

*How Is Your  
School District  
Performing?*



*A closer look at*

*Lee  
Public Schools*

2002-2005

EDUCATIONAL MANAGEMENT AUDIT COUNCIL  
*Office of Educational Quality and Accountability*

## **EDUCATIONAL MANAGEMENT AUDIT COUNCIL**

Robert B. Schwartz, Chairman

Maura Banta

Jeffrey P. Howard

Kathleen Madigan

Joseph B. Rappa, Executive Director, Office of Educational Quality and Accountability

## **VISITING PANEL**

Paula Hutton, Coordinating Examiner

Rena G. Shea, Senior Examiner

Andrew Paquette, Examiner/Analyst

William S. Wassel, Associate Examiner

John Burruto, Examiner/Monitor

Cheryl Baker, Associate Examiner

*The five-member Educational Management Audit Council (EMAC) and its agency, the Office of Educational Quality and Accountability (EQA), were established by the Massachusetts Legislature in July 2000 to examine public school districts in the commonwealth. The mission of the EMAC and EQA is to provide independent verification of schools' and districts' efforts to promote higher levels of academic achievement among their students, as measured by the Massachusetts Comprehensive Assessment System test.*

*The Office of Educational Quality and Accountability would like to acknowledge the professional cooperation extended to the audit team by the Massachusetts Department of Education; the superintendent of the Lee Public Schools, Jason Paul McCandless; the school department staff; and the town officials of Lee.*

## CONTENTS

INTRODUCTION .....	2
HOW DID STUDENTS PERFORM?	
Massachusetts Comprehensive Assessment System (MCAS) Test Results .....	3
WHAT FACTORS DRIVE STUDENT PERFORMANCE?	
Overall District Management .....	7
Leadership, Governance and Communication .....	8
Curriculum and Instruction .....	10
Assessment and Program Evaluation .....	12
Human Resource Management and Professional Development .....	14
Access, Participation and Student Academic Support .....	16
Financial and Asset Management Effectiveness and Efficiency .....	18
CONCLUSION .....	20
APPENDIX A:	
EQA's District Examination Process .....	21
APPENDIX B:	
Glossary of Terms Used in EQA Technical Reports .....	23
APPENDIX C:	
State and Local Funding, 1997–2005 .....	24

## INTRODUCTION

Test scores provide one method of assessing student achievement, but a variety of factors affect student performance. The Office of Educational Quality and Accountability (EQA) was created by the state Legislature in July 2000 to examine many of these additional factors by conducting independent audits of schools and districts in Massachusetts. The agency uses these audits to:

- Provide a comprehensive evaluation of each school district's performance;
- Publish annual reports on selected districts' performance;
- Monitor public education performance statewide to inform policy decisions; and
- Provide the public with information that helps the state hold districts and schools, including charter schools, accountable.

In May 2006, the EQA conducted an independent examination of the Lee Public Schools for the period of 2002–2005. This school district was selected for an on-site review. The EQA analyzed Lee students' performance on the Massachusetts Comprehensive Assessment System test and identified areas where students were performing significantly better or worse than the state average. During the on-site visit, the EQA examined critical factors that affected student performance in six major areas: leadership, governance, and communication; curriculum and instruction; assessment and evaluation; human resource management and professional development; access, participation, and student academic support; and financial and asset management effectiveness and efficiency.

The review was based on source documents supplied by the Massachusetts Department of Education and Lee Public Schools; correspondence sent prior to the EQA team's on-site visit; interviews with a representative from the school committee, the district leadership team, and school administrators; and additional documents submitted while the EQA team visited the district. The report does not take into account documents, revised data, or comments that may have been supplied after June 2005. However, district leaders were invited to provide more current information.

## Putting the Data in Perspective

Lee, MA



### DISTRICT

*Population:* 5,985

*Median family income:* \$49,630

*Largest sources of employment:*

Educational, health, and social services, and retail trade

*Local government:* Board of Selectmen/  
Town Administrator/Town Meeting

### SCHOOLS AND STUDENTS

*School committee:* 7 members

*Number of schools:* 2

*Student enrollment:*

Total: 895

White: 88.3 percent

Hispanic: 8.2 percent

African-American: 0.4 percent

Asian-American: 1.5 percent

Native American: 0.7 percent

Limited English Proficiency:  
3.2 percent

Low income: 26.1 percent

Special education: 15.9 percent

*Sources:* 2000 U.S. Census and  
Massachusetts Department of Education.

### EDUCATIONAL MANAGEMENT AUDIT COUNCIL ACTION

After reviewing this report, the Educational Management Audit Council voted to accept its findings at a meeting held on December 1, 2006.

