



Achieve

American Diploma Project Network



Taking Root

*Massachusetts' Lessons for Sustaining
the College- and Career-Ready Agenda*



About Achieve

Achieve, created by the nation's governors and business leaders, is a bipartisan, non-profit organization that helps states raise academic standards, improve assessments and strengthen accountability to prepare all young people for postsecondary education, careers and citizenship.

About the American Diploma Project (ADP) Network

In 2005, Achieve launched the ADP Network—a collaboration of states working together to improve their academic standards and provide all students with a high school education that meets the needs of today's workplaces and universities. The ADP Network members—responsible for educating nearly 85 percent of all our nation's public high school students—are committed to taking four college and career readiness action steps:

- Align high school standards with the demands of college and careers.
- Require all students to complete a college- and career-ready curriculum to earn a high school diploma.
- Build assessments into the statewide system that measure students' readiness for college and careers.
- Develop reporting and accountability systems that promote college and career readiness for all students.

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Education Reform in Massachusetts

Introduction

In 1988, a determined group of business and education leaders set out to transform public education in Massachusetts. “Every Child a Winner!” published in 1991 by the Massachusetts Business Alliance for Education (MBAE), laid out a compelling case for state leaders to take action on an ambitious agenda for improving the school system and student performance, citing the changing global economy and the gaps in Massachusetts’ education system.

This comprehensive reform agenda became one of a handful of conceptual frameworks that led to the landmark legislation first introduced in 1992 and signed into law in June 1993, the Massachusetts Education Reform Act (MERA).

Reform leaders pushed, pulled and cajoled the Legislature into enacting the MERA, which established higher expectations, statewide academic standards and assessments based on the standards; accountability systems for students, schools and districts; management flexibility for superintendents; new educator certification and training rules, including teacher testing; and charter schools. Equally important, the law established a new funding formula that had the effect of reducing local schools’ reliance on property taxes and injecting nearly \$2 billion of additional funds into public education over the course of a decade. This “grand bargain”—reform with resources—enabled significant changes in the commonwealth’s school systems.

Just a few days after the law was signed, the Massachusetts Supreme Court, in *McDuffy vs. Secretary of Education*, ruled that Massachusetts was not meeting its constitutional obligation to provide children in low-wealth school districts with an education that equips them for citizenship and postsecondary training. This ruling helped sustain the commonwealth’s commitment to funding MERA over the next several years.

Today, more than 15 years since the MERA was passed, Massachusetts is consistently near the top of any list of states with the most successful education reform efforts, and its students have made steady and sustained progress over the last decade. In fact, the performance of students and schools has propelled the Commonwealth to the top of the national—and even international—education achievement charts.

- Since 2005, Massachusetts’ 4th and 8th graders have placed first or tied for first on all four subject areas on the National Assessment of Educational Progress (NAEP).
- Massachusetts is the best-performing state in the nation in the percentage of adults age 25 to 64 with a college degree.
- On the 2007 Trends in International Mathematics and Science Study (TIMSS), Massachusetts 4th graders ranked second worldwide in science achievement and tied for third in mathematics; the state’s 8th graders tied for first in science and ranked sixth in mathematics.

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Strategies for Sustaining the College- and Career-Ready Agenda

To give states the information they need to sustain hard-fought education reform effectively, Achieve conducted research on state education reforms that have been sustained successfully for over a decade or more. Funded by the GE Foundation, Achieve hopes this work will help other state leaders, wherever they may be on their road to reform, replicate successful strategies and accelerate systemic reform in their own states, particularly around the college- and career-ready agenda.

The project includes:

- Four case studies that examine both governmental and non-governmental strategies that were effective in making reform last in Indiana, Massachusetts, South Carolina and Texas.
- A paper that draws on and synthesizes the case studies' overarching lessons and states' strategies for sustainability.
- A tool that states can use in their own planning.

The four states were chosen because they were able to pass and sustain significant education reforms over time, for at least a decade. The focus of the case studies is not on the specific policies passed, but rather the process and strategies the states employed to make significant change last.

By all accounts, Massachusetts' journey to education excellence is a model for states around the nation. This case study attempts to capture the lessons that Massachusetts has learned in the 20-plus years it has been working on education reform, particularly with respect to how the commonwealth has successfully sustained its efforts over time. What did Massachusetts do? Who was involved? How did they make it happen? What's kept it going, especially in the face of inevitable opposition?



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Major Milestones

- 1986** — Representative Mark Roosevelt elected to the Massachusetts state Legislature
- 1991** — Governor William Weld enters office
 - Massachusetts Business Alliance for Education (MBAE) releases report, “Every Child a Winner!”, and calls for education reform
- 1992** — Senator Thomas Birmingham elected
- 1993** — The Massachusetts Education Reform Act signed into law
- 1993–96** — Common Core of Learning standards developed
- 1995** — First 15 charter schools open
- 1997** — Governor A. Paul Cellucci enters offices
- 1998** — First MCAS administered to 4th, 8th and 10th graders; statewide teacher certification test required
- 2001** — 10th graders in first class (2003) for whom MCAS is graduation requirement take test
 - Governor Jane Swift enters office
- 2003** — First class required to pass MCAS graduates
 - Governor Mitt Romney enters office
- 2007** — Governor Deval Patrick enters office
 - Massachusetts is one of two states that participates in the Trends in Mathematics and Science Study (TIMSS), an international assessment
- 2008** — Massachusetts’ 4th and 8th graders perform first in the nation on NAEP and near the top on TIMSS
 - Governor Patrick’s Readiness Project releases its 10-year vision for P-20 education

Sustainability Lessons in Massachusetts

Every state—and every reform effort—has its own unique elements, history and political context. While these often make for interesting observations, they are of limited utility for other states trying to create their own education reform plans and manage their own reform efforts. Of more value are lessons and strategies that speak directly to what makes a public-policy change successful and what helps it “stick” in the system.

