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**TO:** Members of the State Board of Education  
**FROM:** Karen B. Salmon, Ph.D.  
**DATE:** September 19, 2017  
**SUBJECT:** Recommendations of the Master Plan Work Group

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### **Purpose**

The purpose of this agenda item is to provide information regarding the work of the Master Plan Workgroup authorized under Chapter 702 of the Education Article, Annotated Code of Maryland (House Bill 999).

### **Background/Historical Perspective**

The Bridge to Excellence in Public Schools Act of 2002 (Section 5-401 of the Education Article, Annotated Code of Maryland) requires each Local Education Agency (LEA) to develop, adopt, and implement a comprehensive master plan to address student performance. Initial plans were submitted by LEAs on October 1, 2003. Master Plan Annual Updates have been submitted each year to the Maryland State Department of Education (MSDE) for review and approval. The master plan includes a detailed summary of how local board's current year budget and increases in expenditures over the prior year are consistent with goals, objectives, and strategies.

In 2016, the Maryland General Assembly passed House Bill 999 (Chapter 702), *Commission on Innovation and Excellence in Education*, which required the MSDE to convene a group of stakeholders to review the statutory and regulatory requirements of the master plan and new requirements of the federal Every Student Succeeds Act (ESSA). The stakeholder group was specifically tasked with reporting to the State Board of Education, the Commission on Innovation and Excellence in Education, and the General Assembly on recommendations regarding: 1) what information future comprehensive master plans should contain; and 2) whether future comprehensive master plans should be completed in a digital form that can be updated periodically.

### **Executive Summary**

The Master Plan Workgroup was formed in January 2017 and held five meetings between January and August to review existing master plan requirements, local strategic plans, requirements of ESSA, student achievement data timelines, local budget cycles, and to explore possible digital solutions to completing local master plans. Based on this comprehensive review, the Workgroup reached consensus on the following recommendations.

### **What information future comprehensive master plans should include:**

#### **Recommendation 1**

- The Workgroup recommends that the Maryland State Department of Education (MSDE) consider components of future comprehensive master plans to mirror the reporting requirements for the ESSA Local Consolidated Plan, and that the plan should be forward facing to provide a view of the upcoming school year. The recommendation would be in alignment with ESSA's requirement of LEAs to develop a local comprehensive plan, and Section 5-401 of the Education Article, Code Annotated that requires LEAs to develop a comprehensive master

plan. This recommendation eliminates duplication potentially created by the federal and State mandates.

### **Recommendation #2**

- The Workgroup recommends that the MSDE consider future comprehensive master plans to include components of LEAs' strategic plan (e.g., goals, objectives, strategies, timelines, progress monitoring, etc.). This recommendation preserves the strategic nature of the local plan and allows LEAs to maintain local strategic planning structure (e.g. goals, strategies, and timelines). As part of this process, members of the Workgroup reviewed local strategic plans and compared them to the current master plan statute.

### **Recommendation #3**

- The Workgroup recommends that the MSDE consider revising the annual submission date of October 15<sup>th</sup> as stated in Section 5-401(b)(2)(ii) of the Education Article, Annotated Code to a January or February submission date. The recommendation would allow LEAs to develop the master plan for the upcoming year with the most current data. This may also lessen the amount of lag data on which the current-year master plan is based. Graduation and dropout data are examples of data that are released later in the year, typically after the master plan is due.

### **Digital format and periodic updates for future master plans:**

#### **Recommendation #1**

- The Workgroup recommends that the MSDE consider developing a master plan digital reporting portal to be added on the Department's website, as appropriate.
  - a. Provide LEAs with individual access codes to enter data analysis results and reporting requirements based on the data. The digital format portal would allow for data analysis input at multiple times during the year with review at one scheduled time.
  - b. Develop a platform within the portal to provide narrative to include challenges and evidence-based practices, programs or products to ensure student progress. The narrative would be based on data analysis to include goals, objectives, and strategies to promote academic excellence among all students.

#### **Recommendation #2**

- The Workgroup recommends that the MSDE consider a digital reporting portal that will include the ability for LEAs to upload:
  - a. Strategic plans, Title programs and State grant applications, and additional documents to support narrative.

This recommendation would allow LEAs to upload the entire comprehensive master plan into a digital portal that can be periodically updated.

### **Action**

This item is presented for informational purposes only. No action is required.

