GEM$ system described above to flag areas requiring additional detail. Districts then made necessary adjustments for DESE review and final approval.

5. **Creating a [FY24 SOA Summary Report](.)** A summary report based on SOA Plan data was developed after the review process was completed.  Following a brief overview of the Student Opportunity Act and the purpose of SOA Plans, the report provides a useful descriptive summary of what districts across the Commonwealth are prioritizing in the SOA Plans they will be implementing between FY25–FY27.

6. **Supporting the ongoing implementation of evidence-based practices.**  The Department provides a wide array of implementation supports aligned to its Educational Vision.  These include evidence-based grant opportunities, professional learning opportunities, tools, and guidance and are described for districts in the [Department's Catalog of Aligned Supports](.).

## Areas for Further Exploration

The [FY24 SOA Summary Report](.) described above provides an overview of the content of SOA Plans submitted by districts for implementation from SY24-25 through SY26-27. While the summary tables are not repeated here, the areas for further exploration described below are those that appear at the end of that report.

The Department recognizes that beyond written plans, high-quality implementation of those plans largely determines the ultimate impact on students. To that end, we are exploring ways to shift our focus primarily from the activity of collecting and reviewing plans towards providing high-quality implementation support that meaningfully aids districts in improving outcomes for historically underserved students.

**Increased Focus on Implementation Support.** While required by statute, SOA Plans in and of themselves are not comprehensive district improvement plans. It is important to remember that districts were encouraged to select a relatively small, focused number of EBPs in their SOA Plan. As a result, a district may not have selected a given EBP as part of their SOA Plan but work on that strategy could still be underway.

While the Department has made efforts to support districts in SOA Plan development through enhanced guidance, new data analysis tools, and technical assistance, in several sections of the submitted SOA Plans, the narratives varied in terms of the level of data and detail provided. Especially for districts that received minimal increases in their Chapter 70

allocation, the SOA reporting requirements were sometimes experienced as distinct from the core, authentic planning opportunity that was intended by the guidance.

Moving forward, we are exploring how the Department can meaningfully harness the data we have about districts' improvement efforts and put greater focus on adaptive implementation assistance. Potentially shifting the Department's efforts more towards implementation support could help illuminate where supports are most warranted. In addition, aligning these efforts more tightly around districts' improvement plans could increase the coherence and effectiveness of districts' efforts to address gaps and learning loss.

**Adapting Universal Strategies to Support Specific Student Groups.** A vast majority of districts identified students with disabilities and/or English learners as their student groups to receive focused support. Meanwhile, several of the most selected EBPs (e.g., curriculum adoption and implementation) are universal strategies designed to enhance the educational experience of all students. Plan narratives varied in the extent to which they made an explicit connection to how the EBP would improve outcomes for targeted student groups. We believe this represents an important opportunity for the Department to curate, develop, and disseminate resources that support districts in adapting certain EBPs to meaningfully address the strengths and needs of specific student groups.

**Building and Sustaining a Diverse and Effective Workforce.** We know that district leaders value the research that consistently shows that having a diverse and effective workforce is one of the most influential factors in students' academic and post-academic success. Although relatively few districts (8%) selected EBPs from this strategic objective, we recognize that districts are investing in this priority in ways that may not be easily observed in SOA plans.

For example, investments in sustaining a diverse and effective workforce may be reflected in other line items of the plan (e.g., hiring highly qualified educators to support early literacy efforts through EBP 2.1D). It is also possible that districts are using other funding sources to support this work and their strategies are articulated in their district improvement plans. Further examination may be warranted.

# Looking Forward

The Department is already in the process of developing guidance and templates for the annual SOA Progress Reports districts will submit in April 2025. Updates will focus on the first year of implementation for new SOA Plans and the progress they are making in reducing disparities for student groups experiencing gaps in learning experiences and outcomes.

In the longer term, the Department is exploring ways to better align comprehensive district improvement and SOA planning processes in ways that are more efficient and effective in driving outcomes for students.  The goal is to have an aligned process in place well in advance of 2027 when the next round of SOA Plans is due.

The Department is committed to leveraging the SOA Planning process alongside the implementation resources and supports described in the Department's Catalog of Aligned Supports to drive ongoing progress in narrowing disparities for student groups.