## MCAS Performance at a Glance, 2005

	DISTRICT	STATE
<i>Average Proficiency Index</i>	75	78
<i>English Language Arts Proficiency Index</i>	84	83
<i>Math Proficiency Index</i>	66	72

### Performance Rating



The Proficiency Index is another way to look at MCAS scores. It is a weighted average of student performance that shows whether students have attained or are making progress toward proficiency, which means they have met the state's standards. A score of 100 indicates that all students are proficient.

## HOW DID STUDENTS PERFORM?

### Massachusetts Comprehensive Assessment System (MCAS) Test Results

Students in grades 3–8 and Grade 10 are required to take the MCAS tests each year in one or more specified subject areas, including English language arts (ELA), math, and science and technology/engineering (STE). Beginning with the class of 2003, students must pass the Grade 10 math and ELA tests to graduate. Those who do not pass on the first try may retake the tests several more times.

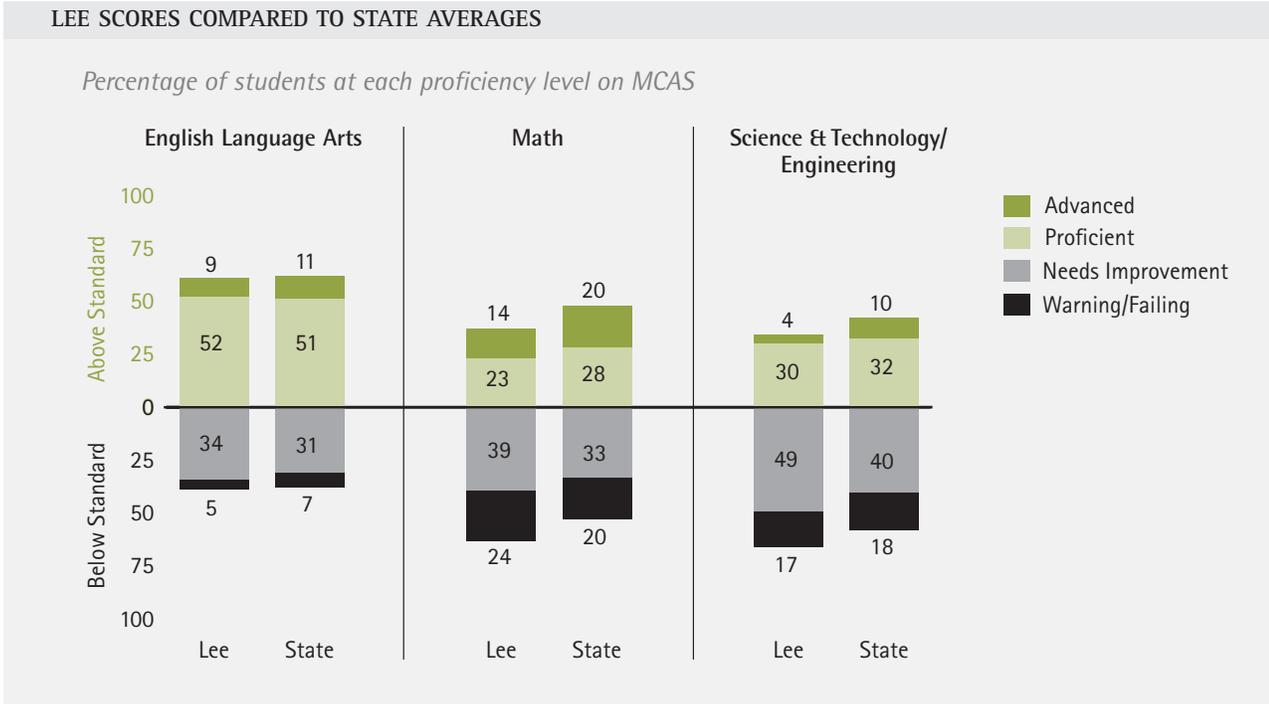
The EQA analyzed current state and district MCAS results to determine how well district students as a whole and sub-groups of students performed compared to students throughout the commonwealth. The EQA analysis sought to answer the following five questions:

#### *1. Are all eligible students participating in all required programs and assessments?*

On the 2005 MCAS tests in English language arts (ELA), math, and science and technology/engineering (STE), eligible students in the Lee Public Schools participated at levels that exceeded the state requirement of 95 percent, with rates ranging from 98 to 100 percent.

