A marriage between education and politics? The marriage of education and politics may not be such an odd pairing when one reflects on the literature regarding the role of schools in society. Meyers and Scott point out that organizations that fall primarily in the public sector must take into account the interests of multiple stakeholders when establishing their goals and procedures. In the case of schools, these stakeholders may include parents, students, business representatives, and other members of the wider community, universities, special interest groups, and, of course, educators themselves.

In the technical realm there are many fewer competing stakeholders and interests to consider.

Leithwood, Jantzi, and Steinbach also write that organizations residing largely in the public sector, as schools do, must negotiate what they will do with many more people. They remind us that forging agreements can be a highly political process involving not only the stakeholders, who consume the services of the organization and provide the financial resources for such services, but also those stakeholders who provide the services. As educators we realize that our changing times demand different leadership and different ways to realize our hopes and dreams for the students we serve. Each year we find that, to be successful in our mission, we need to be more inclusive and adaptable. Since we teach and lead in the public sector, it is crucial that we heed and benefit from the social, economic, and political contexts in which we find ourselves today. Reflecting on these variables, it is clear that the marriage of politics and education has the potential to produce constructive and beneficial gains for our students.

Peter Badalament writes of MASCD’s and ASCD’s commitment to sound education policy development at the state and federal levels with examples of each organization’s mutually supportive efforts to influence learning, teaching, and leadership. In his article, “Small Right Steps: Lobbying for Education Policy,” Peter writes of our responsibility as educators to become involved in the policymaking process for the sake of the children we serve.

“Strengthening Educator Quality at Scale,” by Susan Freedman, focuses on the efforts of educators and legislators working at the state level for the passage of House Bill 4157, a comprehensive long-term educator quality bill. The article defines the vision for statewide policy to govern knowledge-based teacher and leader practice. The passage of House Bill 4157 will result in workforce excellence in teaching and learning for all Massachusetts students and schools. A summary of the bill is included in this newsletter.

If you wonder how locally elected school and town officials and administrators can work together for the greater good of students and communities during difficult fiscal times, read the article entitled “Successful Problem-Solving Through the Marriage of Politics and Education.” The article chronicles the efforts of three distinct legal entities (the Hamilton-Wenham Regional School District and the Towns of Hamilton and Wenham) to develop widespread support for their budgets.
In her article, “The BEST Marriage of Politics and Education,” Isa Kaftal Zimmerman provides us with a historical perspective of how business people and educators working with legislators and other public policy makers advocate for the use of educational technology in Massachusetts schools. The article describes the simple and successful model this state level advocacy group has employed for a decade and a half and continues to use in its lobbying work to enhance teaching and learning in Massachusetts.

The editorial board and I anticipate that you will find this issue of Perspectives, written primarily by members of the MASCD Board of Directors, informative and inspiring. We believe this issue illustrates “healthy” marriages of politics and education. You will find that these examples of collaborative efforts to build consensus and coalitions at the local, state, and national levels have the promise to realize quality educational programming and opportunities for the students and educators of our Commonwealth.


Small Right Steps: Lobbying for Education Policy

by Peter Badalament

My stepfather sent me some cash in a FedEx envelope before I left for Washington, DC, to attend the first meeting of ASCD’s new Legislative Committee. He sent me the money so I could take a mutual friend to dinner, but his gift raised some important questions. Can members of ASCD and MASCD directly lobby legislators and still maintain their nonpartisan status? Presuming it is possible, then how does the lobbying process work and what does it look like? Moreover, in spite of the recent lobbying scandals, what level of influence can we expect to have as constituents if we are not providing campaign contributions?

The Political Power of ASCD and MASCD

I have witnessed how powerful we truly are through my work on the federal level with ASCD and on the state level with MASCD. The ASCD 2006 legislative agenda contains actionable ideas on high stakes testing, high school reform and early childhood education, whereas the work to improve teacher quality in Massachusetts is going through the legislative process in the form of an outstanding education reform House Bill H4157. Over the course of the past two years, both groups have become more involved in the processes that shape educational policies. ASCD, through leadership institutes and, most recently, the creation of a legislative committee, has developed a draft legislative agenda that a top-notch lobbyist will be acting on in the coming months. Members of MASCD’s executive board have been partners in developing and advocating for the passage of H4157, an Act Relative To Teacher And Administrative Quality Throughout the Commonwealth. ASCD members delivered testimony before the Joint Education Committee on Beacon Hill and at other locations around the state on this important bill that will improve teacher quality.

I have played a small role in these efforts, but my part has evolved as the work of both groups has progressed. Several important experiences have shaped my view that our respective organizations are incredibly powerful in their own right and that as individuals there is much we can do that impacts the outcome of legislative processes.

Working as a Team

The importance of taking a team approach to lobbying became clear in the spring of 2004 when I participated in ASCD’s first “Hill Day” with my MASCD colleagues, Elizabeth Keroack, Mary Forte Hayes, Elaine Pace, and Jeff Lord.

As we met with congressmen and senators from the Massachusetts delegation and their legislative staffs, we learned that each member of our group had a unique perspective as well as a talent for drawing attention to ASCD positions. Subsequently, we have maintained our connections with these members of Congress and their advisors through phone calls, e-mails, and letters in an effort to be trusted sources of information when they are making policy decisions.

ASCD made a decision to build on the approach of encouraging educators to lobby legislators, and this past September I was fortunate enough to participate in the LEAP Institute (Leadership for Effective Advocacy and Practice) in Washington, DC with Marinel McGrath, the president of MASCD and Mary Forte Hayes, MASCD’s executive director. We heard several inspirational speakers and participated in training sessions on ways to lobby effectively for ASCD positions such as advocacy for the whole child, for closing of the achievement gap, for responding to high-stakes testing, and for promoting health and learning. We went to Capitol Hill for a second time, prepared for anything from an “elevator walk”
Dan Fuller, ASCD’s Director of Public Policy, and his staff prepared us well; we found that there is power in our non-partisan, non-union affiliation, and when you give a congressional office expert information, they are very receptive. It is important to note that our work on the Hill supports one of our strategic goals: ASCD will be a credible, valued, and clear voice on educational issues.

