

Handouts

The Bridge to Excellence Presentation For The Maryland State Board of Education October 28, 2008

Attached is the Transmittal Memo and the White Paper that will be discussed by the State Board of Education.

Please note that because of the size of some documents that they are not reproduced here. The Queen Anne's Master Plan and the 2007 Annual Update as well as other Master Plans and Updates may be obtained by visiting the Bridge to Excellence MSDE Homepage:

http://www.marylandpublicschools.org/MSDE/programs/Bridge_to_Excellence/

We can also advise interested parties to "Visit us on www.marylandpublicschools.org and select Bridge to Excellence from the Programs menu".



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TO: Members of the State Board of Education

FROM: Nancy S. Grasmick, *Nancy* State Superintendent of Schools

DATE: October 28, 2008

SUBJECT: Framework for the Preparation, Review, and Approval of
Local Master Plans and Annual Updates

PURPOSE:

To provide Board members with a foundation for the report on the results of the review of 2008 Annual Updates and how each school system's budget aligns with its Master Plan or Annual Update. That presentation will be at the December meeting of the State Board. At this time Board members are receiving:

- A white paper that overviews the Master Plan, authorizing legislation, and the guidance to local school systems on the Master Plan submission; and
- A copy of the Queen Anne's County Master Plan Update for 2007.

In addition there will be a presentation to the State Board that includes a short video that overviews the development of the Master Plans and a discussion of the Queen Anne's Master Plan Update for 2007 by Dr. Carol Williamson, Superintendent of Queen Anne's County.

BACKGROUND:

The Bridge to Excellence in Public Schools Act (or the shorter Bridge to Excellence or BTE) required each school system to develop a 5-year comprehensive master plan, subject to the approval of the State Superintendent of Schools. State law requires annual updates to the original master plans during the period covered by the Master Plans, a five-year period beginning with the 2003-2004 school year. Senate Bill 907, which amended BTE, requires local boards of education to continue submitting updates to their comprehensive master plans in October 2008 and 2009 and to submit new 5-year comprehensive plans by October 15, 2010. Annual update submissions contain information on progress and challenges related to No Child Left Behind goal areas, additional State requirements, and local goals. Under the BTE, annual update submissions are also subject to the approval of the State Superintendent of Schools.

In 2008, school systems are in the sixth year of Master Plan implementation. In the 2008 Annual Update, school systems are asked to conduct a thorough and detailed analysis of performance relative to No Child Left Behind (NCLB) goals as well as local goals and indicators. In the Updates, school systems are also asked to report the progress being made as well as existing challenges. Further, school systems are required to develop plans for addressing challenges and demonstrating alignment between system priorities and resource allocations.

The Department will complete the review of the 2008 Annual Updates by November 21, 2008. A report will be submitted to the State Board of Education that briefly reveals what was found as a result of the review.

EXECUTIVE SUMMARY:

In 2002, the State of Maryland made a commitment to reform the state of education and ensure equity and adequacy in its public schools. That commitment was enacted as Bridge to Excellence, which resulted in a significant increase in State funding, and gave school systems the flexibility to determine the best allocation of these resources. In exchange, school systems are held accountable for the performance of their schools and their students and must demonstrate that they are making progress each year in improving student performance and closing achievement gaps.

Under the Bridge to Excellence, each school system was mandated to develop, adopt, and implement a 5-year comprehensive master plan, linking funding from federal, State, and local sources, designed to improve student and school performance. The Annual Updates to the Master Plan are intended to provide local school systems, the State Board of Education, the General Assembly, and other members of the public with results of the impact that the BTE legislation is having on school system, school, and student performance, and how those results are being achieved.

To help meet its responsibilities under the law, MSDE established the Bridge to Excellence Workgroup. Each year, in collaboration with the Workgroup, MSDE updates the guidance documents it provides to local school systems on the preparation, review, and approval of local Master Plans and Annual Updates, so that they comply with NCLB and BTE.