# Appendix A: SOA – Pandemic - ESSER Timeline

| SOA-Pandemic-ESSER Timeline | |
| --- | --- |
| **FY 2020** | |
| November 26, 2019 | Student Opportunity Act legislation is signed into law |
| March 2020 | Schools close due to pandemic |
| April 1, 2020 | Original due date for SOA plans (postponed to January 2021) |
| **FY 2021** | |
| July 2020 | Federal ESSER I funds totaling over $194 million allocated to districts |
| December 14, 2020 | FY21 state budget is signed; includes no additional Chapter 70 funds |
| January 15, 2021 | Revised due date for original SOA plans |
| **FY 2022** | |
| July 16, 2021 | Over $219.6 million in additional Chapter 70 funds allocated to districts |
| August 2021 | Federal ESSER II funds totaling almost $740 million allocated to districts |
| April 1, 2022 | Robust SOA Plan Amendments due to the Department |
| September 2022 | All schools return to in-person learning |
| **FY 2023** | |
| July 28, 2022 | Almost $495 million in additional Chapter 70 funds is allocated to districts |
| Fall 2022 | Federal ESSER III funds totaling almost $1.66 billion allocated to districts, $331 million of which represents a 20 percent set-aside required to address loss of instructional time |
| April 1, 2023 | SOA Progress Updates due |
| **FY 2024** | |
| August 9, 2023 | An additional $595 million in Chapter 70 aid is allocated to districts |
| April 1, 2024 | New 3-year SOA Plans submitted (implementation period = FY25-FY27) |
| **FY25** | |
| July 29, 2024 | Just over $309 million in additional Chapter 70 aid is allocated to districts |

# Appendix B: Study of SOA and ESSER Spending in Massachusetts

RESEARCH QUESTIONS

In general, the Study of SOA and ESSER Spending in Massachusetts seeks to understand how, and the extent to which, the infusions of funding from the Massachusetts state SOA and the federal ESSER funds have impacted public education in Massachusetts compared to the years prior to implementation of these funds. The research questions are as follows:

> 1) How did districts and schools use SOA and ESSER funds? What are the patterns of spending? Do similar types of districts, based on characteristics like district size, and student groups served, have similar patterns of spending (based on categories)? To what degree were SOA and ESSER funds used for similar or divergent activities?
>
> 2) To what extent has the additional funding under the SOA and ESSER funds been targeted to the intended populations (low-income students, ELs) in districts and schools? To what extent have these funds been allocated and distributed to districts and schools that disproportionately serve these student groups?
>
> 3) To what extent has the growth in required local contributions under the SOA, as well as the state's distribution of SOA funding to districts and schools been more equitable than the distribution of Chapter 70 funds in the years prior to SOA?
>
> 4) What are trends in SOA and ESSER spending, separately and jointly, at the district level, relative to district spending in the years prior to SOA and ESSER (i.e., what categories of spending have increased, decreased, or stayed constant) in total dollars and proportionally?
>
> 5) What are trends in SOA and ESSER spending, separately and jointly, at the school level, relative to school-level educational spending the years prior to SOA and ESSER (i.e., what categories of spending have increased, decreased, or stayed constant, both over time and relative to one another)?
>
> 6) To what extent did Massachusetts public school districts use these funds to build capacity by funding investments that will continue after ESSER funding ends? Which evidence-based practices were invested in?
>
> 7) To what extent can we quantitatively identify spending (in categories or programs) that has had a high impact (i.e., has led to improved student outcomes, for example, attendance, discipline, course completion, etc.? To what extent can we quantitatively identify categories of spending that seemed to be high-impact and/or cost-effective (e.g., has shown a positive return on investment)?

# Appendix C: "High Funding Districts" receiving $1.5 million or more in additional Chapter 70 aid in FY22 (N=25)

| District | Increase in FY22 Chapter 70 aid (compared to FY21) |
|---|---|
| Boston | 1,821,120 |
| Brockton | 23,148,786 |
| Chelsea | 9,322,330 |
| Chicopee | 3,417,947 |
| Everett | 9,334,212 |
| Fall River | 8,166,479 |
| Fitchburg | 3,540,254 |
| Haverhill | 1,632,480 |
| Holyoke | 3,900,517 |
| Lawrence | 15,287,211 |
| Lowell | 11,599,005 |
| Lynn | 14,079,365 |
| New Bedford | 7,654,680 |
| Quincy | 3,224,569 |
| Randolph | 1,680,580 |
| Revere | 10,652,533 |
| Springfield | 26,179,139 |
| Taunton | 2,258,563 |
| Westborough | 2,879,155 |
| Worcester | 13,719,650 |
| Greater Fall River RVT | 1,544,809 |
| Greater Lawrence RVT | 2,031,222 |
| Greater New Bedford  RVT | 1,571,894 |
| Greater Lowell RVT | 2,325,228 |
| Southeastern  RVT | 2,504,027 |