The following lessons were gleaned from one-on-one and group conversations with individuals who have played key roles in Massachusetts’ education reform efforts. They include elected officials and their staff, government employees, education leaders and practitioners, business leaders, leaders of community nonprofits, and members of the media.

Massachusetts’ Key Strategies for Sustainability

- External champions are essential to build and maintain pressure for change—and support the implementation of reforms over time
- Strong and consistent political and education leadership is vital to sustain reform
- Investing in the reforms over time enables results—and sustainability
- Sticking to the tough reforms even in the face of intense political pressure requires political courage and confidence in the quality of the state’s expectations, measures and procedures
- It pays to engage stakeholders early and often
- Transparency in the development and use of standards and assessments is important to build and maintain support

External champions are essential to build and maintain pressure for change—and support the implementation of reforms over time

As in most other successful states, Massachusetts relied on a combination of inside-the-system and outside-the-system champions—primarily the business community and the media—to push for and sustain education reform.

In the late 1980s, businessman Jack Rennie realized that Massachusetts was not keeping up with global changes. Economically, the state was at risk of falling behind; academically, its students were doing relatively well compared to other states but, like all U.S. students, were getting pummeled by better-prepared students around the world.

With a sense of urgency, Rennie flew into action and, as the founding chairman of the Massachusetts Business Alliance for Education (MBAE), produced the “Every Child a Winner!” report that laid out an ambitious education agenda for the commonwealth and called for far-reaching, standards-based reform.

Many agreed that something needed to change in education, but there were sharply competing ideas about which policies would make the biggest difference, as well as widespread disagreement among key stakeholders about whether all kids could or should achieve at higher levels of performance. When MBAE suggested this proposition at the time, it was a radical notion.

Over the course of three years, from about 1989 to 1992, Rennie, founder and CEO of Pacer Systems, a Massachusetts-based high-tech firm (and a former U.S. Navy-trained fighter pilot), and Paul Reville, a former teacher, the founding executive director for MBAE and today the commonwealth’s secretary of education, crisscrossed the state talking to business groups, rotary clubs, teachers unions and elected officials, beating the drum of education reform and recruiting supporters to what would later become a national model of success.



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Early on, Rennie and Reville partnered with state political leaders, notably then-Senate President Billy Bulger (D) and Speaker of the House Charles Flaherty (D). President Bulger and Speaker Flaherty forged a pact to take on comprehensive education reform with the business community and Governor William Weld, a Republican.¹ They then appointed two talented young committee chairs—Mark Roosevelt in the House and Thomas Birmingham in the Senate—to manage the substance and the deal-making. These two leaders quickly became passionate and dedicated champions of reform.

All along, MBAE also engaged with education stakeholders, discussing the issues, engaging in the complexities, debating points of view—unafraid to take on the “sacred cows” and unwilling to dismiss legitimate concerns. As several observers recalled, the two years leading up to the passage of the legislation were characterized by open dialogue and consensus-building.

After extensive public debate and closed-door negotiations to reconcile different versions of the legislation and wrestle over the toughest reform issues, such as teacher tenure, the Legislature enacted the MERA with broad bipartisan support in 1993. The law is lengthy and complex, containing many innovations and changes to what was then the status quo and specifying a new era of statewide authority.

But, as Senator Birmingham recently reflected, “for all of its multifaceted complexity, the core of the Education Reform Act can be reduced to two, fairly straightforward principles: (1) We will make a massive infusion of state dollars into our public schools and (2) In return, we will demand high standards and accountability from all involved in the education process. This is the ‘grand bargain’ that is education reform in Massachusetts and a good bargain it is both in terms of policy and politics.”

The Role of Business and Foundation Leaders

As the reforms took hold, other business and civic organizations stepped up. The Massachusetts Business Roundtable (MBRT), led by Alan MacDonald, and Asso-

ciated Industries of Massachusetts (AIM) have consistently advocated for MERA and fended off the dozens of legislative attempts each year to undo key tenets of the law. Business for Better Schools, led by former State Street Chief Executive William Edgerly, has pushed for charter schools and more market competition. Mass Insight Education and Research Institute (more commonly known as Mass Insight) has provided substantial “air cover” through its sustained communications about the state’s standards-based reforms to parents and the general public. Civic leaders and foundations—such as The Boston Foundation, Nellie Mae Foundation and others—have provided critical support over the years, as well, through resources, research and nonpartisan leadership.