MSDE has instituted a formal peer review process for Annual Updates by including review panels, technical reviews, specific written guidance, consensus reports, and recommendations to the State Superintendent regarding approval. Levels of recommendation are: approvable, not yet approvable, and not approved. Plans not yet approvable require further development in the areas identified as incomplete by the review panels; however, the incompleteness would not warrant a complete rewrite or resubmission. Plans recommended as not approved do not meet the criteria and expectations outlined in the guidance document. In order for the criteria and expectations to be met, significant enhancements would be required that may warrant a rewrite and/or resubmission.

Maryland's framework for the preparation, review, and approval of Master Plans and Annual Updates is important for leveraging the changes needed in each local school system to ensure that the Master Plans are having the intended effect of improving student achievement and closing achievement gaps.

ACTION:

For information only.

NSG:kmb

Attachments (2)

Maryland's Framework for the Preparation, Review, and Approval of Local Master Plans and Annual Updates

October 28-29, 2008

**Maryland's Framework for the Preparation, Review, and Approval of
Local Master Plans and Annual Updates
October 28-29, 2008**

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**Maryland's Framework for the
Preparation, Review, and Approval of
Local Master Plans and Annual Updates**

A. Bridge to Excellence Mandate for Local Master Plans and Annual Updates

Over the past six years, the State Department of Education and Maryland's 24 local school systems have directed a great deal of time, effort, and resources toward the Master Plan provision of the Bridge to Excellence in Public Schools Act.¹

This legislation (also known as Bridge to Excellence or BTE) is the most recent effort by State government to provide equitable funding along with the accountability mechanisms and tools to improve student achievement and to close achievement gaps among student subgroups across all Maryland public schools.

BTE is based on the premise that high standards, an increase in State education aid, and specific performance and accountability measures are essential in moving school systems and the State forward.

The Bridge to Excellence Act restructured Maryland's public school finance system, resulting in an increase in State aid to public schools by \$2.2 billion over the past six fiscal years (\$1.3 billion more than required under the previous system), and creating an adequate funding stream that is distributed in an equitable, simplistic manner, and which affords school systems flexibility in allocating the funds.

In exchange for flexibility in spending, local school systems are held accountable for the performance of their schools and their students and must demonstrate that they are

making progress each year in improving student performance and closing achievement gaps.

In 2003, local school systems were mandated under BTE to develop a 5-year Master Plan that outlined strategies for improving student achievement and eliminating achievement gaps. Each year, an update to those plans is submitted and reviewed for sufficiency and to determine if progress is being made by individual school systems and by the State.

Whereas the comprehensive 5-year Master Plan is a blueprint, the Annual Updates rely on the analysis of performance data to adjust the blueprint as necessary to assure that the local school systems are on the right track toward meeting their goals.

A-1. What essential information were local school systems required to include in their master plans?

Answer: The essential information that local school systems had to include in their master plans reflected key program and fiscal requirements in both the Bridge to Excellence in Public Schools Act and the No Child Left Behind Act of 2001.² Specifically, each Master Plan was required to include:

- Goals and objectives that are aligned with State performance standards and local performance standards;
- Implementation strategies for meeting goals and objectives;

¹ Section 5-401, Comprehensive Master Plans, of the Education Article of the Annotated Code of Maryland.

² The Elementary and Secondary Education Act of 1965 (ESEA) reauthorized as the No Child Left Behind Act of 2001 (NCLB). The NCLB Act can be found at <http://www.ed.gov/legislation/ESEA02/>.

- Methods for measuring progress toward meeting goals and objectives;
- Time lines for implementation of the strategies for meeting goals and objectives;
- Time lines for meeting goals and objectives;
- A description of the alignment of the county board's budget with goals, objectives, and strategies for improving student achievement;
- The impact of the proposed goals, objectives, and implementation strategies on public school facilities and capital improvements that may be needed to implement the plan; and
- Any other information required by the State Superintendent.