#### *2. Are the district's students reaching proficiency levels on the MCAS examination?*

On average, roughly half of all students in Lee attained proficiency on the 2004 and 2005 MCAS tests. This proportion was slightly lower than that of the state on the MCAS tests for both years. In 2005, approximately three-fifths of Lee students attained proficiency in ELA, and more than one-third of Lee students attained proficiency in math and in STE.

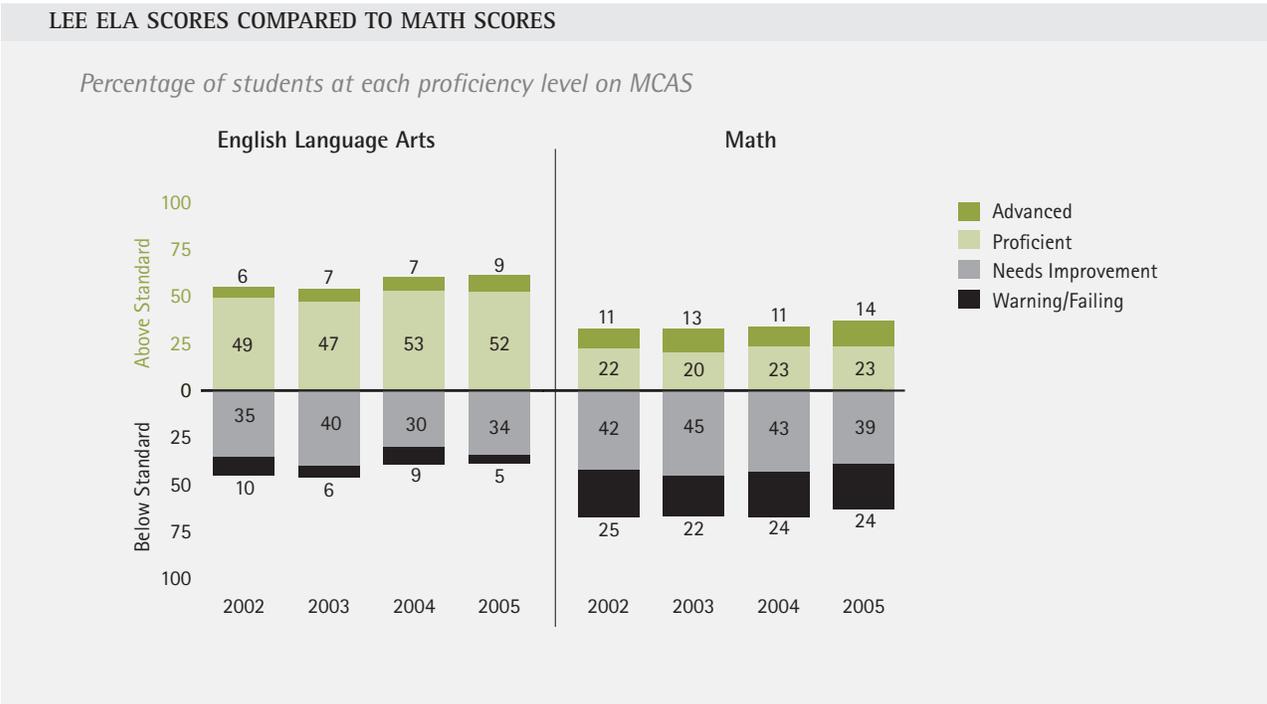


- In 2005, Lee's proficiency gap in ELA was 16 Proficiency Index points (PI), slightly narrower than the state's average proficiency gap in ELA. This gap would require an average improvement in performance of more than one and a half PI points annually to achieve adequate yearly progress (AYP).
- Lee's proficiency gap in math was 34 PI points in 2005, and in STE it was 33 PI points. Both these gaps were wider than the state's average proficiency gap for these content areas, and would require an average improvement of more than three and a half PI points per year to achieve AYP.

**3. Has the district's MCAS test performance improved over time?**

Between 2002 and 2005, Lee's MCAS performance showed slight improvement overall and in ELA, and little improvement in math.

- The number of students scoring in the 'Advanced' and 'Proficient' categories rose by six percentage points between 2002 and 2005, while the number of students in the 'Warning/Failing' category decreased by four percentage points.
- Over the three-year period 2002-2005, Lee showed slight improvement in ELA performance, improving by almost two PI points per year for this period. This resulted in a closing of the proficiency gap of nearly 24 percent, a rate lower than that required to meet AYP.
- Math performance in Lee showed less improvement during this period, improving by less



than one PI point annually. This resulted in a closing of the proficiency gap of almost six percent, also a rate lower than that required to meet AYP.