Creation of the Legislative Committee

The latest step in this process was the creation of ASCD’s legislative committee. Two documents provide further insight into how respected ASCD is and how methodically the 2005 legislative agenda was developed. The itinerary and the process chart shown below are evidence of that precision in planning.
Throughout these discussions, the members of the legislative committee imbued the conversations with the passion grounded in their expertise and experience. Concerns were raised that affiliates and individuals have reservations about ASCD getting involved in the political arena. Judy Seltz, Deputy Executive Director of Constituent Partnerships, reminded us, “We are experts on education.” We have been a powerful force in shaping educational practice for over sixty years. I am very comfortable with the thoughtfulness and deliberation that has gone into the work of launching ASCD’s legislative committee. These are small, ‘right steps’ towards transforming our organizations’ roles in the political realms.

**Legislative Agendas**

As mentioned above, the legislative committee developed ASCD’s first legislative agenda to set the course for ASCD’s influence action with the U.S. Congress and other policymakers during the coming year. The 2006 ASCD legislative agenda identifies its top five legislative priorities:

1. Determine accountability through multiple measures of assessment.
2. Increase support and flexibility for comprehensive professional development.
3. Provide flexibility and resources to support innovative high school reform.
4. Increase support and resources for school readiness and early development of the whole child.
5. Increase flexibility for research-based interventions in schools needing improvement.

MASCD has endorsed the ASCD legislative agenda. MASCD has also been doing similar work on the state level – developing a policy agenda, mobilizing our members to contact their respective representatives and senators at the State House and, unlike the work we have done in Washington, testifying before the Joint Committee on Education. The executive board has been working closely with the Working Group for Educator Excellence to get H4157 passed. The primary result of the passage of this act will be workforce excellence in teaching and leadership for all our schools.

As of the writing of this article, the bill has gained great momentum following a presentation made by the bill’s author Representative Lida Harkins, and educational leaders Jon Saphier, Susan Freedman, and Mary Forte Hayes. I participated as a member of a six-person panel that provided different perspectives ranging from school committees to teachers. My three-minute testimony described the impact this bill would have on principals and building-based leadership. I let the fifteen members and aides from other offices know that there is a crisis paralleling that in the teaching world as the ranks of school leaders are thinning. Moreover, principals need teacher involvement in instructional leadership to support improvement efforts.

Our Changing Role
I once viewed the realm of education policy as a monolith that, as an individual, I could not possibly affect, but my view has changed. Lobbying does not only take the form of large corporate donations or swinging blocks of voters; I have found it is about taking ‘small right steps.’ As importantly, it is about bringing educators’ passion to bear on an issue by providing a network and forums to work with policymakers, sharing our insights and information.

This is a critical time for both organizations to let legislators know what our positions are on key issues. We need to make sure that our members are informed and involved in the process as we break new ground. We can have a significant impact on the political process and still maintain our nonpartisan stance when we advocate for reforms that improve the quality of teaching and learning by providing high-quality information to legislators.

When you visit ASCD’s website (ASCD.org) go to the Action Center link, and click on ASCD Positions where you will see a piece entitled What We Believe. One particular paragraph captures the importance of educator involvement in the policy making process, and provides a powerful justification for active advocacy and lobbying.

Lobbying does not always only take the form of large corporate donations or swinging blocks of voters

Professional educators need to provide leadership in creating the conditions necessary for all children to have access to high-quality education and to find their places in an increasingly complex world. Educators must promote the creation of educational policy that supports best practice, as well as a modern accountability system that uses a variety of methods when making judgments about student achievement and learning. ASCD’s position adoption process is one example of how the Association fosters public and policy support for its beliefs, values, goals and immediate policy concerns.

I said to a friend, “ASCD is like a sleeping giant. We have 175,000 members, we’re non-partisan, and we know what we’re talking about.” He quickly added, “That's a whole lot more than most lobbyists can say, and, besides, you have more real members than several of them added together!” I am proud to be a part of this important effort.

ASCD is like a sleeping giant. We have 175,000 members, we’re non-partisan, and we know what we’re talking about.
SUMMARY of Massachusetts House Bill 4157
An Act Relative to Teacher and Administrator Quality Throughout the Commonwealth

What is House 4157?
House 4157 is the third leg of the stool for education reform: educator quality.

What are the first results we should expect to see from House 4157?
• Better teacher evaluations
• Expedited dismissal of unsuccessful teachers
• Increased retention of new teachers
• Serious re-examination of college and university preparation programs
• Increased opportunity for excellent teachers to take on instructional leadership responsibilities

What are the first two legs of the stool for education reform?
The first is standards and accountability for students; the second is equitable funding for school districts.

Have the first two legs of the stool been addressed?
• The Massachusetts Curriculum Frameworks created rigorous standards for student learning and MCAS established a performance measure by which to gauge student progress in meeting the Frameworks.
• The foundational budget (Chapter 70 formula) made progress toward equitable funding for school districts.

What does House 4157 do?
It provides rigorous consistent standards, adequate supports, and effective accountability for educators.

What are the long-term goals for House 4157?
• Improve student achievement
• Graduate educator candidates who are prepared for proficient teaching
• Retain high-quality veterans and develop novices into skilled, committed professionals
• Strengthen school leadership for student achievement by advancing the role of teachers as instructional leaders
• Provide the process of supervision and evaluation with more substance and rigor
• Integrate the knowledge bases of professional practice into all ten personnel processes influencing educator quality

Why do we need House 4157?
The success of all other educational proposals will be severely restricted without comprehensively addressing educator quality as the frontrunner initiative.