The business community got the ball rolling and kept pushing—for nearly two decades. Massachusetts’ reform plan would not have been conceived, enacted or sustained if the only champions were a handful of elected officials and state education agency staff. What was needed, and what the business community brought to the table, was pressure for change and the stature to get leaders to pay attention. MBAE, MBRT, AIMS and Mass Insight did the work that is critical to the success of any reform effort, including:

- *Creating the early interest and establishing the urgency:* By tying reform to global competitiveness and the need to keep up with a changing world, MBAE was able to make the necessary case for education reform in Massachusetts.
- *Bringing diverse stakeholders to the table—and serving as a trusted convener—to develop the plan for change:* MBAE purposefully chose to include those who traditionally might align against major reform efforts, such as school boards and teachers’ unions, concluding it was better to engage them at the front end than fight them at the back end. MBAE also set the tone for approaching discussions with integrity and honestly brokered negotiations and disagreements.

¹ Bulger’s and Flaherty’s successors—most notably House Speaker Tom Finneran and Tom Birmingham when he rose to become Senate President—also deserve credit for their continued leadership and commitment to doing right by the policy and financial commitments of MERA.

- *Spreading the word to constituents:* By traveling the state and talking to community, business and education groups, business leaders were able to make their case for reform and explain the specific components on the table to a broad cross-section of stakeholders. Outreach efforts began during the early 1990s, as the reform plan was being shaped and enacted, and continued throughout implementation of the law.
- *Keeping the flame alive:* The Massachusetts business community began the reform effort and stuck with it long after the package had passed through the Legislature—refusing to go away, be quiet or quit pushing, even when things got ugly or messy.

The Media as Champions

As in many states, newspapers in Massachusetts have consistently and loudly championed education reform. From the beginning of the debate over whether a new state compact was needed to the present day, the commonwealth's newspapers of record have, by and large, made education a front-page issue. The editorial pages in particular have consistently supported reform over the status quo.

Ranging from the *Boston Globe* to the *Worcester Telegram & Gazette*, the newspapers' editorial boards have supported charter schools; teacher testing; and the system of student, school and district accountability predicated on the state's assessments, the Massachusetts Comprehensive Assessment System (MCAS). Many observers credit the print media for helping to keep the public spotlight on both the complexity of how to change the vast system of public education and the imperative to do so.

Strong and consistent political and education leadership is vital to sustain reform

External champions can help bring about the climate for change that enables reform, but inside-the-system political leaders are critical to steering the education reform

Key Business-Education Organizations

- **Massachusetts Business Alliance for Education (MBAE):** Established in 1988 by Jack Rennie, then chairman and CEO of Pacer Systems and a major leader in the drive for education reform, MBAE has been a long-time legislative force for the business community in education policy. "Every Child a Winner!", a report it published in 1991, was the basis for the Education Reform Act of 1993. Following the passage of this bill, it refocused their energies toward monitoring the implementation of new standards, funding mechanisms and equitable delivery of education. www.mbae.org
- **Mass Insight Education and Research Institute:** Formed in 1997, Mass Insight provides advocacy for education reform, helps sustain public demand for reform through broad communications, and supports schools and districts as they implement reforms. www.massinsight.com
- **Massachusetts Business Roundtable (MBRT):** An association of chief executive officers from Massachusetts' leading companies, MBRT's Education Task Force has focused in recent years on maintaining the region's competitiveness through innovation and education reform, improving teacher development, advocating for public higher education funding, and supporting early childhood education, primarily through legislative advocacy and partnership building. www.maroundtable.org

efforts. States need elected and appointed officials with the stature to make change happen and the courage to push ahead, even in the face of system inertia or resistance from the status quo. Champions need to be trusted by those in the field and out, they must have a well-tuned ear for politics, and they need to have a keen understanding of the policy that undergirds reform.

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Inside the system, from the early 1990s until today, the cause of education reform in Massachusetts has benefited from the efforts of four governors, several legislators in key leadership positions, five state board of education chairs and countless board members, three education secretaries, three state commissioners of education, and long-serving senior staff at the state education agencies. What separates the commonwealth from other states with strong state-level leadership is the unique cadre of deeply committed education leaders, including urban superintendents, who used the state reforms as both pressure and support to make change in their school systems. It is this broad and deep inside-the-system support and unwavering commitment to the reforms that many observers credit for the commonwealth's sustained success.

There are important lessons from Massachusetts about the types of leaders that need to be engaged, how they are involved and the decisions they make that apply to any state context.

Legislative Champions

Senator Birmingham and Representative Roosevelt were early the champions of the reform package recommended by MBAE. Once MERA was enacted, they were among the leading legislative protectors of the reform, aided by continued strategic and tactical support from the House and Senate leadership. Representative Roosevelt, who later ran for governor and led a prominent Massachusetts think tank, was the reform's key spokesman at the time of the ramp-up to and passage of the MERA.

As Senator Birmingham recounted in a recent speech, "In 1992, in some communities we were spending \$3,000 per child per year and in other communities we were spending \$10,000 per child per year. The absence of a comprehensive statewide system of standards imposed real hardships on poor and minority school districts, which were not only under-funded but also afflicted with society's low expectations as to what their kids could be expected to learn. Before the passage of the Education Reform Act, there were only two state-

imposed requirements to get a diploma in the Commonwealth of Massachusetts: one year of American history and four years of gym."²

Just as critical was these officials' continued involvement over the long years of reform implementation. Many leaders credit Birmingham with single-handedly securing the law's additional funding for schools for well over a decade, until he left the Legislature in 2002. He also championed the line-item appropriation for remediation to help students meet the passing standard on the Massachusetts Comprehensive Assessment System (MCAS). And he stood firm on charter schools despite intense pressure from his colleagues and allies in the state's two teachers' associations.