Based on the authority given the State Department of Education under BTE, the Maryland State Department of Education (MSDE) also required that individual local school systems address the following attributes in each Master Plan:

- An Executive Summary as a stand-alone reference document;
- Federal Elementary and Secondary Education Act (ESEA) programs and related performance goals: attaining reading and mathematics proficiency as well as English proficiency for non-native speakers; ensuring teacher quality; providing safe learning

environments; and ensuring that all students graduate from high school.

- MSDE Cross-program Themes (e.g., Fine Arts; Education That is Multicultural; Gifted and Talented Programs, etc.)
- ESEA Cross-program Themes (e.g., Teacher Capacity and Quality; Educational Technology, etc.)
- Written certifications and assurances.

State law and MSDE called for each Master Plan to include these requirements to address both the general student population as well as eight specifically identified student subgroups (e.g., African American, American Indian/Alaskan Native, Asian/Pacific Islander, Hispanic, White, Free/Reduced Meals, Limited English Proficient, Special Education).

In order to ensure that the myriad of educational programs are integrated, MSDE further required that local school systems submit their titled grant applications along with the master plan submission.

A-2. What performance data were included in the Master Plans?

Answer: Local school systems were required to include in the Master Plan baseline data for each NCLB goal area.

A-3. What help did MSDE have in meeting its responsibilities for developing a framework for the preparation, review, and approval of Master Plans and Annual Updates?

Answer: To help meet MSDE's responsibilities under the BTE Act, the State Superintendent of Schools established the Bridge to Excellence Master Plan Workgroup. The original workgroup, which was comprised of staff from MSDE and experienced educators and representatives of important stakeholder organizations across the state, advised the Department in developing guidance documents for local school systems to use when preparing the Master Plans and the required plan contents, including additional MSDE requirements.

Each year, a workgroup that is similar in composition to the original BTE Master Plan Workgroup is convened to assist MSDE in refining the guidance documents and the review process. In collaboration with this workgroup, MSDE refines the guidance documents to reflect federal and State statutory and regulatory changes.

B. Preparation of Local Master Plans and Annual Updates

The State adopted the Master Plan as a framework for improving academic achievement for all students and subgroups of students and providing transparency in the local school system's use of new resources allocated under BTE.

B-1. How is the Master Plan defined?

Answer: The Master Plan is defined as a local school system plan that describes the goals, objectives, and strategies that would be used to improve student achievement and meet State performance standards and local

performance standards in each segment of the population.³

In developing their plans, local school systems were required to incorporate state, federal, and local funding and initiatives and integrate them into a comprehensive master plan to improve student achievement for all students and to eliminate achievement gaps between subgroups of students.

Under BTE, a local school system could submit its existing integrated management plan or strategic plan as its master plan – if the integrated plan met the requirements outlined in the Bridge to Excellence Act.⁴

B-2. What is the Annual Update requirement?

Answer: BTE required local school systems to submit, on or before October 15, annual updates to their master plans during the period covered by the plans (a 5-year period beginning with the 2003–2004 school year). Senate Bill 907, which amended BTE, requires local boards of education to continue submitting updates to their comprehensive Master Plans in October 2008 and 2009 and to submit new 5-year comprehensive plans by October 15, 2010.

Each year, in response to guidance documents developed by MSDE, local school systems engage in a careful examination of data related to the federal, state, and local goals; changing demographics; and fiscal

³ Maryland State Department of Education. (March 25, 2003). Final Guidance on Developing the Five-Year Comprehensive Master Plan, p. 3.

⁴ Section 5-401 (g), Comprehensive Master Plans, of the Education Article of the Annotated Code of Maryland.

considerations; and then submit their annual updates to MSDE for review and approval.

C. MSDE's Review of Local Master Plans and Annual Updates

Under BTE, the State Superintendent of Schools is required to conduct a review of master plan and annual update submissions for compliance with BTE requirements. Annual Updates are also reviewed to determine if the Master Plan is having the intended effect of improving student achievement, in relation to State performance standards, for all students and subgroups of students during a school year.

As required under Senate Bill 894, the State Superintendent must review annually how each school system's current year approved budget and increases over the prior year are consistent with the Master Plan and any updates to the Plan; and how the board's actual prior year budget and additional expenditures in the prior year's budget are aligned with the Master Plan.