SUMMARY OF THE PROVISIONS IN H 4157

1. Preparation
Provide knowledge-based standards for professional practice and require candidates to demonstrate entry-level proficiency through performance assessments

2. Licensure
Ensure that educators who wish to enter the profession are able to demonstrate entry-level proficiency in the knowledge base for professional practice

3. Recruitment and Hiring
Secure candidates committed to raising achievement, closing the gap, and improving the broad school community and profession

4. Induction
Provide comprehensive, systematic supports to make the transition from pre-service training through the first three years of practice more effective and professionally rewarding

5. Supervision and Evaluation
Maintain high standards of performance while providing frequent, high-quality feedback focused on professional growth

6. Professional Development
Provide systematic access to the map of professional knowledge for educators at all stages in their careers

7. Relicensure
Monitor the profession to ensure that practitioners continually hone their craft and work toward mastery in each domain of the knowledge base

8. Career Advancement
Create a career ladder for exemplary teachers who wish to have responsibility for instructional leadership at the school and district levels

9. School Structure
Expand opportunities for deep levels of interaction and engagement among teachers themselves and among teachers, students, and subject matter

10. Professional Learning Community
Focus on open, honest communication, continuous improvement, data-based decision making, and joint responsibility for student learning

NOTE: School Structure & Professional Learning Community cannot be addressed in legislation. They grow out of the other eight provisions, which rely on policy as a necessary catalyst to strengthen and support them in practice.
Most of us would agree that teaching as an individualized practice has prevailed for too long in our profession. The outcomes — isolated practice, job dissatisfaction, and high turnover — have created an instability that we all know is not in the best interest of students. Despite the many good efforts aimed at strengthening education, the conditions that support individualized practice have created a sizeable roadblock to large-scale improvements in the quality of the educator workforce. And since educator quality is the preeminent variable in student learning, this barrier urgently needs to be addressed.

So the problem my colleagues and I have identified is “How can we ensure teacher and administrator expertise in every school and classroom?” The solution we feel consists of implementing rigorous standards, adequate supports, and effective accountability for the educator workforce. And since educator quality is the preeminent variable in student learning, this barrier urgently needs to be addressed.

Three questions provide a structure by which educator quality can be achieved.

1) What does a comprehensive vision for excellence in knowledge-based teacher and administrator practice look like?

2) What is needed in a statewide policy to support the vision?

3) How can we ensure that the policy will be implemented in the spirit, not just the letter, of the law?

Almost three years ago, my colleague Jon Saphier (the founder and chairman emeritus of Teachers21) and I formed a broad-based coalition called the Working Group for Educator Excellence to explore answers to these questions. This group — which includes key legislators and staff, K-16 practitioners, and members from the business community — has developed House Bill 4157, which is a comprehensive long-term educator quality bill. H 4157 is championed by Assistant House Majority Leader Lida Harkins. MASCD board members who serve in the working group are Peter Badalement, Mary Forte Hayes, Susan Henry, and Isa Zimmerman. In the rest of this article, I will discuss the three questions in relation to the content, roles, and approaches developed and used by the working group.

What does a comprehensive vision for excellence in knowledge-based teacher and administrator practice look like?

The working group focused on articulating a vision for the ten personnel processes that affect educator quality and an implementation design that will maximize influence on the educator workforce. The collaborative process we, the working group, have employed to develop the vision, required members to remove their constituent hats and think solely about what is in the best interest of children.

To develop our vision members had to remove their constituent hats and think solely about what is in the best interest of children.

Lida Harkins. MASCD board members who serve in the working group are Peter Badalement, Mary Forte Hayes, Susan Henry, and Isa Zimmerman. In the rest of this article, I will discuss the three questions in relation to the content, roles, and approaches developed and used by the working group.

Preparation: Providing knowledge-based standards for professional practice and requiring candidates to demonstrate entry-level proficiency through performance assessments.

Licensure: Ensuring that educators who wish to enter the profession are able to demonstrate entry-level proficiency in the knowledge base for professional practice.

Recruitment and Hiring: Securing candidates committed to raising achievement, closing the gap, and improving the broad school community and profession.

Induction: Providing a comprehensive, systematic process to make the transition from pre-service training through the first three years of practice more effective and professionally rewarding.

Supervision and Evaluation: Maintaining high standards of performance while providing frequent, high-quality feedback focused on professional growth.

Professional Development: Providing systematic access to the map of professional knowledge for educators at all stages in their careers.

Relicensure: Monitoring the profession to ensure that practitioners continually hone their craft and work toward mastery in each domain of the knowledge base.

Career Advancement: Creating a career ladder for exemplary teachers who wish to have responsibility for instructional leadership at the school and district levels.
**School Structure: Expanding opportunities for deep levels of interaction and engagement among teachers themselves and among teachers, students, and subject matter**

**Professional Learning Community: Focusing on open, honest communication, continuous improvement, data-based decision making, and joint responsibility for student learning**

The working group created an implementation design intended to bring the vision of H 4157 to scale in the sixth year after its enactment. The design will strengthen the internal capacity in districts through a comprehensive approach that consolidates the human and financial resources influencing educator quality. This design will also develop systemic impact in all the personnel processes while, equally important, preventing them from being pulled apart.

With an at-scale annual implementation cost of $498,829,566, based on a per pupil distribution formula, the working group asked, “What is the most effective way to ensure adequate, predictable, and sustainable money to districts for supporting a strong instructional infrastructure?”

What is needed in a statewide policy to support the vision?

Having developed a large-scale vision for improving educator quality, the group now shifted the question to what will make H 4157 a reality in legislation. The approach we have taken focuses on policymakers and practitioners at the same time.

Without solid legislative support, the comprehensive vision to improve educator quality will remain just that, a vision. Since we feel policy is a critical catalyst for enabling the bill to achieve optimal impact statewide, we have focused on outreach to representatives and senators. But even if the bill were enacted into legislation, we recognize the bill is for practitioners -- we want them to feel empowered by, and committed to, the implementation of this bill as the critical catalyst for strengthening teaching, leadership, and learning for every child. So, creating a groundswell of support to strengthen this commitment, broaden the coalition, and educate the public is unquestionably important.

Having the working group members serve as liaisons to their constituencies is an important strategy we have employed to effectively reach out to policymakers, practitioners, and the public at-large. As liaisons between the working group and their constituencies, the members have supported each other in using strategies such as presenting the bill at executive meetings and conferences, or publishing an article in constituency newsletters. The publication of H 4157 in this issue of Perspectives is an example of the second strategy and is largely supported by the fact that MASCD adopted this bill as part of its platform and has been actively involved with it since 2002.

These efforts have also been helpful in making outreach to the legislature. For example, associations have been encouraged to speak at public hearings through the lens of what H 4157 can mean for them. They have also been encouraged to meet with or send a letter to legislators they can personally touch or who represent the districts/regions in which they live.

Because of this “liaison” strategy, our working group has attained a more inclusive understanding of what the concerns are for each constituency. Our collective understanding of the issues with which practitioners are dealing have enhanced the provisions of the bill. For example, a concern that was expressed repeatedly is the lack of resources to districts. This recurring theme influenced the financial design for the bill. As was mentioned earlier, the $498,829,566 at-scale annual cost now is intended to become additional money earmarked for educator quality in Chapter 70.