**Report to the Maryland State Department of Education and the  
Maryland General Assembly  
of the Workgroup on Future Comprehensive Master Plans under  
House Bill 999, the Commission on Innovation and  
Excellence in Education**

**Presented by the  
Maryland State Department of Education**

**September 19, 2017**

**Larry Hogan  
Governor**

**Karen B. Salmon, Ph.D.  
State Superintendent of Schools**



**Karen B. Salmon, Ph.D.**  
State Superintendent of Schools

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## **Acknowledgement**

This 2017 final report of the Maryland State Department of Education Master Plan Workgroup is the result of hard work, valuable input, and commitment from individuals from Local Education Agencies (LEAs) and the Maryland State Department of Education (see the appendix for a full list of the Master Plan Workgroup). Each Workgroup member was exceptionally generous with their time and supportive feedback. Their participation on the Master Plan Workgroup, along with feedback, suggestions, and recommendations were invaluable for the final report. The completion, timeless, and comprehensiveness of this report would not been possible without their active participation and dedication.

## **Executive Summary**

In 2016, Governor Hogan signed House Bill 999 (Chapter 702) into law which established a Workgroup for master plan. Under the provision of Chapter 702, the Workgroup was directed to make recommendations and reporting for future comprehensive master plans. Findings and recommendations of the Workgroup were to be reported to the State Board of Education and the General Assembly by October 1, 2017.

In response to Chapter 702, the Workgroup met four times over the duration of eight months to discuss and develop recommendations for future comprehensive master plans. The meetings were held in the months of January, March, July, and August at the Maryland State Department of Education.

*As a result of the meetings, the following recommendations were made:*

**The Workgroup was tasked to make recommendations on what information should future comprehensive master plans contain.**

### **Recommendation #1**

- The Workgroup recommends that the Maryland State Department of Education (MSDE) consider components of future comprehensive master plans to mirror the reporting requirements for the Every Student Succeed Act (ESSA) Local Consolidated Plan, and that the plan should be forward facing to provide a view of the upcoming school year. The recommendation would be in alignment with ESSA's requirement of LEAs to develop a local comprehensive plan, and Section 5-401 of the Education Article, Code Annotated that requires LEAs to develop a comprehensive master plan. This recommendation eliminates duplication potentially created by the federal and State mandates.

### **Recommendation #2**

- The Workgroup recommends that the MSDE consider future comprehensive master plans to include components of LEAs' strategic plan (e.g., goals, objectives, strategies, timelines, progress monitoring, etc.). This recommendation preserves the strategic nature of the local plan and allows LEAs to maintain local strategic planning

structure (e.g. goals, strategies, and timelines). As part of this process, members of the Workgroup reviewed local strategic plans and compared them the current master plan statute.

### **Recommendation #3**

- The Workgroup recommends that the MSDE consider revising the annual submission date of October 15<sup>th</sup> as stated in Section 5-401(b)(2)(ii) of the Education Article, Annotated Code to a January or February submission date. This recommendation may lessen the amount of lag data on which the current-year master plan is based. Graduation and dropout data are examples of data that are released later in the year, typically after the current master plan is due.

**The Workgroup was tasked to make recommendations on whether future comprehensive master plans should be completed in a digital format that can be updated periodically.**

### **Recommendation #1**

- The Workgroup recommends that the MSDE consider developing a master plan digital reporting portal to be added on the Department’s website.
  - a. Provide LEAs with individual access codes to enter data analysis results and reporting requirements based on the data. The digital format portal would allow for a one-time data input.
  - b. Develop a platform within the portal to provide narrative to include challenges and evidence-based practices, programs or products to ensure student progress. The narrative would be based on data analysis to include goals, objectives, and strategies to promote academic excellence among all students.

### **Recommendation #2**

- The Workgroup recommends that the MSDE consider a digital reporting portal that will include the ability for LEAs to upload:
  - a. Strategic plans, Title programs and State grant applications, and additional documents to support narrative.

This recommendation would allow LEAs to upload the entire comprehensive master plan into a digital portal that can be periodically updated.

# Report from the Maryland State Department of Education Master Plan Workgroup

## Introduction and Background

In 2002, the Maryland General Assembly enacted the *Bridge to Excellence in Public Schools Act*, which restructured Maryland's public school finance system and increased State aid to public schools by an estimated \$1.3 billion over six fiscal years (2003-2008). As a result of this legislation, Maryland adopted a standards-based approach to public school financing.