As Senator Birmingham moved up the ranks of his caucus' leadership to senate president, he continued to emphasize school finance and reform, going so far one year as to hold the state budget up for eight months to get the level of funding he believed school systems needed. As a native of and later as an elected official representing the poorer neighborhoods of Chelsea, Senator Birmingham experienced first-hand the unequal education delivered to some students and later watched as the school system was put in receivership and handed over to Boston University to manage. He describes these experiences as formative to his commitment to strengthening standards, accountability and school finance.

As House Education Committee chair, Representative Roosevelt kept the attention of the House on education

² These two courses remain the only state-mandated courses for high school graduation.

Outside champions can create pressure for change, apply that pressure to policymakers when the effort is stalled and make sure reforms continue forward despite setbacks or turnover of key elected leaders.

reform, even getting the speaker of the house engaged in blocking annual attempts to undo reform (Roosevelt has remained so committed to education reform that he now is the superintendent of schools in Pittsburgh).

Gubernatorial Leadership

Change-making is easier when you have the governor on your side to use the bully pulpit and his or her political capital to advance reform. At a minimum, reformers will need gubernatorial support and help to exert political capital with legislators to move reform forward. That said, a key lesson is that often the most effective way a governor can improve education policy is by leading and convening, on behalf of, rather than “owning” the agenda, since an agenda too-closely aligned with an individual person may become in jeopardy when a new elected official comes along.

Massachusetts’ governors have been remarkably steadfast in their support of reform. From 1991 through 2006, four different Republican governors sustained MERA, despite increasing and, especially from 1999–2003, sometimes overwhelming political pressure to undermine key tenets of the law, such as charter schools or the high school graduation requirement. Each exerted strong leadership on education and intervened at critical moments in the reform’s trajectory. Governor Weld brought policymakers and educators together to negotiate the law. Governor A. Paul Cellucci reorganized the State Board of Education (BOE) and appointed a new chair when some worried the development of the state’s academic standards were off track.

During the highest levels of political opposition to the reforms, Governor Jane Swift never blinked on the MCAS high school graduation requirement. Governor Romney also kept the momentum going by sustaining the foundation budget for K-12 public education.

Elected in 2006, Democratic Governor Deval Patrick has said education is the top priority of his administration. In

2008, he released a 10-year strategic vision for public education from early learning through postsecondary education under the banner of “The Readiness Project.” Governor Patrick, as with the four governors he succeeded, has thus far resisted calls to undo charter schools or the MCAS graduation requirement, even while calling for a broader vision of assessment and new forms of non-traditional public schools.

Strong Board and Agency Leaders

One of the most important features of education governance in Massachusetts—despite at least three major reorganizations of preK–12 education policymaking since 1993—is the relatively strong authority of the BOE and commissioner of K–12 education overseeing the department of education (DOE). Until 2008, the governor appointed the chair and the members of the BOE to five-year terms and could not replace BOE members until their terms expired. As one newspaper editorialized, “This tended to force board members with different ideas to work together, and the board’s very independence tended to attract talented people willing to serve.”

One typical legislative tension that the MERA balanced well was providing enough detail in the legislation to set forth a framework and guide later decisionmaking, while not putting so much in the law that could micro-manage or impede the decisionmaking about the reform implementation. The Act established, for example, a statewide system of high academic expectations and a comprehensive system of assessments in English language arts, mathematics, science and the social sciences, but left the details to the state board and department of education to manage. As one interviewee commented, “There was enough ambiguity in the final law to let everyone feel their side would win in the end.”

This balancing act might not have worked as well if the right people had not had the right jobs at the right time. The BOE chair after the law was passed, Marty Kaplan, led an inclusive and consensus-focused process to



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identify the “Common Core of Learning” that would serve as the basis of state expectations and assessments. Thousands of educators were engaged over the course of a few years to produce draft documents. The American Federation of Teachers (AFT), in its 1995 landmark report, “Making Standards Matter”, reviewed the quality of each state’s standards, and gave the English and social studies draft standards poor marks (math was not yet ready for review). Only the science content expectations met the AFT’s criteria at that time. Reformers worried that the entire reform would be jeopardized if the standards were not finished quickly and with attention to rigor, clarity and specificity.

In response to these concerns, Governor Weld proposed a massive reorganization of the state board of education—dropping the number of members from 20 to 9—and appointed a new chair, John Silber, president of Boston University during the time that the university managed the Chelsea Public Schools.

Silber’s tenure as chair of the BOE was marked by controversy and he remained chair for only a few years. One of his major accomplishments, however, was moving rapidly to force the DOE to complete the development of the standards as “curriculum frameworks.” In its 1997 and 1998 reports, the AFT praised the new standards and the accompanying assessment guides that had been developed to clarify the content and performances that would be tested on the new MCAS.

Around this time, State Education Commissioner Robert Antonucci, who had led the development of agency-wide plans to implement MERA, decided to retire. The state board of education was split as to whether to hire as commissioner Jim Peyser, who had served as associate commissioner for charter schools in the DOE and now was the education director for the Pioneer Institute, or David Driscoll, who was deputy commissioner under Antonucci and a math educator for more than 30 years in public schools. Simultaneously, Board Chair Silber’s firebrand style of leadership was intensifying. To break the impasse and respond to concerns from the field,

Governor Cellucci stepped in and brokered a deal that led to Jim Peyser taking over as BOE chair and David Driscoll becoming DOE commissioner.