Source:  FY22 Chapter 70 Aid and Net School Spending Requirements

# Appendix D: Crosswalk of SOA Program Categories and 2024 Evidence Based Programs (EBPs) Crosswalk and Strategic Objectives Tables

| SOA Program Category | 2024 EBPs as referenced in the Strategic Objectives table below |
|---|---|
| A) Expanded Learning Time in the form of a longer school day or year | *2.2D Targeted Academic Support and Acceleration;* 2.4B Extended Learning Time; 2.4D Diverse Enrichment Opportunities |
| B) Increased opportunity for common planning time for teachers | 2.2C Collaborative Teaching Models; 3.3B Support for Effective Team Practices; 3.3C Collaborative Labor Management Partnerships |
| C) Social services to support students' social-emotional and physical health | 1.1A Integrated Services for Student Wellbeing; 1.1B Enhanced Support for SEL and Mental Health; 1.1C Positive School Environments; 1.2A Effective Student Support System; 1.2B Comprehensive Tiered Supports |
| D) Hiring school personnel that best support improved student performance | 3.1A Intentional Hiring Systems; 3.1C Educator Preparation Partnerships |
| E) Increased or improved professional development | 1.3A Diverse Approaches to Meaningful Family Engagement; 2.2A Effective Use of WIDA Framework; 2.2B High Leverage Practices for Students with Disabilities; 3.2C Pathways for Professional Growth and Leadership |
| F) Purchase of curriculum materials and equipment that are aligned with the statewide curriculum frameworks | 2.1A Inclusive Curriculum Adoption Process; 2.1B Supporting Curriculum Implementation; *2.1C Comprehensive Approach to Early Literacy; 2.1D Early Literacy Screening and Support* |
| G) Expanded early education and pre-kindergarten programming within the district in consultation or in partnership with community-based organizations | *2.4A Expanded Access to Pre-K* |
| H) Diversifying the educator and administrator workforce | *3.1B Enhanced Pathways to Increase Educator Diversity*; 3.2A Inclusive School Communities; 3.2B Retention Support Programs |
| I) Developing additional pathways to strengthen college and career readiness | 2.3A Authentic Postsecondary Planning; *2.3B High-Quality Secondary Pathways and Programs* |
| J) Any other program determined to be evidence-based by the commissioner | 1.3B Students and Families as Valued Partners; 2.4C Effective Programming for Multilingual Learners; 3.3A Resources Allocation Aligned to Student Success |

Note: 2024 EBPs in bold italics are designated as Commissioner's Priorities

# Strategic Objectives Tables

**Strategic Objective 1: Cultivate systems to support the whole student and foster joyful, healthy, and supportive learning environments so that all students feel valued, connected, nourished, and ready to learn**

| Focus Area | Evidence-Based Programs | | Suggested Metrics |
|---|---|---|---|
| **1.1 Promote students' physical and mental health and wellness in welcoming, affirming, and safe spaces** | 1.1A | **Integrated Services for Student Wellbeing**: Utilize a system for integrating services and aligning initiatives that promote students' behavioral and mental health and wellness (e.g., bullying prevention, trauma sensitivity, dropout prevention, truancy reduction, foster care and homeless youth education, and inclusion of students with disabilities) | **Local Metrics**<br><br>● Change in select indicators from local student surveys that measure school culture/climate and student mental health and wellbeing<br>● Increase in implementation of Tier 1 SEL curriculum<br>● Change in social and emotional competency rates as measured by SELIS or local data<br>● Change in select indicators on local family surveys<br>● Increase in participation rates for SEPAC/ELPAC and/or other stakeholder groups<br><br>**DESE Provided Metrics**<br>● Increase in student perception of school culture and climate as measured by VOCAL data<br>● Decrease in discipline rates<br>● Decrease in out of school suspension and expulsion rates<br>● Decrease in chronic absenteeism rates<br>● Decrease in dropout rates |
| | 1.1B | **Enhanced Support for SEL and Mental Health**: Expand capacity to address social-emotional learning (SEL) and mental health needs of students and families (e.g., build knowledge and skills of staff, add specialized support staff, partner with community-based providers, strengthen plans for responding to behavioral health medical emergencies, etc.) | |
| | 1.1C | **Positive School Environments:** Create school environments that include high-quality facilities, healthy meals, physical activity, and positive youth development activities for all students | |
| **1.2 Implement a multi-tiered system of supports (MTSS) that helps all students progress both academically and in their social, emotional, and behavioral development** | 1.2A | **Effective Student Support System:** Implement key systems to build an effective approach to MTSS (e.g., using data to identify students' strengths and needs, matching students with appropriate supports, and monitoring progress) | |
| | 1.2B | **Comprehensive Tiered Supports**: Provide a comprehensive set of tiered supports for all learners across all three domains - academic, social/emotional, and behavioral - that are culturally sustaining and universally designed | |
| **1.3 Develop authentic partnerships with students and families that elevate their voices and leadership in decision-making and connect them to their communities** | 1.3A | **Diverse Approaches to Meaningful Family Engagement:** Train all staff on multiple strategies and tools to engage with families in meaningful two-way communication | |
| | 1.3B | **Students and Families as Valued Partners:** Create opportunities and systems for students and families to effectively participate as partners in authentic decision-making, with supports as needed | |