C-1. How did MSDE conduct the review of the Local Master Plans submitted in 2003?

Answer: MSDE instituted a formal peer review process that was intended to ensure that each Master Plan complied with the law and MSDE requirements.

Each review panel was comprised of a combination of MSDE staff, staff from Local School Systems (LSSs), and other experts. In addition, MSDE staff conducted technical and program reviews for specific program areas. The process involved more than 130 persons and thousands of hours.

Peer review panel members used an instrument developed by a subcommittee of the BTE Workgroup to record whether evidence of required information was included in the Master Plan. The panelists then met with a designated facilitator to discuss each member's evaluation. Subsequently, the review panel wrote a consensus evaluation indicating both strengths in the Plan and weaknesses that the local school system needed to address. Clarifying questions were forwarded to local school systems where required evidence was absent from the plan.

A site visit was then conducted to discuss the consensus evaluation and provide the LSS with an opportunity to comment on the findings and establish a timeline for submitting additional information to MSDE to revise the Plan. The panel wrote a final report and made a recommendation to the State Superintendent as to whether the Plan should be approved by the State Board of Education.

C-2. How does MSDE conduct the review of Annual Updates?

Answer: MSDE has instituted a process for the review of Annual Updates. By design, the review process is similar to the master plan peer review process, by including multi-member review panels, technical reviews, specific written review guidance, final consensus reports, and recommendations to the State Superintendent regarding approval. However, it is different from

the master plan review process previously described, by:

- Including guidance review instruments for analyzing performance data and plan content for its sufficiency;
- Eliminating on-site visits; and
- Only requiring a formal review meeting between staff from MSDE for school systems in System Improvement⁵ or those that must provide additional information to clarifying questions.

C-3. What methods are utilized to establish a fair and consistent review?

Answer: MSDE utilizes several methods that are intended to make the review process fair and consistent. To begin, panel rosters are drafted to ensure impartiality, with no reviewer assigned to read a plan submitted by a local school system where there could be a conflict of interest.

Each panel member participates in a training session on the role of the review panelist and the step-by-step procedures that result in a consensus decision on the plan's approvability. The training focus is on the consistent use of the Tools for Reviewers, with specific guidance provided to reviewers on how to use the tools and what to record

⁵ Code of Maryland Regulations 13A.01.04.08.08. The State Board, upon the recommendation of the State Superintendent of Schools or upon its own motion, shall identify for improvement any local school system that for 2 consecutive years fails to make Adequate Yearly Progress.

during their independent review of the Annual Updates.

Panel facilitators play an important role in facilitating the panel review. In the additional training that they receive, panel facilitators become familiar with the Consensus Tool for recording, updating, and transmitting clarifying questions to local school systems. Facilitators also participate in training on working with panel members in reaching consensus, vetting of clarifying questions, and debriefing procedures.

In a recent survey of individuals responsible for preparing Annual Updates and plan reviewers, the results indicate that, overall, MSDE's guidance and communication are effective throughout the Annual Update process.

- 82 of 85 respondents (96%) reported that they were provided clear and comprehensive guidance.
- Of all respondents, 92% reported that communication throughout the Annual Update process was effective in assisting them to successfully fulfill roles.

D. Department of Legislative Services' Performance Audit of Local Master Plans and 2004 Annual Updates

During the fall of 2004, staff from the Office of Legislative Audits in the Department of Legislative Services conducted a performance audit of local Master Plans and 2004 Annual Updates to determine if the plans and updates contained information as required by State law and MSDE.

D-1. Are the Master Plans and Annual Updates compliant with State law?

Answer: Yes. The Performance Audit Report issued in January 2005 revealed that LSSs generally complied with the requirements contained in State law and, as applicable, additional requirements established by MSDE.

D-2. What additional findings were included in the Performance Audit Report?

Answer: The Performance Audit Report also revealed that the master plan update guidance provided by MSDE to LSSs did not adequately address all necessary components. Specifically, the guidance did not require each LSS to submit current status of the NCLB performance indicators.