At first, many were skeptical about the notion of Peyser and Driscoll being able to work together after competing for the same job. Instead, the combination of their two leadership styles, their approaches to politics and their credibility with different constituencies proved to be the right formula. The two met monthly and mapped out action plans for board and DOE action. Peyser and Driscoll together oversaw the development of the Massachusetts Comprehensive Assessment System (MCAS) in English language arts, mathematics, science and social studies; the successful implementation of the MCAS high school graduation requirement that first applied to the class of 2003 in language arts and mathematics; the approval of numerous high-performing charter schools (currently, the majority of Massachusetts’ charters outpace similar traditional public schools); and several efforts to strengthen the state’s educator certification and licensure system—all major elements of the MERA.

Urban Superintendents

Several observers noted that the strong and vocal support of urban superintendents, who deftly defended the use of MCAS as a high-stakes graduation test, was pivotal to keeping the requirement in place. Interestingly, while suburban superintendents could feel confident that their students would not have problems passing the minimum-skills assessment, many of them clamored against its use. Urban superintendents, however, whose students were mostly low-income and of color, saw the requirement as a strategy to promote higher expectations and secure additional funding for their schools and students.

Superintendent Thomas Payzant of Boston, for example, hinged his five-year strategic plan’s capacity-building efforts around the state standards and MCAS. The district used the infusion of new state funding and leveraged private funding (such as from the Annenberg Challenge) to strengthen and deepen professional de-

velopment in content, data and use of assessments. He also was a visible and vocal advocate for maintaining the requirement that high school students pass the 10th grade MCAS by the time of graduation.

Other superintendents—such as Karla Baehr, James Caradonio and Basan Nembirkow—similarly championed the reform efforts, even when their local school committees joined the growing opposition movement to the MCAS and exit exam. The urban superintendents’ political courage, coupled with their credibility as educators, has been widely credited with staving off retrenchment from the graduation requirement.

Investing in the reforms over time enables results—and sustainability

Creating new policies will only improve student achievement when the resources are invested to build capacity—of school systems to serve teachers and students, of teachers to be more effective in the classroom, and of students to meet high standards. To many of the leaders who pushed for and designed the MERA, the accompanying resources were just as important as the education reforms.

One of the fundamental components in the 1993 legislation was the state’s commitment to provide greater funding to schools. A new “foundation” funding formula was enacted in statute, which distributed as much as \$350 million in new dollars to poorer districts each year. This formula promoted two principles of school finance: adequacy and equity, by increasing resources to property-poor school districts across the commonwealth. An act of the Legislature is required to override the formula. One result: Massachusetts is one of the few states in the country that spends more on students in poor districts than students in wealthy ones.

In addition, as much as \$100 million in targeted support for MCAS remediation was allocated over a five-year period. These dollars helped school systems provide interventions such as double doses of literacy and math, before- and after-school academic support and teacher-

led extra academic support, and online tutoring for students not meeting the standards.

Though the current economic recession is making it difficult for state budget writers to sustain the heady levels of funding in all their various forms from the 1990s, the “grand bargain” of resources plus reform is cited universally by educators and political and community leaders as a fundamental enabler of the state’s strong education performance and of the reform’s sustainability.

Sticking to the tough reforms even in the face of intense political pressure requires courage and confidence in the quality of the state’s expectations, measures and procedures

Many components of the reform package elicited vociferous opposition from educators and local leaders, particularly as they were rolled out. Accountability was a major sticking point both for students, in the form of a high-stakes graduation test, and for educators, by eliminating tenure—making it easier to replace unqualified teachers—and publicly rating school and district performance. This opposition may have been successful were it not for the strong leadership of individuals throughout the commonwealth and their willingness to make compromises to keep reform moving forward.

Administration of the MCAS began in 1998, with results that were decisively disappointing and even a little frightening. Statewide, 28 percent of 10th graders failed the English test, and 52 percent failed math. In Boston, 57 percent of students failed English and 75 percent failed math. Students in Massachusetts’ towns and cities, like Worcester, fared even worse. Proponents and opponents alike wondered how Massachusetts could move forward in the face of such dismal performance. The story even went national: Reformers across the U.S. viewed the Massachusetts graduation test requirement as a litmus test for a state’s ability to sustain its high expectations in the face of potentially higher-than-palatable failure rates and intense opposition. The controversy



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over the MCAS graduation requirement was so strong that the opinion pages of *The New York Times* weighed in at one point, urging the Massachusetts Board of Education not to back down from high standards.

Indeed, the MCAS was perhaps the most difficult and explosive component of the reform package, prompting many complicated questions. Which tests should students be required to pass? What should be the cutoff score? Who, if anyone, should be exempt? When should it become a graduation requirement? These questions, and many more, dominated the years leading up to 2003, the first year passing the 10th grade MCAS by the end of high school became a graduation requirement.

Opponents stressed that a high-stakes test was unfair, especially to students in low-wealth districts. There was widespread worry that failure rates would be off the charts when the test began to “count” for students, that record numbers of discouraged students would drop out, and that low-income and disadvantaged students would take the worst hit, through no fault of their own. In 2002, a lawsuit was filed on behalf of six students who had not passed the MCAS. The suit claimed that the state had not adequately prepared students and that the tests discriminated against minority students. That same school year, the Massachusetts Teachers’ Association launched an expensive television ad campaign portraying the (untimed) MCAS as a deadline being held over students’ heads.