How can we ensure the vision will be implemented in the spirit, not just the letter, of the law?

This last question compels us to consider taking a different posture as a profession. We feel that having formal and informal access to a “bully pulpit” is essential if we want to influence large-scale improvements. This access is key to creating powerful mechanisms for strengthening credibility for the bill inside and outside the field and ultimately for influencing knowl.
prehensive plans for districts and professional development schools. Additionally, the panels will approve or disapprove grant applications, and will provide assistance to districts in the implementation of their approved long-term comprehensive plans. The inclusion of this group creates a technical body and political identity that is currently non-existing to ensure a strong voice of practitioners in this legislation.

Conclusion
The marriage between policy and practice is indispensable in improving educator quality statewide. To us, this “marriage” will have far-reaching implications as long as the profession unites as a single body to strengthen the agenda at the policy and practice levels. To that end, our biggest working capital has been the belief by so many that educator quality trumps everything else in student learning. It is this belief that has served as the springboard to building the coalition, shaping the bill, and growing support for its enactment. We believe it will also serve as the foundation for ensuring its effective implementation over time.

Susan Freedman is the President of Teachers21 and the co-Director of the Beginning Teacher Center of Teachers21 and Simmons College. She has been a classroom teacher and is currently an educational consultant, working with districts across the country. She is the former director of the Center for Innovation and manager of the Educator Quality Division of the Massachusetts Department of Education. Susan is the author and co-author of numerous publications and articles on educator quality and school improvement.

Successful Problem-Solving Through the Marriage of Politics and Education

By William F. Bowler, John Clemenzi, Catherine Harrison, Alexa McCloughan, and Marinel D. McGrath

Two years ago a former Hamilton-Wenham Regional School Committee member, Andy Calkins, wrote an article for MASCDS’s quarterly journal Perspectives on how schools reflect their communities. In his article, Andy recalled that former Hamilton-Wenham superintendent, the late Patricia Alger, once told him that “A community’s story is written in the quality of its schools.” Since my appointment as the leader and guardian of the Hamilton-Wenham Regional School District (HWRSD), I have often thought of Superintendent Alger’s statement and the interconnectedness of the school district and its member communities in maintaining the quality of its schools. While the HWRSD, the town of Hamilton, and the town of Wenham are legally separate corporate bodies, they are intertwined through their civic and moral responsibility to educate their youth.

The Problem
In the spring of 2003 the HWRSD, like many districts throughout the Commonwealth, faced a significant challenge when Chapter 70 and local aid funds were significantly reduced. That spring, after too many consecutive years of cost increases, and in the face of too much cutting of state aid, Hamilton-Wenham’s schools, which were as strong as they had been over the years and which had a solid track record of passing Proposition 2 1/2 overrides for capital and operating budgets, failed twice to pass badly needed operating budget overrides. Specifically, the regional school district held two town meetings and override ballots in both towns, one in May 2003 and one in June 2003. The override passed in one town but not the other; therefore, under regional school law, the district did not have a budget to begin the next fiscal year.

As a point of reference, when this situation occurs, Massachusetts General Laws, Chapter 71, Section 16B stipulates that a two-town regional school district must call to order a special district-wide meeting open to all registered voters in both municipalities. In the box that follows is a process overview, developed by the town counsel, to assist communities in dealing with this dilemma.

Under regional school law, the district did not have a budget to begin the next fiscal year.
Overview of Annual Operating Budget Process and Town Meeting Approval for a Two-Town Regional School District

by Donna Brewer MacKenna, Esq. Hamilton (MA) Town Counsel

This reference is provided for the reader who wishes to gain an understanding of the interplay of the responsibilities of the regional school district committee (“RSDC”) and the Town(s) for the adoption, approval and appropriation of the regional school district budget. Most of the procedures set forth herein are required by G.L. c. 71, § 16B.

In a two-town regional school district (RSD), the member towns must unanimously vote to appropriate their apportioned shares. Majority vote of the voters at town meeting suffices for appropriation. A vote to appropriate the apportioned share operates as a vote to approve the entire budget. If the appropriation of the apportioned share does not require an override vote, then nothing further need be done after approval of the appropriation at town meeting. If, however, the appropriation is conditioned upon approval of an override, the ballot vote will determine whether or not the school budget has been approved.

The town meeting vote may be conditioned generally upon the passage of an override vote. If the override vote fails, then either the appropriation has failed or the selectmen may call for another vote on the same question. A city or town may present Proposition 2 1/2 questions to the voters as many times during the year as it chooses. The only constraint on the interval between these elections is the time needed to call and hold each election.” Massachusetts Dept. of Revenue Division of Local Services, “Proposition 2 1/2 Ballot Questions Requirements and Procedures,” p. 4 (February 2002). Here are some examples of the possible outcomes:

1. Town Meeting votes to appropriate $XX, representing its apportioned share.
2. Since the appropriation is not contingent on passage of an override, the school budget is approved.
Or
1. Town Meeting votes to appropriate $XXX representing its apportioned share, contingent upon approval of an override.
2. Override on ballot fails.
3. Selectmen decide whether or not to call another ballot vote on the override or let the vote stand as is.

Since the HWRSD budget failed twice to gain approval by the member towns despite two separate attempts at approval, the HWRSD was then required to call a special district meeting at which those present and voting would determine what the district’s budget would be for the 2003-2004 school year. Some measure of stability was provided when, on that hot August night, an assembly of 2,171 Hamilton and Wenham voters reached a compromise; but there was a cost to that compromise, both for students, whose educational program was eroded, and for the communities and its school district. Their relationship was at a breaking point after multiple town meetings and months of strife among voters and town committees over school budget cuts. The divisiveness in the communities was palpable — People were perceived as being either for or against education. However, even during the most difficult times, I, as superintendent, did not meet or speak to anyone who was against education. All said they wanted strong, quality schools. It was how we were going to achieve the goal of strong, quality schools that caused the difficulties.

The divisiveness of the communities was palpable — People were perceived as being either for or against education.