Another finding of the Performance Audit Report was that LSSs needed additional guidance on how to submit a summary of how the prior year's budget and actual expenditures aligned with goals, objectives, and strategies of the Master Plan, since most updates failed to adequately address this requirement.

E. MSDE and BTE Workgroup Improvement Efforts in the Preparation, Review, and Approval of Annual Updates

Each year, MSDE, in collaboration with the Bridge to Excellence Workgroup, addresses areas of concern relating to the preparation, review, and approval of upcoming annual update submissions. These improvement efforts result in changes to the guidance

documents. The goal of the workgroup is to balance the need for accountability with local school systems' desire to reduce burden.

E-1. What changes were made in the guidance documents as a result of the Performance Audit Report?

Answer: In response to the results of the Performance Audit, MSDE amended the guidance by organizing around the five goals established under NCLB and additional State and local goals. As a result, MSDE and other users of Master Plans and Annual Updates are now able to determine if the local school system is satisfactorily progressing toward State mandated performance targets for each of the NCLB goals.

In response to the Audit Finding that additional guidance was needed related to budgeting, the guidance was improved. More information is explained on this in section E-3.

E-2. Are the guidance documents updated to reflect changes in statute or regulations?

Answer: Yes, the guidance documents are updated annually to reflect changes in statute or regulations.

In 2005, in response to Senate Bill 894, schools systems received revised guidance on illustrating the alignment between identified priorities and their budget.

This required each local school system to submit with the Annual Update a detailed summary of how the school system's current year approved budget and increases in expenditures over the prior year are consistent with the Master Plan. Additionally,

each school system was required to include with the update a summary of how the board's actual prior year budget and additional expenditures in the prior year's budget aligned with the Master Plan.

School systems were also asked to list revenue according to source (local, State, federal, and other) and planned expenditures attributed to the following areas: the five goals of No Child Left Behind, local goals not included in the federal goals, and a mandatory cost of doing business category, which includes increases in negotiated contracts, transportation, nonpublic special education placements, additional positions for enrollment growth, and the costs of opening a new or renovated school.

E-3. Has MSDE changed the guidance documents in response to local school system input?

Answer: Yes. The updated guidance documents respond to survey results from local master planning teams and MSDE staff.

Local school systems wanted the process and the Master Plan and Annual Update documents to be meaningful and helpful for the public.

Therefore, significant revisions were made in 2006 to the Annual Update Guidance Document. The revisions included a set of questions that persisted throughout the document as a follow up to performance data analyses. The set of questions that school systems are required to respond to are as follows:

1. Describe where progress in moving toward the indicators and goal is evident.

In your response, please identify progress in terms of grade levels, subject areas, and subgroups.

2. Identify the practices, programs, or strategies and the related resource allocations that appear related to the progress.
3. Describe where challenges are evident. In your response, please identify challenges in terms of grade levels, subject areas, and subgroups.
4. Describe the changes or adjustments that will be made along with the related resource allocations to ensure progress. Include timelines where appropriate.

Local school systems wanted the data reporting required by the Annual Update to be more efficient.

Due to limited technological and staff capacity, Annual Update documents were not initially pre-populated with data. This meant that local school systems were reporting data that MSDE already had.

While the lack of technological infrastructure and staff capacity remain a challenge, the State Department of Education this year streamlined the Annual Update Guidance Document by incorporating templates pre-populated with data that convey progress toward improving student performance and eliminating achievement gaps.

These templates, which display system-level data demonstrating achievement and achievement gap trends, relate to student

performance on the Maryland School Assessment and the High School Assessments, and other performance indicators, are intended to help the State and local systems assess and adjust plans at the system and school levels. Local school systems are asked to analyze most current data available and to adjust their Master Plans so that the goals of the Local School System are met.

Also, in an effort to make the Annual Update more meaningful and helpful to the public, in 2008, local school systems are asked to address the alignment of priorities and annual budgets in terms of realignment of funds or retargeting resources to meet their current year priorities.