**Strategic Objective 2: Promote deeper learning so that all students engage in grade-level work that is real-world, relevant, and interactive**

| Focus Areas | Evidence-Based Programs | | Suggested Metrics |
|---|---|---|---|
| **2.1 Select and skillfully implement high-quality and engaging instructional materials that support culturally and linguistically sustaining practices and foster deeper learning** | 2.1A | **Inclusive Curriculum Adoption Process**: Implement a comprehensive and inclusive curriculum adoption process that engages multiple stakeholders in the exploration and assessment of potential instructional materials | **Local Metrics**<br>● Increase in HQIM adoption rates<br>● Increase in efficacy of HQIM implementation as measured by classroom walkthrough tools<br>● Increase in usage of approved literacy screeners and adoption of comprehensive early literacy curriculum<br>● Decrease in students requiring Tier 2 and Tier 3 supports as measured by local data<br>● Increase in MyCAP participation and engagement rate<br>● Increase in Pre-K seats/enrollment<br>● Increase in Kindergarten readiness rates as measured by local data<br>● Increase in Dual Language Education (DLE) seats/enrollment<br>● Increase in academic language achievement of English learners as measured by local data<br>● Increase in student participation in arts and enrichment<br><br>**DESE Provided Metrics**<br>● Increase in % of students meeting or exceeding on Math, ELA, and Science MCAS<br>● Increase in MCAS SGP on Math and |
| | 2.1B | **Supporting Curriculum Implementation**: Engage teachers in professional development linked directly to the curriculum and set up a process to regularly monitor the effectiveness of curriculum implementation | |
| | 2.1C | **Comprehensive Approach to Early Literacy:** Develop and implement a comprehensive approach to early literacy education that is supported by high-quality literacy core curricular materials that encompass foundational skills | |
| | 2.1D | **Early Literacy Screening and Support**: Administer a reliable early literacy screening assessment to identify students who require additional support. Provide research-based interventions tailored to each student's learning needs and delivered by appropriately trained staff members | |
| **2.2 Use the MTSS process to implement academic supports and interventions that provide all students, particularly students with disabilities and multilingual learners, equitable access to deeper learning** | 2.2A | **Effective Use of WIDA Framework:** Train all staff to effectively employ the WIDA framework so they can provide effective scaffolds and supports for multilingual learners | |
| | 2.2B | **High Leverage Practices for Students with Disabilities:** Train all staff in high-leverage instructional practices designed for students with disabilities. (e.g., providing scaffolded supports, explicit instruction, flexible grouping, and adapting curriculum and tasks based on students' specific learning goals) | |
| | 2.2C | **Collaborative Teaching Models:** Develop or expand co-teaching and other evidence-based models that leverage collaboration to best-serve students with disabilities and multilingual learners | |
| | 2.2D | **Targeted Academic Support and Acceleration:** Implement academic intervention and acceleration opportunities targeting student groups demonstrating the largest gaps in achievement (e.g., high dosage tutoring, Acceleration Academies, and summer learning) | |