In an article in the *Washington Post*, then-State Commissioner David Driscoll noted that he was “burned in effigy” during this time and that “marches, protests and weeping were all part of the political conversation” around the MCAS requirement.

Certainly, it would have been easier for Commissioner Driscoll, Board Chair Peyser, Senator Birmingham, Governor Swift and other state leaders to back down under the intense pressure that was applied to delay the testing requirement, but they held firm. Urban superintendents also stood by the reform, though their students arguably had the most to lose. All of these leaders’ tenacity paid off, in large part because they were backed by undeniably high-quality standards and assessments and because they were willing to make necessary compromises to keep the reform moving.

Many observers cite the technical and policy work done by the department of education as a major reason why the graduation requirement survived. If clearer standards and aligned assessments are to truly change instruction in the classroom, they need to be of the highest quality to ensure students are learning what is expected of them and to help teachers be more effective in the classroom.

In 2002, Achieve called Massachusetts’ standards and tests “the strongest and most aligned of the state systems Achieve has studied in depth.” Achieve found the MCAS to be “rigorous, yet reasonable,” a sentiment shared by AFT and The Fordham Foundation, who both continue to give Massachusetts very high marks for their rigorous academic standards.

In addition to the educational and technical value of the standards and tests delivered by the department of education, the board of education made thoughtful, reasonable policy choices around the use of the test for graduation. Compromises were struck that ensured that reforms would keep moving forward. For example, the board decided to require students in the class of 2003 to pass the 10th grade tests in English and math, while delaying the science and history requirements.³

To further relieve the pressure, policymakers agreed to set the passing score required for graduation at 220, the “needs improvement level,” which Commissioner

³ The science MCAS will become a graduation requirement for students in the class of 2010; the Board of Education recently decided that the history MCAS will not count until the class of 2014.

Driscoll has called the “Goldilocks” level. Although proponents originally pushed for a passing score of 240, the “proficiency” level, policymakers decided that, at least initially, 220 placed the bar at “just the right” level. The state put in place focused retakes, which were shorter versions of the test designed specifically to measure whether students could meet the 220 score. Also blunting the edge was an escape valve appeals process that allowed students having difficulty passing the paper-and-pencil test to demonstrate that they had met state standards if they had comparable grades to classmates who had met the MCAS standard.

By the time the class of 2003 neared graduation, the public had had five years in which to adjust to the MCAS, helping to abate some of the opposition. The fact that 93 percent of the class of 2003 passed the MCAS in time for graduation showed that the policy was working (another 2 percent passed the MCAS by the end of summer 2003, bringing the total percentage of students meeting this requirement to 95).

Since then, student performance on the MCAS has steadily increased. The gaps in achievement are narrowing—although more work needs to be done to close the achievement gaps fully between advantaged and disadvantaged students—and Massachusetts students are now on pace with their international peers.

It pays to engage stakeholders early and often

Involving stakeholders in the reform process is one of the most important strategies available to states. While consensus doesn’t necessarily need to be the ultimate goal, all stakeholders should feel heard, valued and included.

In Massachusetts, MBAE set the tone of inclusion from the outset: Everyone was welcome, all ideas were heard, and no one person or agenda was allowed to dominate the conversation. Prior to the reform adoption, Jack Rennie and Paul Reville met with stakeholders from across the state, including teachers’ unions and

other groups that may traditionally have been opposed to large-scale reform. Senator Birmingham noted that MBAE kept open the lines of communication with teachers’ unions at all times, even when their opposition to MCAS was at its peak.

After MERA’s passage, thousands of educators in the field and others were engaged in the development of the Common Core of Learning curriculum frameworks and the MCAS, which not only added transparency to the work but also provided buy-in from teachers and others who might otherwise have objected to the standards.

Ten well-publicized regional open-house forums were held to directly solicit comments, and the state board hosted a two-day televised forum at the State House to hear from distinguished speakers from government, such as Governor Weld, Senator Ted Kennedy and Justice Stephen Breyer; from academia such as Boston University President John Silber, Harvard President Neil Rudenstine, Mt. Holyoke President Elizabeth Kennan, Northeastern President John Curry, Simmons President Jean Dowdall and University of Massachusetts President Michael Hooker; and from business such as the corporate leaders of Fleet Bank, New England Telephone and Jack Rennie of Pacer Systems.

In addition, a 22-minute videotape entitled “Voices of Reform” was developed and distributed along with 50,000 brochures to every school council and school committee in the commonwealth. During the years that the curriculum frameworks were developed, from 1995 to 1998, more than 10,000 educators and other interested parties provided feedback to the state board of education on the draft frameworks.

Transparency in the development and use of standards and assessments is important to build and maintain support

Transparency alone won’t lead to successful reform, but it is part and parcel of any policy change that lasts.



Taking Root



Education Reform in Massachusetts

Transparency leads to better communication and understanding of key issues by stakeholders and can effectively build (or destroy) grassroots support.

Perhaps the most notable aspect of the state's efforts to ensure transparency is the sharing of the test questions and student work. Eighty percent of the questions on the 10th grade MCAS are released each year to educators, parents and students, along with examples of student responses below, at and above the needs improvement level. In fact, the student work examples proved enormously helpful during the height of the anti-MCAS controversy because the samples showed clearly just how *minimal* the skills required to hit the 220 level were.