Sorting Out the Variables

A post mortem was called to review the FY 04 school budget process. Frustration was high, as many perceived that budget considerations between and among town officials, the finance committee, the regional school committee, and school administrators had been held too close to the vest. One school committee member aptly summed up the situation by stating, “The budget process has been a problem for a few years, the school district and the towns have attempted to communicate and work together, but trust, communications, and planning among the groups has not been there.”

School committee members and selectmen, school and town administrators, and finance committee members of both towns knew that we needed to find a way for the different groups to understand how our individual goals impact one another, how to be respectful of each other’s goals, and how to work together to realize what each entity needed financially. So the result of that historic meeting, run by two towns...
and one shared school district, was the realization that in a system where two towns share an independent school district a more complex organization is needed to secure town and school budgets that can be supported by all. The three entities knew that to preserve its schools and its communities, they needed to work together. They needed to develop a structure for budget planning and a communications strategy to educate the communities on the missions and financial needs of the school district and the municipalities. The financial needs are frequently more than can be contributed under the limits of Proposition 2 1/2. It was in this spirit of our individual and collective needs, our intertwined futures, and the much needed healing amongst the constituencies that there was a marriage of education and politics for the HWRSD and the towns of Hamilton and Wenham.

**Developing a Solution**

In September 2003 several entities decided to work together to address the negative economic forces that had buffeted the towns and schools during the past several years. Among those economic factors were reductions in local aid of over 15% during the previous two fiscal years. The members of the Hamilton-Wenham Regional School Committee and its superintendent and school business administrator, the Selectmen and Finance and Advisory Committees for the Towns of Hamilton and Wenham, and their respective town administrators and finance directors embarked upon a number of initiatives designed to address the problem.

Among the initiatives, offered in this article as a model to other communities, was the establishment of two standing committees: (1) a Towns/Regional School District Budget Process Committee (BPC) and (2) a Towns/Regional School District Long Range Financial Planning Committee (LRFPC). Both committees include officials from the towns and schools as well as citizen members from both towns. Everyone hoped that such collaboration would improve the relationships among the three entities and result in a more efficient and transparent planning process and a more cost effective delivery of services.

**The Work of the New Committees**

The Budget Process Committee began with four identified goals:

1. Develop a process and structure for budget planning that is more open and accessible;
2. Improve communication between / among the towns and school district regarding budget development;
3. Improve communication between the towns and schools with respect to shared services;
4. Develop a communications plan to convey town and school budget information to the citizens of the two towns.

We are now in the third year of the unique partnerships embodied in the Budget Process and Long Range Financial Planning Committees. The positive impact of the Budget Process Committee (BPC) has been evident in the outcome of the FY05 and FY 06 budget preparation process. During that time the BPC has recommended and implemented budget process changes as well as developed and implemented a communications strategy aimed at providing citizens with budget forecast and budget development information well before the proposed budgets are presented at the warrant hearings and town meetings in May.

Working simultaneously with the Budget Process Committee, the Long Range Financial Planning Committee identified a number of steps to help bridge the gap between expected revenue and expenses. During the past two years the committee has concentrated on those areas where the towns and school district, working together, can affect cost savings and improvement in delivery of services. The Long Range Financial Planning Committee is now ready to begin discussion of potential long-term budget modification recommendations.

Positive impacts from the first two years of partnership include:

(from the Budget Process Committee...)

**A Budget Process Strategy**

- Developed mutually agreeable budget planning structure and process;
- Established working assumptions to be used by three entities for budget development;
- Established budget process timelines for three entities;
- Developed a “level service” forecast for the current fiscal year budget cycle. A level service budget forecast is the estimated cost required for Hamilton, Wenham and the Regional School District to deliver the same level of services for the upcoming fiscal year as was delivered in the current fiscal year;
- Enacted a review of proposed budgets prior to Warrant Hearings and Town Meetings.

**A Communications Plan**

- Dedicated front page space in the weekly newspaper during the budget season (December - May) to report on BPC activities highlighting the issues and challenges with which it is grappling;
- Joint publication of Connection: Understanding the School District and Municipal Budgets which is mailed to every household in Hamilton and Wenham;
- Joint forums on the school district and municipal budgets which include:

(a) presentation of level service budgets delineating what items account for the majority of spending increases for the towns and the school district and explaining the common assumptions
developed and used by 3 entities for budget development;

(b) forum for citizen feedback, comments, and viewpoints regarding the level services budget forecast; and

(c) review of proposed budgets prior to warrant hearings and town meetings.

(from the Long Range Financial Planning Committee…)

- Development of a long range financial plan, using common assumptions, for the three entities and updated annually;
- Implementation of shared services in technology that includes the sharing of technical staff and where advisable hardware and software systems;
- Implementation of shared building and grounds maintenance;
- Appointment of a capital management subcommittee to research and make a recommendation regarding policy direction on how best to proceed with capital management in the two towns and school district.

After nearly three years, process change recommendations such as these hold great promise and will continue to be discussed by the HW School Committee, the Hamilton and Wenham Boards of Selectmen and their respective Finance Advisory Committees throughout each budget season. The two towns and school district will continue to face significant future financial challenges that we are learning are best addressed through a commitment to structures and processes which have communication and collaboration as their foundation.

How did politics and education improve our marriage?
The following testimonials reflect the views of citizens and stakeholders.

A Citizen's Perspective: Alexa McCloughan

When I was appointed as the Hamilton citizen representative to the Budget Process Committee (BPC) in the fall of 2003, there were two clear goals: to facilitate communications among the towns and schools and to raise awareness within the community of the inner workings of the budget process. Today, as I embark on the third year of my tenure, I am thrilled with how far we have come. By focusing first on community outreach through a series of articles in The Hamilton Wenham Chronicle, we were able quickly to get more information in the hands of the citizens and immediately work to realize the common goal of information sharing both internally within the group and externally. A more ambitious undertaking came in January 2006 when the BPC hosted a community forum to communicate information about the cost of level services in the upcoming fiscal year. Our goal here was to provide voters with a fact base early on in the process so that they could ultimately understand the PY2007 budget when it became public. Engaging the community at this early stage in the budget process had never occurred before but was welcomed. I believe we made an important stride toward demystifying the process. Communities will always have those who will criticize their leaders and their decisions - it is part of a democratic process. But attention to process and communications means that the dialogue can occur with a better fact base and that observers are ultimately better informed.