**4. Do MCAS test results vary among subgroups of students?**

MCAS performance in 2005 varied among subgroups of Lee students. Of the six measurable subgroups in Lee, the gap in performance between the highest- and lowest-performing subgroups was 18 PI points in ELA and 26 PI points in math (regular education students, students with disabilities, respectively).

- In Lee, the proficiency gaps in 2005 in both ELA and math were wider than the district average for students with disabilities, Hispanic students, and students participating in free or reduced-cost lunch programs. Less than one-quarter of students with disabilities attained proficiency, more than one-quarter of Hispanic students attained proficiency, and close to half of students in free or reduced cost lunch programs did so.
- The proficiency gaps in 2005 in both ELA and math were narrower than the district average for regular education students, White students, and students not participating in free or reduced-cost lunch programs. For both subgroups, more than half the students attained proficiency.

LEE STUDENTS' IMPROVEMENT OVER TIME, COMPARED TO STATE AVERAGES



- The proficiency levels of Hispanic students and students participating in free or reduced-cost lunch programs were higher than the state average for these subgroups.

5. Has the MCAS test performance of the district's student subgroups improved over time?

All subgroups of students showed improvement in ELA between 2003 and 2005. The following subgroups showed improvement in math during this period: regular education students, White students, Hispanic students, and students participating in free or reduced-cost lunch programs. The largest gains in both ELA and math were made by students participating in free or reduced-cost lunch programs.

Performance at a Glance

Management Quality Index

The Management Quality Index is a weighted average of the district's performance on 64 indicators that measure the effectiveness of a district's management system. Lee received the following rating:

Performance Rating



WHAT FACTORS DRIVE STUDENT PERFORMANCE?

Overall District Management

To better understand the factors affecting student scores on MCAS, the EQA analyzes district performance on 64 indicators in six areas: leadership, governance and communication; curriculum and instruction; assessment and program evaluation; human resource management and professional development; access, participation and student academic support; and financial and asset management effectiveness and efficiency. Taken together, these factors are a measure of the

effectiveness – or quality – of a district's management system. A score of 100 percent on the Management Quality Index (MQI) means that the district meets the standard and performed at a satisfactory level on all indicators. However, it does not mean the district was perfect.

In 2005, Lee received an overall MQI score of Poor (50 percent). The district earned its highest rating, 'Strong,' in the area of access, participation, and student academic support, and its lowest rating, 'Improvable,' in curriculum and instruction. Given these ratings, the district is performing slightly better than expected on MCAS tests. Those scores have remained relatively flat, and subgroup gaps remain, but have narrowed, for the most part. On the following pages, we take a closer look at district performance in each of the six areas.

A CLOSER LOOK AT MANAGEMENT QUALITY

Lee, 2002–2005



## Leadership, Governance and Communication

Ultimately, the success or failure of district leadership was determined by how well all students performed. Lee Public Schools was among the 'Moderate' performing school districts in the Commonwealth, with MCAS test scores that were 'High' in ELA and 'Low' in math.

## Governance and Planning

During the period under review, a great deal of turnover occurred in the leadership of the school district. The current superintendent assumed the position in 2005-2006, after serving as the middle/high school principal for three years under the former superintendent. During 2001-2002, two part-time, interim superintendents had served the district. From 2002-2005, the same superintendent served for three years and left the district at the end of the 2004-2005 school year. In addition, there were the two new principals at the elementary and middle/high schools, a new assistant principal at the middle/high school, and the position of special education director changed.

While the Tyringham School Committee's membership remained the same, the composition of the Lee School Committee changed. Four members stepped down for various reasons. The current arrangement between the two districts of Supervisory Union #29 called for equal decision-making with regard to issues surrounding the superintendent, even though Tyringham supplied only eight percent of the district's student population.

The district did not have a standards-based District Improvement Plan (DIP), complete with measurable goals, action plans, and timelines. When the former superintendent was asked about this, she told the EQA team that since

### Performance at a Glance

#### Ratings on Performance Indicators

In this area, districts are rated on 12 indicators. Lee received the following ratings:



#### Areas of Strength

- The school committee approved and advocated for budgets with town officials and community members.

#### Areas for Improvement

- Only eight percent of the district's student population was from Tyringham, yet that town possessed 50 percent of the vote on hiring, firing, and the evaluation of the superintendent.
- A District Improvement Plan (DIP) was not in place during the review period. As a result, the SIPs were not aligned to district initiatives.
- The district did not monitor student achievement data on a regular basis during the period under review.
- The evaluations of principals and other district administrators were not completed at any time during the period under review, with the exception of one timely and informative evaluation of the middle/high school principal who was to become the superintendent.