F. Review and Approval Process for the 2008 Annual Update Submissions

Each year, the Maryland State Department of Education conducts the Technical Review of the federal grant and Fine Arts applications in August, and the Content Review of the progress toward State and federal NCLB goals in October of each year. This is completed by the end of November.

F-1. How does MSDE ensure that the Annual Updates are educationally and programmatically sound?

Answer: The Content Review involves an examination of school system analyses of and response to performance data for each of the NCLB Goal areas, additional State reporting requirements, and cross-cutting themes using the set of questions outlined previously.

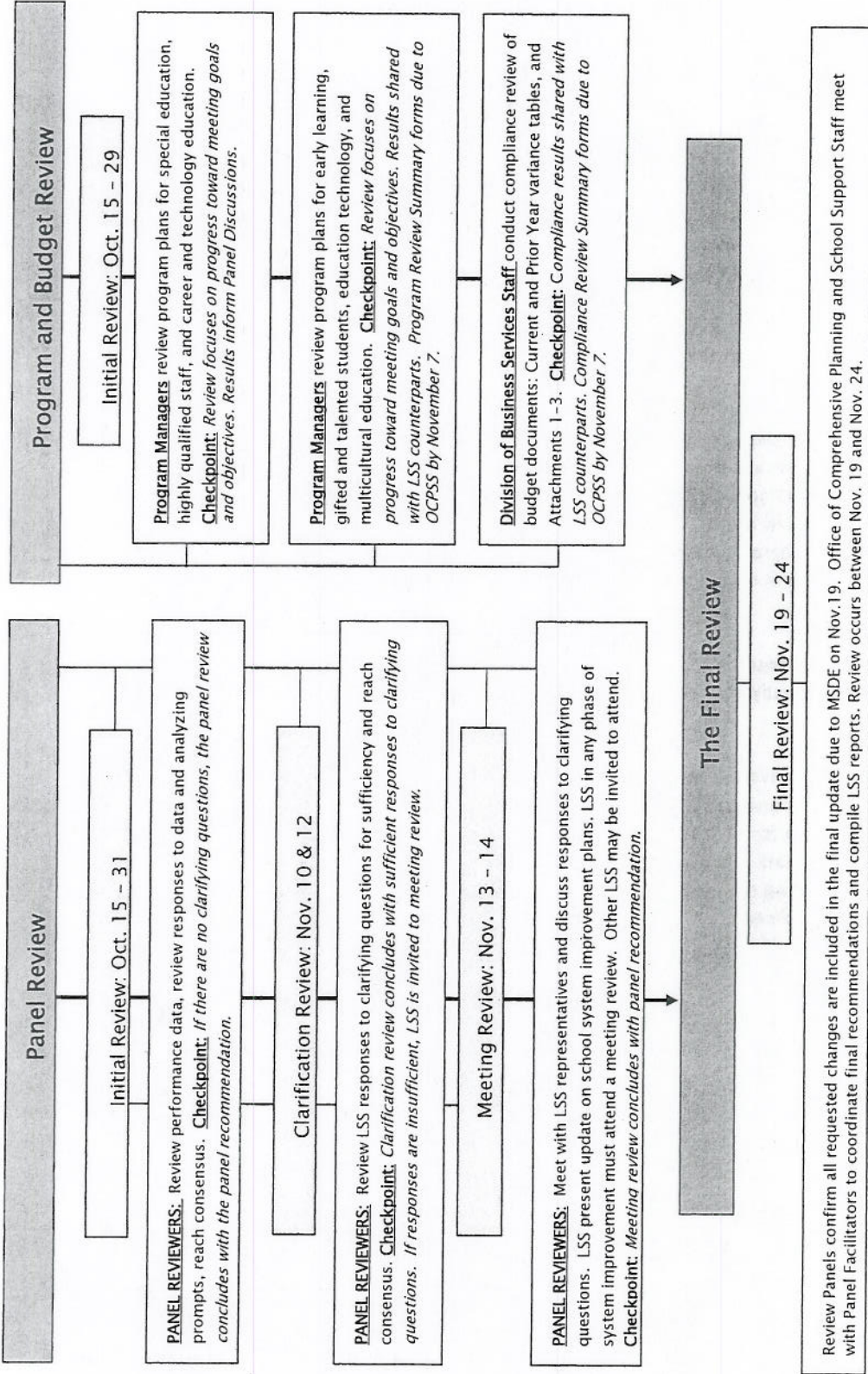
The Content Review, which is shown on page 12, includes a Panel Review, as well as Program Reviews and a Budget Review.