In 2003, the Bridge to Excellence legislation required LEAs to develop a comprehensive master plan that outlined strategies for improving student achievement and eliminating achievement gaps. Based on the unprecedented increases in State aid and given the unrestricted nature of these funds, the Maryland General Assembly enacted the *Fiscal Accountability and Oversight Act* the following year (2004), which, among other fiscal measures, expanded the scope of the Master Plan Annual Updates to include a detailed summary of how each local board of education's current year budget and increases in expenditures over the prior year were consistent with the goals, objectives, and strategies detailed in the master plan.

On December 8, 2015, the State Board discussed the need to improve the alignment of local budgets with master plan goals and objectives, and the connection of these goals with student achievement and alignment with the ESSA. Subsequently, the MSDE respectfully requested that the General Assembly consider granting the MSDE, and LEAs a one-year waiver from the master plan reporting requirements outlined in Section 5-401(b)(3)(ii) of the Education Article, Annotated Code of Maryland.

The MSDE requested the time to collaborate with LEAs, and other Workgroups to enhance the master plan process and account for the changes in Maryland's education accountability system. At that time, the changes in Maryland's accountability system have been impacted by:

- Maryland adopted new standards: The Maryland College and Career Ready Standards (MCCRS) in 2013-2014
- Maryland implemented new assessments aligned with the MCCRS in 2015
- The Elementary and Secondary Education Act was reauthorized in 2015 with President Obama signing the Every Student Succeeds Act (ESSA)

In response, the Maryland General Assembly passed House Bill (HB) 999, Commission on Innovation and Excellence in Education. The HB 999 charged the State Department of Education to convene a Workgroup to make recommendations for future comprehensive master plans.

In order to accomplish this, the Workgroup was asked to complete the following activities:

1. Review the current statutory and regulatory requirements of the master plan and the new requirements of the federal ESSA.
2. On or before October 1, 2017, make recommendations to the State Board and, in accordance with § 2–1246 of the State Government Article, the General Assembly, regarding:
  - a) What information future comprehensive master plans should include; and
  - b) Whether future comprehensive master plans should be completed in a digital format that can be updated periodically.

In response to Chapter 702, the Workgroup met four times over the duration of eight months to discuss and reach consensus on recommendations for future comprehensive master plans. Meetings occurred on January 13, 2017, March 2, 2017, July 20, 2017, and August 17, 2017.

## **Organization of the Report**

This report provides a response to the Master Plan Workgroup charge as identified in Chapter 702. Each task required by Chapter 702 is presented, along with a summary of the current master plan statute and Workgroup recommendations. Workgroup members were provided with a copy of the master plan current statute and the opportunity to review the draft ESSA State Consolidated Plan in preparation for the each master plan meeting.

Chapter 702 required the Master Plan Workgroup to review the current statutory and regulatory requirements of the master plan and the new requirements of the federal Every Student Succeeds Act, and consider making recommendations for future comprehensive master plans. The following section includes the current master plan statute, and the recommendations of what future master plans should consist and recommendations for whether future comprehensive master plans should be completed in a digital format that can be updated periodically.

## **Summary of Current Master Plan Statute: § 5-401 Education Article, Annotated Code of Maryland**

In the § 5-401 Education Article, Annotated Code of Maryland, it is noted that each local school board shall develop and implement a comprehensive master plan that describes their goals, objectives, and strategies to improve student achievement and meet State performance. The description should include:

- A detailed summary that includes implementation of strategies for meeting goals and objectives;
- Methods for measuring progress towards meeting goals and objectives;
- Timelines for implementation of strategies for meeting goals and objectives;
- Timelines for meeting goals and objectives;

- Description of alignment of budget with goals, objectives, and strategies for improving student achievement; and
- Any other information required by the State Superintendent.

The reporting of the goals and objectives shall include the following students groups:

- Students requiring special education, as defined in § 5-209;
- Student requiring limited English proficiency, as defined in § 5-208
- Prekindergarten students;
- Kindergarten students;
- Gifted and talented students, as defined by § 8-201;
- Students enrolled in career and technology courses;
- Students failing to meet, or failing to make progress towards meeting State performance standards, including any segment of the student population that is, on average, performing at a lower achievement level than the student population as a whole; and
- Any other segment of the student population identified by the State Superintendent.

The current master plan statute includes LEAs to report on strategies to address disparities with regards to students failing to meet, or failing to make progress towards meeting, State performance standards. In addition, each comprehensive master plan should be updated annually and submitted to the Department, on or before October 15<sup>th</sup> for review and approval.