| | | | ELA MCAS |
|---|---|---|---|
| **2.3** Reimagine the high school experience so that all students are engaged and prepared for post-secondary success | 2.3A | **Authentic Postsecondary Planning:** Implement a process that engages students in authentic postsecondary planning through a continuum of learning focused on the unique interests, skills, and talents of each individual student | • Increase in % of English learners making progress on the ACCESS |
| | 2.3B | **High-Quality Secondary Pathways and Programs:** Pursue designation and implementation of high-quality pathways and programs (e.g., Early College, Chapter 74 Career Technical Education including After-Dark programs, Innovation Career Pathway programs, Career Connections programs, and/or other career-connected activities) | • Increase in pathway/program enrollment rates<br>• Increase in completion of advanced coursework rates<br>• Increase in FAFSA completion rates<br>• Increase in 4- and 5-year graduation rates |
| **2.4** Develop a coherent and holistic range of programming that is responsive to the needs and interests of diverse learners | 2.4A | **Expanded Access to Pre-Kindergarten:** Expand access to full-day, high-quality pre-kindergarten programs for 4-year-olds, including potential collaborations with local providers | • Increase in college enrollment/persistence rates |
| | 2.4B | **Extended Learning Time:** Add time to the school day or year for all students and creatively reorganize the school day/year to both enhance the quantity and quality of core instruction and to offer expanded enrichment opportunities | |
| | 2.4C | **Effective Programming for Multilingual Learners:** Develop or enhance research-based programs for multilingual learners that support and sustain students' native languages while also addressing their educational needs and language development | |
| | 2.4D | **Diverse Enrichment Opportunities:** Provide students with a diverse array of opportunities to engage in arts, enrichment, electives, athletics, and world language courses | |

## Strategic Objective 3: Develop and sustain a workforce that is diverse, culturally responsive, well-prepared, and committed to continuous improvement, so that all students have equitable access to effective educators

| Focus Areas | Evidence-Based Programs | | Suggested Metrics |
|---|---|---|---|
| **3.1 Develop an increased and robust pipeline of diverse and well-prepared educators and leaders** | 3.1A | **Intentional Hiring Systems:** Develop intentional hiring systems and processes that start earlier, include a diverse group of stakeholders, and offer support to teams to identify and mitigate biases | **Local Metrics**<br>● Increase in the diversity of educators and leaders<br>● Decrease in gap between student demographics and staff demographics<br>● Increase in retention of effective educators as measured by local data<br>● Decrease in equity gaps in student access to educators who are experienced, effective, and teaching in-field as measured by the Student Learning Experience report in Edwin<br>● Change in select indicators from local educator surveys<br>● Increase in % of staff participating in selected professional learning opportunities<br><br>**DESE Provided Metrics**<br>● Increase in diversity of educators<br>● Increase in diversity of educators, new hires<br>● Increase in principal retention rates<br>● Increase in rate of educators converting emergency licensure to initial as measured by local data<br>● Increase in diversity of educators earning provisional/initial licensure |
| | 3.1B | **Enhanced Pathways to Increase Educator Diversity:** Develop or enhance pathways designed to intentionally attract a diverse pool of candidates (e.g., education-specific pathways for local high school students, "grow your own" teacher preparation programs, and paraprofessional pipelines) | |
| | 3.1C | **Educator Preparation Partnerships:** Partner with educator preparation providers to promote and leverage student teacher placements and other partnerships that result in strong, effective, long-term hiring pipelines | |
| **3.2 Create the conditions to sustain and retain diverse and effective staff, particularly those who entered the field through alternative pathways** | 3.2A | **Inclusive School Communities:** Train all staff in strategies to create an equitable and culturally and linguistically sustaining environment that fosters a sense of belonging for students, families, and staff | |
| | 3.2B | **Retention Support Programs:** Establish or expand induction, mentoring, feedback programs, and affinity groups that are carefully designed to offer targeted support for retaining staff from underrepresented backgrounds, ensuring their sustained engagement and success | |
| | 3.2C | **Pathways for Professional Growth and Leadership:** Create specific roles and/or structures that offer staff professional growth and leadership development (e.g., leaders-in-training programs, coaching roles, etc.) | |
| **3.3 Implement opportunities for all staff to engage in a cycle of continuous improvement, utilizing effective teaming structures** | 3.3A | **Resource Allocation Aligned to Student Success**: Implement a systematic and ongoing process to allocate resources including people, time, funding in alignment with district and school priorities to promote student success | |
| | 3.3B | **Support for Effective Team Practices:** Districts and schools provide all staff with robust training, additional common planning time, and ongoing support in implementing effective team processes, use of protocols, and effective data use as a part of a cycle of inquiry | |
| | 3.3C | **Collaborative Labor-Management Partnerships**: Districts and schools establish and/or maintain collaborative labor-management partnerships to improve student performance | |