F-2. How does MSDE make sure the Content Review is consistent and impartial?

Answer: MSDE uses a peer review process. In doing so, a community of educators, who are qualified and able to perform an impartial review, are assigned to review panels.

In 2008, a total of 100 review participants are serving on eight panels that evaluate Annual Updates individually (e.g., Initial Review) then discuss them with a group to arrive at a consensus decision. During discussion, panels will identify areas of the Annual Update that need further work, as well as areas of commendable achievement in meeting standards. The panel forwards school systems the commendations and, if necessary, requests for additional information. Local School System personnel then respond to these requests in writing (e.g., Clarification Review).

The Content Review



Personnel from particular school systems may be invited to a face-to-face meeting review (e.g., Meeting Review). This meeting review is a requirement based on the Local School System's status as a School System in Improvement or Corrective Action. Representatives from school systems may also be invited to the Meeting Review to provide additional information on their plans for improving student achievement and closing achievement gaps.

F-3. How does MSDE make sure the reviewers are knowledgeable and experienced about specific program areas?

Answer: Because of their knowledge and experience, MSDE program managers review components of school system Annual Updates related to specific student groups (i.e., early learning, gifted and talented students) and cross-program themes (i.e., multicultural education, educational technology). Program managers work with their counterparts in local school systems in an assessment of the sufficiency of plans toward program goals. In certain cases, the program reviewer (e.g., Special Education, Highly Qualified Staff and Career and Technology Education) provides a report to the panel to inform their discussion.

F-4. How does MSDE conduct the review of the budget documents and alignment?

Answer: Financial specialists conduct a technical compliance review of the Budget Documents (e.g., current and prior year variance tables). While the Panel Review looks at the alignment between Local School System priorities and the budget, this review focuses on the accuracy of the individual

budget documents. Financial specialists work with their local school system counterparts to resolve any compliance issues. A summary report is provided to the Panel Facilitators and the Office of Comprehensive Planning and School Support. The summary report is included in the Final Review.

F-5. How does MSDE make sure the Annual Updates are compliant with State and federal law?