## **Workgroup Recommendations: What Future Master Plans Should Include?**

### **Recommendation #1**

- The Workgroup recommends that the MSDE consider components of future comprehensive master plans to mirror the reporting requirements for the ESSA Local Consolidated Plan, and that the plan should be forward facing to provide a view of the upcoming school year. The recommendation would be in alignment with ESSA's requirement of Local Education Agencies (LEAs) to develop a local comprehensive plan, and Section 5-401 of the Education Article, Code Annotated that requires LEAs to develop a comprehensive master plan. This recommendation eliminates duplication potentially created by the federal and State mandates.

### **Recommendation #2**

- The Workgroup recommends that the MSDE consider future comprehensive master plans to include components of LEAs' strategic plan (e.g., goals, objectives, strategies, timelines, progress monitoring, etc.). This recommendation preserves the strategic nature of the local plan and allows LEAs to maintain local strategic planning structure (e.g. goals, strategies, and timelines). As part of this process, members of the workgroup reviewed local strategic plans and compared them with the local master plans.

### **Recommendation #3**

- The Workgroup recommends that the MSDE consider revising the current annual submission date of October 15<sup>th</sup> as stated in Section 5-401(b)(2)(ii) of the Education Article, Annotated Code to a January or February submission date. The recommended change would allow LEAs to have a complete set of data to develop the master plan for the upcoming year with the most current data. This may also lessen the amount of lag data on which the current-year plan is based. Graduation and dropout data is an example of data that is released later in the year, typically after the master plan is due.

These Workgroup recommendations represent revising the current master plan statute which requires LEAs to report goal, objectives, and strategies for the student groups listed on page 5.

## **Workgroup Recommendations: Whether Future Master Plans should be in Digital Format that can be Periodically Updated**

The Workgroup was tasked to make recommendations on whether future comprehensive master plans should be completed in a digital format that can be updated periodically.

### **Recommendation #1**

- The Workgroup recommends that the MSDE consider developing a master plan digital reporting portal to be added to the Department's website, as appropriate.
  - a. Provide LEAs with individual access codes to enter data analysis results and reporting requirements based on the data. The digital format portal would allow for a one-time data input.
  - b. Develop a platform within the portal to input narrative to include challenges and evidence-based practices, programs, or products to ensure student progress. The narrative would be based on data analysis to include goals, objectives, and strategies to promote academic excellence among all students.

### **Recommendation #2**

- The Workgroup recommends that the MSDE consider a digital reporting portal that will include the ability for LEAs to upload:
  - a. Strategic plans, Title programs and State grant applications, and additional documents to support narrative.

This recommendation would allow LEAs to upload the entire comprehensive master plan into a digital portal that can be periodically updated.

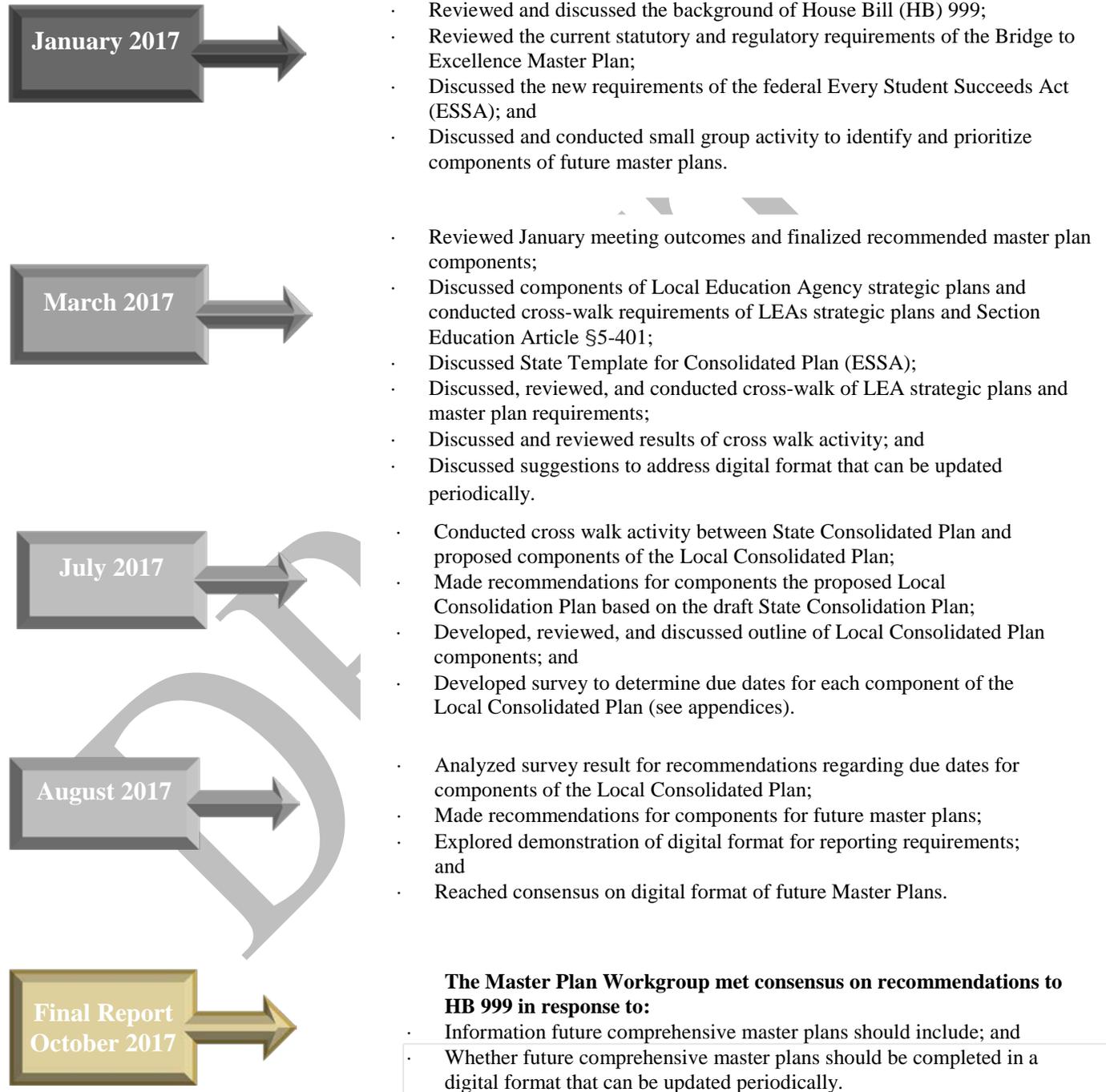
## Outline of Meeting Timeline of Activities