Lee had only two schools, she felt that the district did not need a separate DIP. The district provided evidence of a No Child Left Behind (NCLB) plan, but according to the superintendent, it was not used as the DIP. Under the direction of the present superintendent and administrative team, efforts were underway to develop a DIP to guide the district beginning in the 2006-2007 school year.

According to interviewees, the district had School Improvement Plans (SIPs), which were approved by the school committee, for each school, for each of the years under review. According to interviewees, the status of goals from the previous year was discussed during a regularly scheduled school committee meeting, prior to the acceptance of the upcoming SIP. Each school council developed a SIP, but the goals contained within each plan did not address student achievement, the use of data, timelines associated with action plans, or the persons accountable for accomplishing the goals.

## Leadership

The school committee evaluated the previous superintendent on two occasions during her three-year tenure with the district. The instrument used by the committee addressed relationships with the board, staff, community, and personnel, as well as assessed skills in the area of educational leadership, business and finance administration and finally personal qualities. The instrument did not include the Principles of Effective Administrative Leadership (PEAL). It did include summative statements. In 2005-2006, the chairperson of the school committee stated that he did conduct a mid-year evaluation of the current superintendent.

The district files provided no evidence of a sustained evaluation process for all members of the administrative team. When asked about this, the former superintendent told the EQA team that she had thoroughly evaluated the former elementary school principal in two subsequent years, before he left to take a position in another community. She did not know why these documents were not available during the onsite visit, but suggested that perhaps in the move of the administrative office out of the schools, some things had been misplaced. During the years under review, the EQA team found that the middle/high school principal had been evaluated in his third year and that the evaluation was informative, instructive, timely, and signed by both parties.

The new superintendent had not yet evaluated members of the current administrative team, but he indicated that it was his intention to complete evaluations during the summer of 2006. The school committee policy manual had not been updated on a regular basis, and the committee stated that Massachusetts Association of School Committees (MASC) had been hired to assist with the update during the 2006-2007 school year.

## Curriculum and Instruction

The Lee Public Schools faced many challenges in the area of effective curriculum development and instructional practices – essential elements of efforts to improve student performance.

### Aligned Curricula

The school district lacked a complete, written curriculum in all subject areas including components such as the material taught, a pacing chart, formative assessments, benchmarks, common summative assessments, resources to be used, and activities for differentiating instruction for remedial and advanced learners.

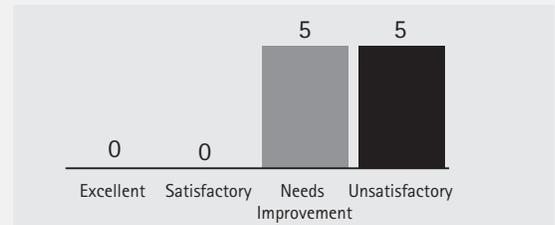
At the time of the onsite visit, the district was in the preliminary stages of writing a comprehensive curriculum in all subject areas, including ELA and math. For three years, at the secondary level, teachers had been mapping course content, in preparation for a New England Association of Schools and Colleges (NEASC) visit. Previously, the district relied on the scope and sequence of each subject area's textbook, chosen because of its perceived or advertised alignment with the state curriculum frameworks.

At the elementary level, mapping was begun in 2005-2006. Previously, teachers at the elementary school relied on textbook series and had much autonomy with respect to instruction in each subject area and in each classroom. Despite the fact that the textbook series in ELA and math were new, were advertised as aligned with the state frameworks, and teachers were trained in their use, the elementary school was failing to make AYP in ELA or mathematics. Therefore, the teachers began mapping the curriculum in preparation for writing a complete and aligned curriculum for grades PK-6 that is aligned with the state curriculum frameworks, consistent from teacher to teacher, and vertically aligned from grades K-12.

## Performance at a Glance

### Ratings on Performance Indicators

In this area, districts are rated on 10 performance indicators. Lee received the following ratings:



### Areas of Strength

- During the period under review, the district analyzed the curriculum for trends and patterns and did item analysis in some key areas.

### Areas for Improvement

- At most grades, the district lacked both horizontal and vertical alignment of the curriculum that was taught.
- The district did not have complete, written curricula in all core subject areas that were aligned with the state curriculum frameworks.
- Summative evaluations of teachers were not carried out in the district; the former superintendent had not held principals accountable for formally supervising teachers.
- The former superintendent confirmed that the community and teachers had low expectations for students. Teachers' unwillingness to change instruction and low student achievement results on the MCAS tests, especially at the elementary level, provided evidence of this.