Next Steps and Challenges for Massachusetts

Certainly, Massachusetts has much of which to be proud. But leaders there will be the first to admit that the work is not done.

Achievement and attainment has leveled

While the state has seen strong results at the high school level, in large part because of the urgency created by the graduation requirement to help students over the bar, scores have been relatively flat for Massachusetts' 4th and 8th graders.

Massachusetts' success in some part masks serious and ongoing achievement issues for low income students and students of color. Overall results on the MCAS continue to rise, yet education achievement and attainment in Massachusetts still correlate too closely with economic status. Massachusetts needs to address this achievement gap to fully meet the promise of MERA.

Opinions and research are mixed as to whether MCAS did or did not increase the high school dropout rate; the DOE estimated that two-thirds of students who dropped out had passed MCAS. Yet there is no doubt that the state's four-year graduation rate is not high enough; statewide, the overall rate hovers around 80 percent, while there are much lower rates for disadvantaged stu-

dents. The achievement gap in basic skills that largely has been erased at the high school level has not carried forward to eliminate the graduation gap.

The state has an unfinished agenda

As other states have taken on the goal of stretching the ceiling as well as the floor by ensuring *all* students graduate ready for college and careers, the commonwealth's progress in this area has been slow. The Board of Education has identified a set of courses that could prepare students, the "Mass Core," but only as a voluntary program that districts can choose to implement. Nor has the state refined the accountability indicators for high schools to provide a fuller picture of high schools beyond 10th grade test scores and the cohort high school graduation rate.

In the last couple of years, the BOE has adopted new policies for educator, school and district accountability. The accountability targets the commonwealth has set for schools and districts remain among the most rigorous in the nation; BOE and DOE leaders have not tried to "game" the system and lower the bar. Prospective elementary mathematics teachers will be required to take a test of their mathematics proficiency to gain certification, the first such requirement of its kind in the nation. Like most states, Massachusetts still needs to take even bolder steps to redesign the entire system for training, hiring, retaining, evaluating and compensating educators.

The BOE has introduced some innovative options to turn low-performing schools into Commonwealth Pilot (or Co-Pilot) schools, based on the acclaimed Boston Public Schools' Pilot School model. Yet, by and large, the state does not have a strategy to turn around failing schools and districts, despite a serious number of schools and districts whose performance has failed to improve year after year.

Controversy continues to rage over whether to expand chartering, even as recent high-quality research has indicated that students in charter schools outperform their peers in traditional public schools and even in the Boston Pilot Schools, as charter school capacity in the state is close to maxing out.

“As someone who has been with this since the very beginning at MBAE, I see us now having a realistic vision of what it will take to close the gaps and deliver on a proficiency standard for all children. Now, we have to commit the resources and execute. Therein lies the challenge, but it’s a very exciting moment.”

— Paul Reville, *Massachusetts Secretary of Education*

The dire economic situation may threaten future progress

Governor Patrick’s year long, statewide, inclusive effort to create a 10-year strategic plan for education via the Readiness Project has provided new goals for P-20 education reform. The goal is for this project’s reports and priorities to become the blueprint for the next chapter of education reform in the commonwealth.

Perhaps for the first time since education reform began in the state, the backers of the Readiness Project describe capacity as both instructional capacity for educators to deliver on standards, and greater capacity and alignment of before-school and out-of-school factors (such as providing universal early childhood education, extending the school day and year, and aligning health and human services with in-school supports). Views on how well the Readiness Project addresses “the unfinished agenda” are mixed. Some advocates are concerned that implementing the plan may distract from tackling the unfinished pieces of MERA or even undermine some of the core components, such as the rigorous standards-based curriculum frameworks, the high-quality MCAS and charter schools.

Even without the differing perspectives on the Readiness Project, in the next few years the fiscal climate may prevent the state from adopting the Readiness Project plan comprehensively. Some observers have estimated that the 50-point plan’s full implementation might require at least \$1 billion in new spending and resources. Exact costs—and benefits—are unknown, though, as some of the recommendations would reduce costs, some would increase costs and many would require more effective uses of existing funds.

However, Governor Patrick’s “Readiness Schools,” which offer some of the autonomy and innovations enjoyed by Pilots and charters, may be a bright spot in the short term as a concrete piece of the Readiness Project agenda that can be enacted even at a time when the state is being forced to make painful cuts in services and spending.

Conclusion

Looking forward, part of what has sustained reform in Massachusetts has been the ingenuity and commitment of local leaders to implementing high standards. Those working on the front lines of education reform don’t accept the notion that progress and improvement are impossible without new funding. Schools and districts are reinventing their approaches and practices to absorb funding cuts, while holding fast to the ideals and delivering on the outcomes required. The current economic situation is, in many ways, a test like no other before it—but it shouldn’t preclude continued forward action.

Secretary Reville recently summed up the promise of the Readiness Project for finishing the unfinished agenda. “As someone who has been with this since the very beginning at MBAE, I see us now having a realistic vision of what it will take to close the gaps and deliver on a proficiency standard for all children. Now, we have to commit the resources and execute. Therein lies the challenge, but it’s a very exciting moment.”