The Master Plan Workgroup meetings were held in January, March, July and August 2017.

Below is an outline of the timeline and activities.

### Meeting Timeline

### Activities



## **Conclusion**

The Master Plan Workgroup recommendations propose an approach to facilitate connection, evaluation, and monitoring of future master plans to improve alignment of local budgets with goals, objectives, strategies, and the connection of these goals to increase student outcomes. The recommendations suggest that a comprehensive approach should be used for the design, implementation, and monitoring of intended provisions using a systematic perspective.

As such, recommendations for the digital format propose reporting, monitoring, and evaluating interventions, products, and programs for use with specific sets of indicators. The recommendations should be implemented consistently by each LEA.

The strategic planning component will afford each LEA to address individual student group challenges and provide opportunities to indicate technical assistance. In addition, each LEA may provide detailed overview on successes regarding accomplishments anchored in annual milestones.

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**APPENDIX**

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## Members of the Workgroup

The Master Plan Workgroup comprised of nineteen members from LEAs and the Maryland State Department of Education (MSDE). In fall 2016, Dr. Karen Salmon, State Superintendent of Schools, forwarded a request to local superintendents to provide staff representation to participate on the Master Plan Workgroup. Twenty-one local staff members represented twelve LEAs on the Workgroup. Nine staff members were from the MSDE. The list of members of the Workgroup is below:

<b>Name</b>	<b>Title</b>	<b>LEA or MSDE</b>
Doreen Bass	Coordinator of Grants	Frederick County
Greg Bricca	Local Accountability Coordinator (LAC)	Carroll County
Russell Brown	Chief Accountability and Performance Management Officer	Baltimore County
Raymond Brown	Chief Finance Officer	Prince George' County
William Burke	Chief Organizational Effectiveness	Baltimore County
Kara Calder	Director, Research and Strategic Planning	Baltimore County
Michelle Daley	Comprehensive Planning Specialist	MSDE
Richard Edwards	Director of Education Services	Cecil County
Bonnie Ennis	Supervisor for School Improvement, Accountability and Strategic	Wicomico County
Nancy Fitzgerald	Executive Director, Special Education and Student Services	Howard County
Mary Gable	Assistant State Superintendent, Division of Academic Policy and Innovation and Division of Student, Family, and School Support	MSDE
Natalie Gay	Coordinator, Data Analysis & Research	Frederick County
Donna Gunning	Program Manager	MSDE
Tracey Hiebel	Secondary Accountability Officer	St. Mary's County
Sheila McEwan	Sr. Manager, Strategic Initiatives	Anne Arundel County
Christine Koth	Director, Office of Research	Baltimore County
Jeffrey Maher	Chief Strategic Officer	St. Mary's County
Leigh Mann	Sr. Manager/LAC, Testing Office	Anne Arundel County
Tina McKnight	Director, Program Improvements for Family Support	MSDE
Kristi Michel	Chief Operating Office, Office of the Deputy Finance Administration	MSDE
James Orr	Administrative Assistant	Caroline County
Karen Peters	Coordinator of Testing	Charles County
Shannon Pugh	Manager, Academics & Strategic Initiatives & Assessments	Anne Arundel County
Walter Sallee	Director, Strategic Planning and Student Services	MSDE
Alice Smith	Coordinator of Research and Planning	Carroll County
Danielle Susskind	Education Policy Specialist	MSDE
Christy Thompson	Executive Director	MSDE
Joan Withers	Acting Director of Secondary Education	Charles County
Judy Walker	Early Learning Branch Chief	MSDE
Renee Villareal	Coordinator of School Improvement and Intervention	Harford County