## Effective Instruction

The EQA team conducted classroom observations in order to view instructional strategies encompassing areas that were assessed by the MCAS tests. Examiners were asked to focus on the areas of classroom management, instructional practice, expectations, student activity and behavior, and educational climate.

Positive classroom management was observed in 77 percent of the possible instances from grades 2-12 and in 71 of possible instances percent at the elementary school, 80 percent of possible instances at the middle school level, and 78 percent of possible instances at the high school level. Positive instances of instructional practice were observed in 58.5 percent of possible opportunities in the district overall, and in 53.5 percent of possible opportunities at the elementary, 81.5 percent of possible opportunities at the middle school level, and 63.8 percent of possible opportunities at the high school level. High expectations were noted in 44.6 percent of the total instances in the district overall, with 41 percent observed at the elementary school, 66.6 percent observed at the middle school level, and 46.8 percent observed at the high school level. Examiners observed evidence of positive student activity and behavior in 52.9 percent of the possible instances, with 54.2 percent at the elementary school, 41.6 percent at the middle school level, and 56.2 percent at the high school level. During the classroom observations by the EQA examiners in grades 2-12, positive climate was observed in 58 percent of the possible instances, with 45.4 percent observed at the elementary school, 77.7 percent at the middle school level, and 75 percent at the high school level.

Across the district, teachers, principals, other administrators, and union representatives provided little clarity about the process of teacher evaluations as written in the contract. An examination of the files of non-professional status teachers in the sample drawn revealed that the teachers were not observed and/or evaluated by principals and administrators, according to the contract. The EQA team found many instances of teachers attaining professional status without having been observed or without receiving a summative evaluation in one to three of each of the three previous years.

According to the elementary and middle/high school principals, the schools did not adjust instructional time in ELA and math based on the analysis of MCAS data. The elementary school continued to spend 60 minutes on mathematics instruction and a minimum of 60 minutes on ELA instruction.

The current superintendent stated that prior to his administration, most district administrators and teachers did not realize that Lee had not made AYP in math.

## Assessment and Program Evaluation

Student assessment data include a wealth of information for district and school leaders on strengths and weaknesses in the local system, which provides valuable input on where they should target their efforts to improve achievement.

### Student Assessment

The district's assessment programs and practices were not systematic or coherent. The use of the MCAS results was severely limited, highly generalized, and did not penetrate the school culture. District leadership did not engage personnel at all levels in the regular practice of disaggregating the MCAS results for the purpose of formative modification of either curriculum or instructional practices. Individuals and groups who were motivated to take advantage of achievement data did so, but within narrow purviews and without district coordination.

The district did not systematically use local assessment tools. In grades K-4 the district compiled lists of discrete skills and content knowledge to be learned in reading, math, science, and social studies. However, the lists did not indicate how they could be used to measure mastery at each grade level and in each subject area. In interviews, teachers and administrators stated that local benchmarks did not exist, with the exception of those used in Reading Recovery, which were used for less than one-third of the students in Grade 1 and even fewer students in Grade 2. In focus groups, teachers told the EQA team that student achievement data were not distributed on a timely or regular basis to teachers.

The elementary school used the DIBELS in 2005 and 2006 but not in a systematic or programmatic way, according to teachers. The elementary school had purchased the formative assessment computer program, Yearly Progress

## Performance at a Glance

### Ratings on Performance Indicators

In this area, districts are rated on 8 performance indicators. Lee received the following ratings:



### Areas of Strength

- The district ensured that all students participated in the MCAS tests.

### Areas for Improvement

- The district did not make effective use of the results of the MCAS tests and other assessment instruments and programs for the purpose of improving student performance.
- During the review period, the district did not adequately inform parents and other community members about the weaknesses of its educational programs as revealed by assessment results.
- Evaluations of instructional programs, of professional personnel performance, and of support services were consistently inadequate and detracted from the district's ability to modify curriculum and instruction to improve student achievement.
- The district did not effectively use student assessment results and other performance data to assign or reassign staff, set goals and priorities, or allocate instructional time and resources.

Program (YPP), during the period under review but teachers and administrators stated that training for and supervision of the use of YPP had not occurred. The elementary school also offered the computer assessment program AIMSWeb during the period under review but teachers stated in interviews that few of them used the program. School officials and teachers told the EQA team that the district primarily measured student progress with either teacher-generated exams or textbook versions of content tests and final exams at the middle and high school levels.