A Citizen's Perspective: John Clemenzi

Having been actively involved with the HWRSD for over fourteen years as a parent and Wenham community volunteer, I know first hand what an excellent academic program we have available to our children. Our teachers and administrators are committed to excellence.

Nevertheless, I saw a deep divide develop between the taxpayers and the Hamilton Wenham School Committee. The divide appeared to be the result of inadequate communication and validation regarding the ever-increasing cost of education. The taxpayers could no longer cope with a “just trust me” philosophy as they had for many years.

The divide between the school committee and the taxpayer came to a “head” about three years ago, as anxiety levels at town meetings escalated and the opposition from both sides created an impasse. Unlike other town departments (i.e. public works; police; fire) that are under the direct control of the town, the regional school district has the independent legal authority to develop its budget and assess the member towns for its expenses. It is exclusively within the regional school district’s power to determine what items will be funded by the budget and, when appropriations fall short, to determine what will be cut.

As a result of the genesis and development of the Budget Process Committee, a light at the end of the tunnel has appeared. It has taken three years to lower the apprehension on both sides and to understand
what works and what doesn’t work. This has created a level of trust between both sides, thus promoting considerable positive results.

It is my belief that the improved communication level between the school committee and the taxpayers and realization of the financial capabilities of the towns has become the common thread that has carried us through this evolutionary process. I also believe that this will continue to be the guidepost that provides the direction moving forward in a positive light.

A School Committee Member’s Perspective: Catherine Harrison

Like other 11-year veterans of regional school committees, I have worked with a myriad of different people, and experienced more challenging situations than I would even like to count. In that time, there have been three superintendents, new school committee members, new town finance committee members from each of our two member towns, and of course new selectmen and town administrators. We have experienced a major building project (which took three ballot votes to approve), and seven Proposition 2 1/2 overrides—most of them controversial. Through the years, the relationship between towns and schools has been cyclical. At some points, the schools may even have had a good relationship with one town but a difficult time with the other. The following year, the dynamic could switch. In retrospect, these variations seemed to be a function of two major dynamics: (1) the financial climate at the time, and (2) the particular people involved during that period.

The financial crisis of 2003 that Dr. McGrath wrote about certainly was the precipitating factor in the development of the Budget Process and Long Range Planning Committees, but their benefit goes beyond the expected effect of bringing people from all interested groups together in a room to enhance communication. After all, there was a reasonable amount of communication in past years—and sometimes more meetings in the years before these committees were developed than after. I believe that the real difference, and therefore the long-term benefit, is that the towns and school have created a process and structure in which to do our budget planning. This agreed upon structure removed, to a great extent, the effect of individual personalities on the process. Of course, different people with different interests and styles still create both challenges and opportunities for effective decision making but these two standing committees have created a process in which all parties have agreed to function. The goals and operating rules remain unchanged for these groups from year to year. As a result, the process has been institutionalized, taking away the “personality factor” to some degree. This leaves the individuals and groups that participate free to focus on the task at hand, and not to be concerned about who is more powerful, more influential, or more important. Everyone around the table has an equal stake in the process, and the townspeople expect and receive consistent results from year to year.

A Selectman’s Perspective: William F. Bowler

As a selectman in Hamilton, I was all too involved in the budget turbulence that Superintendent McGrath chronicles. In August of 2003, after a months long process which included multiple highly contentious town meetings and ballot votes, the process culminated in an unprecedented district-wide meeting out of which came a budget compromise. I think it is accurate to say that this compromise satisfied no one, and only exhaustion prevented the bitterness and recriminations from being more widespread.

The Superintendent’s Perspective: Marinel D. McGrath, Ed.D.

As a school district, we have had greater opportunities to communicate and discuss our students’ needs, our educational mission, our strategic plan, and the financial requirements needed to preserve program quality and maintain a strong public educational system visible to our town officials, elected boards, and communities. Our work on the BPC brought recognition that the schools need money to preserve program quality. Frequently, more money is needed than can be contributed under the limits of Proposition 2 1/2. In an age of deep voter apathy and disinterest in all things political, I have found that the residents of Hamilton and Wenham care deeply about these issues and will invest time and energy to understand them and to become involved. I believe that the successful passage of the FY ’05 and FY ’06 school budgets and Proposition 2 1/2 overrides were due to the commitment made by the towns and HWRSD through the BPC to develop our budgets with more collaboration. This produced a consensus-driven result. Through the communications strategy, constituents
realize the critical financial issues that affect everyone. The towns and HWRSO need the active participation of the citizens to make an informed decision at town meetings. All of these signals bode well for continuing to refine the process for planning, communicating, and approving the schools’ and towns’ budgets. There will be disagreement, certainly, and passions may run just as high as those in 2003. If all of these signals truly reflect understandings that we can carry with us, then we will be able to refine the process through each budget cycle. The decisions will be made by an informed, involved electorate that is familiar with the dynamics of school and town budgeting and that respects all view-points on the issues. One can’t ask for much more than that.

William F. Bowler is in the first year of his second term as selectman. Prior to his election as a selectman, Mr. Bowler was on the Zoning Board of Appeals for ten years with seven of those years as its chairman. Bill will have lived in Hamilton 20 years this summer and has never missed a town meeting! In his “real” job he is an attorney in private practice.

John Clementi has served in numerous volunteer roles for the town and the school district during his 28 years as a Wenham resident. He is currently a member of the Towns/School Budget Process Committee and the Town Hall Building Committee in Wenham. In addition to running his own company, John has served on the middle school and high school councils, search committees for the high school principal and high school teachers and he chaired the architectural subcommittee for the middle/high school building project. In his “spare” time, John serves as the scout leader for Wenham BSA Troop 28.

Catherine A. Harrison has served on the Hamilton-Wenham Regional School Committee since 1995 where she currently holds the office of Treasurer. She has been chair of the committee twice, and has served as chair of the communications subcommittee and the finance subcommittee. Catherine is presently a homemaker with a professional background as a marketing manager for a medical device company. She received an undergraduate degree in Biology from Purdue University and a Masters Degree in Business Administration from Northeastern University.