## Appendix E: Districts Required to Complete FY24 SOA Plan Addendum

The following districts were required to complete the SOA Plan Addendum. This addendum asks for more detailed information about investments in evidence-based programs, to better understand how they are using SOA funds to drive transformative change for students experiencing persistent disparities in achievement. Districts receiving greater than $75 million in Chapter 70 State Aid in fiscal year 2024 were selected to complete the addendum.

|     | District Name | FY 2024 Chapter 70 Aid |
| --- | --- | --- |
| 1.  | Springfield | $477,737,768 |
| 2.  | Worcester | $357,541,905 |
| 3.  | Lynn | $269,092,167 |
| 4.  | Lawrence | $266,144,831 |
| 5.  | Brockton | $241,067,581 |
| 6.  | Boston | $230,700,785 |
| 7.  | Lowell | $229,138,873 |
| 8.  | New Bedford | $224,099,122 |
| 9.  | Fall River | $188,024,477 |
| 10. | Chelsea | $116,781,512 |
| 11. | Everett | $111,682,212 |
| 12. | Revere | $98,418,182 |
| 13. | Holyoke | $96,959,371 |
| 14. | Taunton | $88,928,648 |
| 15. | Chicopee | $88,827,551 |
| 16. | Framingham | $84,996,534 |
| 17. | Haverhill | $82,633,811 |

# Appendix F: FY24 SOA Plan Rubric – GEM$ Checklist

**Overall Plan**
- The narrative throughout the plan is free of deficit-based language about students, staff, and families.
- Plan addresses between 1-3 of the ten Focus Areas linked to the three Strategic Objectives in DESE's Educational Vision.
- The plan focuses on the implementation of key strategies to close gaps, rather than limiting its scope to a description of how additional Chapter 70 funds will be spent.
- There is internal consistency throughout the plan (e.g., student groups, EBPs)

**Section 1: Summarize Your District's Plan**
- The summary addresses all required elements: student groups targeted, EBPs. Investments, changes anticipated by 2027.
- The narrative is accessible to a general audience.

**Section 2: Analyze Your Data and Select Student Groups for Focused Support**
- The plan prioritizes a limited set of student groups experiencing the most significant gaps. (i.e., does not check every student group in the district)
- The plan describes the measures on which targeted student groups are experiencing the most significant disparities.
- Analysis of disparities and deeper analysis of their underlying causes draws upon multiple types of data (e.g., systems, observational, perspectives, outcomes)
- The selection of EBPs is linked to a deeper analysis of the underlying causes of disparities.

**Section 3: Set Ambitious Three-Year Targets for Improving Student Achievement**
- Additional targets are aligned to selected student groups by subject matter and grade level and to DESE's accountability targets.

**Section 4: Engage Families/Caregivers and other Stakeholders**
- Family/caregiver engagement strategies are clearly articulated and include approaches to support parents in addressing their students' needs.
- The section includes a description of steps the district takes (or plans to take) to engage families/caregivers of targeted student groups.
- The plan for assessing progress in increasing family/caregiver engagement includes a metric that can assess change over time and indicates how it will measure increased engagement for families/caregivers of student groups targeted in this plan.
- Narrative describes ways in which different stakeholder groups provided meaningful input that was used to inform the SOA plan AND describes how/where their perspectives are reflected in the SOA Plan.
- Plans for ongoing engagement of stakeholder groups throughout the implementation of the SOA Plan are described.

**Section 5: Select Evidence-Based Programs to Address Disparities in Outcomes (to be completed for each EBP selected)**

- The district offers a clear description of 1) what is currently being implemented, 2) what changes will be implemented/in place by June 2027, AND aligns to best practice as articulated in guidance.
- The plan describes how EBP implementation will support targeted student groups and/or improve their learning experiences and outcomes.
- The plan clearly indicates which schools will be impacted through the implementation of this EBP.
- The budget provides clear information on budget allocation that aligns to the implementation description and is organized by foundation category.
- Progress monitoring metrics are clearly defined and well-suited to monitoring early and midterm outcomes of the implementation of this EBP.