### Program Evaluation

The district did not make effective use of internal audits or assessments to inform its program decisions. External audits were conducted during the period under review by NEASC, the DOE's Coordinated Program Review, and the National Association for the Education of Young Children (NAEYC). In response to the NAEYC external audit of early education programs, the district's curriculum was adjusted and communication with parents improved.

During interviews, teachers and officials stated that the middle and high school level course curriculum mapping provided some structure against which to evaluate programs. However, the absence of fully articulated curriculum documents restricted systematic program evaluation for evidence of effectiveness. At the elementary school the absence of both curriculum maps and fully articulated curriculum documents prevented data-based evaluation of programs, vertical and horizontal curriculum consistency, or integration. Classroom observations at the elementary school revealed that the same content topics were used at different grade levels.

Officials stated that leadership instability due to administrative turnover before and during the period under review contributed to the absence of effective program evaluation for the purpose of modification or discontinuation of programs. School year 2005-2006 was the first in many years that the district employed a regularly appointed and permanent director of special education. However, informal review of school district and student needs in the first year of the period under review led to the adoption of a student support/student discipline program at the elementary and middle school levels. Further informal evaluation led to the addition of a 0.5 FTE guidance counselor position for the middle school grades as well as the addition of a special educator.

## Human Resource Management and Professional Development

To improve student academic performance, school districts must recruit certified teaching staff, offer teacher mentoring programs and professional development opportunities, and evaluate instructional effectiveness on a regular basis in accordance with the provisions of the Education Reform Act of 1993.

### Hiring Practices and Certification

Although the district identified, attracted, and recruited effective teaching personnel, it did not structure its environment to support, develop, improve, and promote effective professional staff members who were successful in advancing achievement for all students.

Almost all paraprofessionals in the district did not meet NCLB criteria, and it was not clear how the district was addressing this deficiency.

### Professional Development

The district did not have a focused professional development plan that addressed the individual needs of new or veteran teachers or new administrators. The professional development program was not a comprehensive, district-wide plan.

Professional development offerings were primarily informed by individual requests and had little coordination with the instructional program, program assessments, staff evaluation, or student achievement data. The evaluation cycle in the teachers' contract included a 'step' that was for professional status teachers to develop individual professional development goals/plans. The building principal was to review and approve these goals/plans. At the end of the cycle, the district expectation was for the teacher to be evaluated on the goals in the professional development plan. A review of a random sample of personnel files indicated a lack of follow through on behalf of school or district administration to review individual teachers' professional develop-

## Performance at a Glance

### Ratings on Performance Indicators

In this area, districts are rated on 12 performance indicators. Lee received the following ratings:



### Areas of Strength

- The Lee school district followed an established process for recruiting and hiring the best candidates for its professional vacancies.

### Areas for Improvement

- Evaluations of administrators were not consistently done on an annual basis.
- Evaluations of non-professional status teachers were not conducted annually for the first three years, which resulted in new teachers attaining professional status without appropriate supervision and evaluation.
- A formal, district-wide professional development plan was not in place. Professional development was building-based. Student data, instructional programs, and evaluations did not inform offerings.

ment goals/plans.

Funding for professional development was appropriate for fiscal year 2005 and previous years, with a combination of local spending, grants, and school choice receipts. According to the school district's End of Year Pupil and Financial Report, professional development expenditures totaled \$90,057 in fiscal year 2005, \$328,478 in fiscal year 2004, \$98,754 in fiscal year 2003, and \$121,728 in fiscal year 2002. School officials and teachers agreed that most professional development requests were honored; however, reimbursement for conferences and expenses were minimal.

The district did not have a formal mentoring plan for new teachers; and it did not have a mentoring plan for administrators. Whether or not individual teachers had Individual Professional Development Plans was not clear and these documents could not be produced.

### Evaluation

Furthermore, little evidence was provided that evaluations of teachers had been completed since the 1990s. The EQA team found that administrators were not held accountable for completing teacher evaluations in accordance with the education reform law. New teachers were attaining professional status by virtue of time worked in the district rather than through mentoring, close supervision, and formal evaluations in accordance with the education reform law. In a random sample of 39 teacher files examined by the EQA team, none were timely, according to the requirements of the Education Reform Act, although the format used did include the Principles of Effective Teaching. Of the summative evaluations read, 11 out of 39 were considered to be informative and one was considered to be instructive and/or capable of promoting professional growth.