Alexa McCloughan is Vice-President of Research Business Development for Gartner, Inc. where she is leading an initiative to adapt Gartner’s product offerings to better meet the needs of the investment community. Prior to this Ms. McCloughan was an equity research analyst at Goldman Sachs covering the storage industry. Being a member of the Towns/School Budget Process Committee is Ms. McCloughan’s first foray into public service where her expertise in communications, marketing, and strategic planning has been welcomed. She received her BA in Business Administration and French from Franklin & Marshall College, Lancaster, PA. She is a chartered financial analyst.

Marinel D. McGrath, Ed.D. is the Superintendent of the Hamilton-Wenham Regional School District and the President of Massachusetts ASCD. Before serving in her current position, she was an elementary, middle, and high school classroom teacher, specialist teacher for the gifted and academically talented, director of curriculum, and assistant superintendent. One of the original developers of the Massachusetts English Language Arts Frameworks, Marinel also teaches graduate courses for aspiring school leaders for Boston University’s principal licensure program. She can be reached at mcgrathm@hwschools.net.

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**Write for Perspectives**

Massachusetts educators are encouraged to contribute to an upcoming issue of MASCD’s *Perspectives*. Authors who wish to contribute should send to the Communications Director Walter McKenzie, (wmckenzie@mascd.org) a brief description of the proposed article.

If your article is accepted for publication, the completed draft will be due by the deadline date listed below.

We encourage authors to submit photographs, charts, and other graphics with their articles.

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**September 2006**

**DESIGNS FOR LEARNING**

1. Does school structure/design determine student destiny?
2. What can high schools adopt from elementary and middle school design?
3. How do the values of educators and communities affect school design?
4. What mental models affect our conceptions about how schools should be designed and run? (Ex: tracking, traditional requirements, sequential courses, physical constraints, etc.)
5. What can we learn from alternative learning designs -- schools without walls, mentorships, charter school structures, non-graded classrooms, looping, schools within schools etc.?
6. What does the current research show about the effectiveness of high schools in America?
7. What is the impact thus far of the Gates Foundation grants?

**Articles due June 1, 2006**

MASCD wishes to thank outgoing Publications Director Elaine Pace for her work on *Perspectives* over the past two years. Walter McKenzie, MASCD’s new Communications Director, will assume responsibilities for *Perspectives* beginning with the September issue.

Share the news... pass this MASCD publication on to a colleague today!!

The mission of the Massachusetts Association for Supervision and Curriculum Development is to promote quality teaching and learning in Massachusetts by fostering instructional and curriculum leadership. The purpose of MASCD *Perspectives* is to share diverse experiences and perspectives of educators across the Commonwealth and to stimulate discussion and further thought on educational topics relevant to this mission. Educators are invited to join MASCD by going to www.MASCD.org.
The BEST Marriage of Politics and Education

by Isa Kaftal Zimmerman

It was the second week of December. Three state representatives, two committee chairs, the minority whip, and several aides met for half an hour with the co-chairs of BEST. We sat in soft chairs in the Members’ Lounge, a space requiring permission to enter, deep in the State House. The legislators were expressing their support for a bill to be heard in January and suggesting to the co-chairs that an expression of grass roots support for the bill be galvanized in order to get traction for legislative approval.

How did two retired K-12 educators, one of whom was doing only pro bono work and the other of whom had gone over to the higher education side, get to the state house for such an uncommon meeting? To answer the question, one can go back to the early 1990’s when a group of people interested in the nexus of technology and education got together to consider how to solve the problem of insufficient Commonwealth support for educational technology. This was a cutting edge activity at the time. While our interests are in the instructional use of technology, because we believe that it is a tool that can change the nature of schooling and the way in which teaching and learning take place, we realized very early in our relationships that the economic impact and the utility of the technology for education reform are essential to emphasize. We cannot keep track of all the data that need to be collected without computers.

Part of the economic effect that became clear is that not enough students are selecting STEM (Science, Technology, Engineering and Mathematics) professions to maintain a competitive economic edge for Massachusetts. So other allies have appeared, including scientific businesses and higher education.

A History of BEST
BEST’s efforts on the Educational Technology Bond Bill from 1994 to 1996 brought $30M to the schools ($30 per student), leveraging approximately $90M more in matching funds and NetDay contributions. BEST was an active participant in the two Massachusetts NetDays that helped to wire the schools in the Commonwealth through a combined effort of all sorts of people—from engineering contractors to parents and every group in between.

BEST also was successful in advocating for $15M for technology training for teachers in 1998. BEST mounted the first lobbying effort by email in the Commonwealth. The fact that this feat has been acknowledged broadly is a coup since it is the perfect marriage of politics and technology. We are very proud of this accomplishment! It is a symbol of our mission.

In 1999-2000, BEST advocated for another $35M in funding for schools through the Capital Needs Investment Trust Fund, which was passed in July 2000, but then was never funded due to the economic downturn. This is an example of how easily the best laid plans can go awry...a great deal of time and energy went into this campaign, and then the promise did not turn into reality. In this work, one learns to accept such disappointments. Another unpredictable phenomenon is the unavailability of legislators after they have scheduled an appointment to meet with us.

The core group of volunteer BEST members meets regularly five or six times a year.

BEST mounted the first lobbying effort by email, the perfect marriage of politics and technology

In between meetings, business is conducted by e-mail and phone. The dozen diehards are people representing the schools such as a superintendent, two technology instructional coordinators, a couple of people from business and industry associations, and several lobbyists who help us figure out strategy but who do not lobby on our behalf since BEST does not employ a lobbyist and does not contribute to political campaigns. Some of the people have been the same since the beginning of BEST. Others shift in and out as their jobs change. BEST activists, as we call ourselves, volunteer to visit legislators and other public policy makers to educate them about initiatives that support our mission, or to testify at public hearings.
**Current Focus**

During the summer of 2005, the co-chairs, occasionally joined by other BEST activists, visited nearly 30 legislative offices to “educate” and get support for the one-to-one computing bill, *H1219, An Act Establishing The Massachusetts Wireless Learning Pilot In The Commonwealth Schools.* This is the most compelling current focus area. While the bill, even with BEST’s proposed amendments, does not entirely match our goal of state-wide implementation, it is the available instrument and thus the focal point of our conversations with legislators. We understand that the final outcome may look very different from what we anticipated.