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# Maryland State Department of Education

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**Recommendations for Future Comprehensive Master Plans  
Workgroup**

**Chapter 720 (HB 999)**

**September 19, 2017**

# Background

- In 2002, the Maryland General Assembly enacted the *Bridge to Excellence in Public Schools Act*
- In 2003, the Bridge to Excellence legislation required LEAs to develop comprehensive master plans
- On December 8, 2015, the State Board discussed the need to improve the alignment of local budgets with master plan goals

# Background (continued)

- **The MSDE requested time to collaborate with LEAs and other Workgroups to enhance the master plan process**
  - **Changes in Maryland's education accountability system contributed to this need:**
    - **Maryland College and Career Ready Standards (MCCRS) adopted in 2013-2014**
    - **New assessments aligned to MCCRS implemented in 2015**
    - **The Every Student Succeeds Act (ESSA) was signed into law, December 2015**

# Introduction: House Bill 999 (Chapter 702)

- **In response, the Maryland General Assembly passed House Bill (HB) 999 (Chapter 702) – Commission on Innovation and Excellence in Education – that required the State Department of Education to convene a group of stakeholders to:**
  - **Review the current statutory and regulatory requirements of the master plan and the new requirements of the federal ESSA.**
  - **Report to the State Board, the Commission, and the General Assembly on or before October 1, 2017.**

# Workgroup Charge

**The Charge of the Workgroup was to make recommendations regarding:**

- What information future master plans should contain; and**
- Whether future comprehensive master plans should be completed in a digital form that can be updated periodically.**

# Workgroup Recommendations

**What information future  
comprehensive master plans  
should contain**

# Recommendation #1

- **Components of future comprehensive master plans should mirror the reporting requirements for the Local ESSA Consolidated Plans. These plans should be:**
  - **Forward facing plans that provide a view of the upcoming school year.**
  - **Aligned with ESSA's requirement of LEAs to develop a local comprehensive plan and requirement for LEAs to develop comprehensive master plans.**
  - **A way to eliminate duplication potentially created by federal and State mandates.**

## Recommendation #2

- **Future Master Plans can include components of LEAs' strategic plans (e.g., goals, objectives, strategies, timelines, progress monitoring, etc.).**
  - **Preservation of the strategic nature of local plans allows LEAs to maintain their local strategic planning structure (e.g. goals, strategies, and timelines).**

# Recommendation #3

- **Consider a revision of the annual submission date of October 15<sup>th</sup> as stated in Section 5-401(b)(2)(ii) of the Education Article, Annotated Code to a late January or February submission date.**

**This timeline revision would allow for a:**

- **Complete set of the most current data to be utilized the development of the master plan.**
- **Decrease in the amount of lag data on which the current-year plan is based.**

# Workgroup Recommendations

**Whether Future Comprehensive Master Plans  
should be completed  
in a Digital Format  
that can be updated periodically**

# Recommendation #1

- **Develop a master plan digital reporting portal to be added to the Department's website, as appropriate.**
  - **Provide LEAs with individual access codes.**
  - **Develop a platform within the portal to input narrative to include challenges and evidence-based practices, programs, or products to ensure student progress.**

## Recommendation #2

- **This digital reporting portal will also allow LEAs to upload local information. Specifically:**
  - **LEAS can upload strategic plans, Title programs and State grant applications, budget information, and additional documents to support the narrative.**
  - **The portal will have upload capabilities for the entire comprehensive master plan that can be periodically updated with one annual review.**