Education Reform in Massachusetts



There are a number of factors that put Massachusetts on the road to success: The commonwealth substantially increased the adequacy of equity of funding to schools; it had inspiring leaders who never gave up and, equally important, knew what to do to achieve lasting reform; and it has a public that understands the challenge and importance of keeping up in a rapidly shifting global economy.

While many things are out of states' control, cultivating the right kind of leadership is one area where reform advocates can have an impact. The qualities that Massachusetts' leaders had in common, whether they were elected officials, DOE staff or external champions, were tenacity, passion, integrity and conviction. They had intellectual courage and stamina, knew how and when to play politics and were able to persevere, even when things got ugly. These leaders were "visionary pragmatists" who kept their eyes on the end goal while working day-to-day on behalf of kids.

In large part, these visionaries have succeeded. Low-income and minority students are doing better than before. More Massachusetts students are going to college. National and international comparisons show that the commonwealth's young people are keeping pace with the trend-setters, and these assessments also verify the rigor and strength of the state's standards and assessments.

While there remains much more work to be done to fully meet the promise of a high-quality education for all students, there are many lessons states may cull from the Massachusetts story as they develop and implement sustainable policies.

Massachusetts Education Reform Act

In the early 1990s, momentum was building across the country for states to step in with a more activist leadership role than they had traditionally played in spurring/demanding school-system improvement and to pursue a more systemic rather than piecemeal approach to school reform, using the idea of higher and clearer standards and better assessments. The recommendations in "Every Child a Winner!" were consistent with this national trend, and the 1993 legislation enacted in Massachusetts was actually more comprehensive than similar standards-based reforms enacted in other states around the same time.

MERA's five primary components:

- Establish new standards and programs for students that ensure high achievement
- Administer a fair and equitable system of school finance
- Work with school districts to create a governance structure that encourages innovation and accountability
- Enhance the quality and accountability of all educational personnel
- Improve the Department of Elementary and Secondary Education's capacity and effectiveness in implementing Education Reform

Final Competency Determination (Percent Passing Both Math and ELA)

	Class of 2003	Class of 2004	Class of 2005	Class of 2006	Class of 2007	Class of 2008*
All	95%	96%	94%	95%	95%	94%
White	96	98	97	97	97	97
Black	88	88	85	86	89	86
Latino	85	85	85	87	89	85
Asian	97	95	95	96	97	95

*These figures may change because complete data on the Class of 2008, including all retake opportunities, are not yet available.

Case Study Interviews

Robert Antonucci—*President, Fitchburg State College (former commissioner, Massachusetts Department of Education)*

Karla Baehr—*Deputy commissioner, Massachusetts Department of Education (former superintendent, Lowell Public Schools)*

Thomas Birmingham—*Senior counsel, Edwards Angell Palmer & Dodge (former president, Massachusetts State Senate; chair, Senate Education Committee)*

Andy Calkins—*Senior vice president, Mass Insight Education & Research Institute*

Bill Guenther—*President and director, Mass Insight Education & Research Institute*

Jennifer Davis—*Co-founder and president, Mass2020*

Henry Dinger—*Partner, Goodwin Procter LLP; board of directors, Massachusetts Business Alliance for Education*

David Driscoll—*Former commissioner, Massachusetts Department of Education*

Arthur Dulong—*Assistant director, Massachusetts Secondary School Administrators' Association*

Dan French—*Executive director, Center for Collaborative Education*

Jamie Gass—*Director, Center for School Reform, Pioneer Institute*

Robert Gaudet—*Senior research analyst, The Rennie Center for Education Research & Policy*

Patricia Haddad—*State representative; co-chair, Joint Committee on Education, Massachusetts House of Representatives*

Linda Hayes—*Assistant director, Massachusetts Secondary School Administrators' Association*

Tim Knowles—*Executive director, Center for Urban School Improvement, University of Chicago (former deputy superintendent, Boston Public Schools)*

Alan Macdonald—*Executive director, Massachusetts Business Roundtable; board of directors, Massachusetts Business Alliance for Education*

Jim McManus—*Principal partner, Slowey McManus; board of directors, Massachusetts Business Alliance for Education (former chief of staff, Senator Robert Antonioni)*

Jeffrey Nellhaus—*Deputy commissioner, Department of Education*

Basan Nembirkow—*Superintendent, Brockton Public Schools (former superintendent, Chicopee Public Schools)*

Peter Nessen—*President, Nessen Associates; board of directors, Massachusetts Business Alliance for Education*

Leslie Nicholson—*Executive director, Stand for Children Massachusetts*

Linda Noonan—*Managing director, Massachusetts Business Alliance for Education*

Michele Norman—*Director of strategic planning and collaboration, Executive Office of Education, Governor Deval Patrick*

Thomas Payzant—*Professor of practice, Harvard School of Education (former superintendent, Boston Public Schools)*

James Peyser—*Partner, New Schools Venture Fund (former director, Pioneer Institute; former chair, state board of education)*

Ann Reale—*Former commissioner, Department of Early Care and Education (former education advisor, Governor Mitt Romney)*

Paul Reville—*Massachusetts secretary of education, Executive Office of Education, Governor Deval Patrick*

Tom Scott—*Executive director, Massachusetts Association of School Superintendents*

Kathy Skinner—*Director, Massachusetts Teachers' Association*

Bob Turner—*Former editorial page writer, Boston Globe*

Anand Vaishnav—*Chief of staff, Boston Public Schools (former education reporter, Boston Globe)*

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