We learned a long time ago to call early during the morning of our appointment and then to be prepared to learn, when we get to the office, that we cannot meet with the legislator, but rather an aide. We have found that, despite our disappointment about not dealing directly with the legislator, speaking with an aide or two is very productive. Aides take notes, ask questions, and tell us what they will tell their boss. We exchange business cards. We always send thank you letters by ‘snail mail’, despite the fact that we communicate by email.

We actually were in the State House meeting with the senate co-chair of the joint committee on education just as the governor was announcing his plan to provide the MIT designed $100 laptops to all students in Massachusetts. While we appreciate his placing this idea that we support so strongly on the “screen” of the Commonwealth’s voters, we were dismayed that these same voters might expect the cost to be so low, but the Senator assured us that this support would be more helpful than harmful. We quickly wrote an OpEd piece that was published in the *Boston Globe* and tactfully stated our case.

The fact that technology is costly is what makes it so important to marry politics to education. Decisions about technology cannot be left only to local communities. Many decisions must be made at the state level in order to provide equity across the Commonwealth’s schools. On the practical side, state-wide purchases result in economies of scale. And technology is not a one-time event. It is an ongoing investment in hardware, software, human resources, professional development, teacher preparation, and curriculum development that must be maintained and/or replaced regularly.

**What Constitutes Success?**

What elements contribute to BEST’s success in getting itself recognized as the ‘go to’ organization when legislators want to know what is happening with technology in schools? These elements range from record keeping to constant communication. Here is what BEST does:

1. Maintains several databases:
   a. of legislators and their school districts,
   b. of school districts’ technology point people and superintendents;

2. Maintains a constantly updated web site to which people can be referred quickly to get all the basic information they need or want (http://best-edtech.org);

3. Keeps a current list of the members of BEST, since new people join and others become inactive;

4. Creates and maintains talking points and letters appropriate to the group being addressed – this is usually done by one person who then requests responses and suggestions in email;

5. Writes personal letters of thanks when any BEST activists meet with legislators or other policy makers -- a letterhead template lists all our organization members, and beige stationery distinguishes BEST from the usual mail;

6. Serves on committees and presents at conferences: Members of BEST have served on statewide advisory committees ranging from the Special Commission on Educational Technology (2004) which produced a report worth reading and available on the BEST web site, to the Educational Technology Advisory Council to the Commissioner and the
Lessons Learned  
What have we learned and to what do we attribute our sustainability?  
1. Broad based and continuous commitment to the mission is essential.  
   *I have always found that the people who are interested in technology in schools have an enormous amount of passion and persistence, imagination and intuition. They are inspiring to work with.* When we visit the State House, we always try to bring representatives of all our BEST partners.

2. We need a core group of people with a commitment to the benefits of technology in schools for learning and teaching (as well as data collection and record keeping) who are willing to contribute their time for this purpose.

3. We recognize the capacity of technology to keep people connected and in communication.
   *The technology is always changing and that is a challenge to everyone interested in it for schools. Schools cannot afford the latest and greatest all the time so thinking strategically and exchanging experiences and learning are extremely important.*

4. We acknowledge the ability to influence local educators to get their legislators into the schools and to get these educators to join the campaign to engage their legislators in advocating for the importance of technology in schools.
   *Legislators enjoy seeing what is going on with technology and learning so they can make specific and well founded claims about their schools.*

5. We have dedicated leadership to keep the issue in front of all the stakeholders from students to teachers to administrators to policy and decision makers at all levels—local to state wide.
   *The leadership of BEST has always been shared -- at one point by four people, most often by two. Despite the fact that shared leadership can result in gaps and redundancies, BEST’s leaders have avoided that, in part, because of their use of email.*

6. We maintain contact with legislators and their aides.
   *We do not want the decision makers to think we only care about them when we need something and we always tell a legislator which of their colleagues we have been speaking with. We ask their advice and follow it as closely as we possibly can.*

7. We provide accurate and reliable information to the legislators.
   *As one former senator indicated ‘bad data is a show stopper’.* We always aim to provide as complete information as possible and to answer any questions we must research immediately.

The BEST model is not complex and can easily be replicated. What has characterized its success, however, is the steadfastness of the particular people who have been involved for a decade and a half.

And where are we now? As of the writing of this article at the beginning of 2006, H1219, the one-to-one computing bill, was heard at the State House at the end of January. BEST organized the testimony of many different groups of people. Even David Driscoll, the Commissioner of Education, was present, and the two representatives who sponsored the bill testified.

The bill is under consideration as part of the budget before the Joint Ways and Means Committee, and BEST is working with the legislators and sending testimony to negotiate the amount and nature of the funding. We forge ahead with our passion and our commitment to achieving success for the students and educators of the Commonwealth.

Isa Kaftal Zimmerman, Ed. D., is Director of Professional Education at Lesley University. She has been a superintendent of schools, a high school principal, and a middle school teacher. A past president of MASCd, she is co-coordinator of BEST and chair of the Educational Technology Advisory Council to the Commissioner and Board of Education. She is also President of Young Audiences of MA. She can be reached at ikzimmer@lesley.edu.
New Communications Director Named

Walter McKenzie has been appointed Director of Communications for the Massachusetts Association for Supervision and Curriculum Development. The newly created position entails management of MASCD publications, the MASCD website and online communications.

Mr. McKenzie is the author of several books and articles on technology in education. He currently edits *on Cue* for the Massachusetts Computer Using Educators (MassCUE) and has served as a senior editor of manuscripts for the International Society for Technology in Education and as a consulting editor for the journal for the Virginia Society for Technology Education. Mr. McKenzie has extensive experience in web development, management of online communications, developing and implementing web-based distance learning and building online communities of practice.

Mr. McKenzie currently serves as the Director of Technology for the Public Schools of Northborough and Southborough, Massachusetts. He is also Vice-President of MassCUE and the leader of the Massachusetts Technology Directors Special Interest Group. He lives in Amesbury, Massachusetts with his wife Carleen and his children Christopher and Mallory.

MASCD Board of Directors Seeks New Members

WANTED: Enthusiastic, energetic MASCD members to serve on the Board of Directors from September 2006 to June 2009; Anyone interested may apply! In an effort to diversify Board membership, we especially encourage candidates who demonstrate one or more of the following characteristics:

1. are classroom teachers, teacher leaders, or aspiring/new administrators;
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