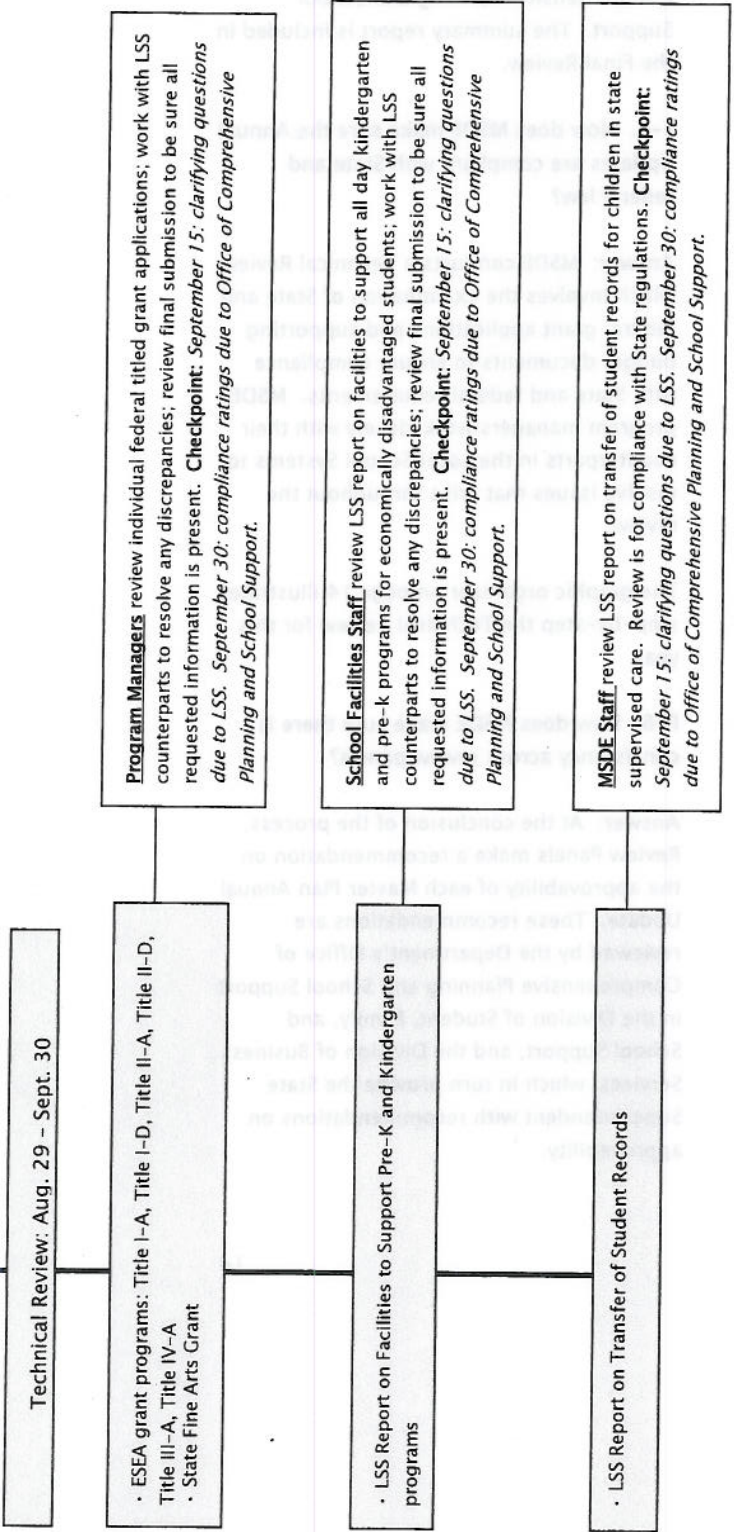
Answer: MSDE conducts a Technical Review, which involves the examination of State and federal grant applications and supporting budget documents to ensure compliance with State and federal requirements. MSDE program managers work closely with their counterparts in the Local School Systems to resolve issues that arise throughout the review.

The graphic organizer on page 14 illustrates step-by-step the Technical Review for this year.

F-6. How does MSDE make sure there is consistency across review panels?

Answer: At the conclusion of the process, Review Panels make a recommendation on the approvability of each Master Plan Annual Update. These recommendations are reviewed by the Department's Office of Comprehensive Planning and School Support in the Division of Student, Family, and School Support, and the Division of Business Services, which in turn provide the State Superintendent with recommendations on approvability.

Technical Review



The State Superintendent's recommendations on the approval status of each Annual Update are reviewed at the December State Board of Education meeting.

G. Approval Process

G-1. As a result of the Final Review, were any Master Plans or Annual Updates not recommended as approvable?

Answer: Initially, not all master plan and annual update submissions were recommended as approvable.

One local school system was required to submit a new Master Plan, and a number of other school systems were required to submit specific revisions to sections of their master plans or annual updates for additional review and later approval.

Under BTE, a county board may not implement a plan or update unless it has been approved by the State Superintendent.⁶

G-2. How are the outcomes of the review process communicated?

Answer: A report that contains the results of the review and how each school system's budget aligns with its master plan or annual update is submitted annually to the State Board of Education, the Governor, and the General Assembly.⁷

⁶ Section 5-401 (f)(3), Comprehensive Master Plans, of the Education Article of the Annotated Code of Maryland.

⁷ Section 5-401 (h)(1) and (2), Comprehensive Master Plans, of the Education Article of the Annotated Code of Maryland.