Although the former superintendent told the EQA team that she evaluated each administrator on an annual basis, evidence of this was not found in the personnel files or through interviews. The EQA examiners read the evaluations of the eight administrators who worked in the district during the period under review. Of the people in these positions, no evaluations were found for three administrators, and two had not been evaluated since 1996 and 1999, respectively. Two of the evaluations found were timely, signed, and contained components of education reform. Both were informative and one was instructive. One of the evaluations out of eight was considered to promote growth and overall effectiveness. Salary advances for each administrator were pre-determined and were not linked to student performance and/or the use of student performance data. According to school committee interviewees, the current superintendent was informally evaluated mid-way through his first year, at his request.

## Access, Participation and Student Academic Support

Students who are at risk of failing or dropping out need additional support to ensure that they stay in school and achieve proficiency.

### Services

The district used assessment data to identify 'at-risk' students and provided those students with academic support programs. However, with the exception of the students in the Reading Recovery and Title I programs at the elementary school and a few "pull-outs," the academic support services offered were optional and offered after school and/or in the evening. The district had offered an all-day kindergarten program throughout the period under review, and in the fall of 2004 began to offer an integrated pre-K program for at-risk children of pre-school age. Despite the existence of these support services, the percentage of Grade 4 students attaining the proficiency level or above on the MCAS ELA test during the period under review remained relatively flat and, according to the 2005 MCAS results, 60 percent of the students were scoring below the 'Proficient' level.

The district had several programs and practices in place during the period under review to make the transition for students from one grade to the next as smooth as possible.

According to interviewees, although the homeless and/or transient population in the district was considered to be small, the district had a policy in place to ensure that all students entering the district's schools were allowed access to all programs and were provided all services.

Accessibility to higher level courses, including Advanced Placement (AP) courses, was available to all students and parental requests in this regard were honored.

### Performance at a Glance

#### Ratings on Performance Indicators

In this area, districts are rated on 10 performance indicators. Lee received the following ratings:



#### Areas of Strength

- During the period under review, the district used achievement data to identify 'at-risk' students and provided them with additional programs and academic support.
- Early intervention programs were available to primary grade students. The district offered a full-day kindergarten to all students and an integrated pre-school program for special education children needing services.

#### Areas for Improvement

- Academic support programs were primarily after-school and/or evening programs without transportation provided.

## Attendance and Dropouts

The district's student and teacher attendance rates were above the state averages during the period under review and were not deemed problematic by district administrators.

The district's dropout rate was well below the state average and interviewees attributed this fact to the "personal approach" taken by staff members with every at-risk student. The district conveyed the message of "the door is always open" to encourage students to return to school after they had left.

## Discipline and Retention

According to interviewees, the Lee Public Schools had fair and equitable policies, procedures, and practices in place during the period under review that addressed discipline referrals, grade retentions, suspensions, and exclusions. These policies were listed in each school's student-parent handbook and were made accessible to all parents and students. The discipline code listed the offenses that would result in disciplinary action and provided a list of procedures to be followed in order to guarantee all students due process.

The district did not use in-school suspension as a penalty during the period under review and its out-of-school suspension rates decreased in the last three years, from 11.1 percent in 2002-2003 to 0.8 percent in 2004-2005, which was below the state average of 6.1 percent. This pattern of decline was true for subgroup students as well. The out-of-school suspension rate of 1.5 percent for Hispanic students was well below the state average of 11.9 percent. School administrators stated that the major reasons for the decrease in the out-of-school suspension rate were the tightening of the school rules over the past three years and the addition of the Saturday Detention Program. Administrators also told the EQA team that students knew that they were held accountable for their actions.

The retention rate within the district of 2.6 percent was close to the statewide average, with most retained students concentrated at the grade 9 and 10 levels. When asked about this situation, middle/high school administrators stated that the main reason for the retentions was that students had not accrued enough credits to be moved to the next grade level. However, according to interviewees, many of these students were able to make up the lost credits and graduate with their original classmates.

## Financial and Asset Management Effectiveness and Efficiency

Effective districts develop budgets based on student needs, submit financial documentation in a timely fashion, employ staff with MCPPO credentials, and ensure that their facilities are well-maintained.

### Budget Process

The Lee school district's budget process was open and participatory. Town officials and school officials worked together to best meet the budget requests.

Financial management of the district was adequate to ensure that the district's reports were accurate and the processing of payroll and purchases was accurate. The town and school used the same financial accounting system; however, they were not connected. The auditor for the district was Melanson, Heath and Company, P.C. , which had audited the district for at least 10 years. The town officials did seek bids for financial audits, which resulted in the same auditors. The town and school had a written agreement regarding the indirect charges paid by the town on the school's behalf.

The auditors cited the district for lacking a policies and procedures manual for the classification of expenses in the review of the End of Year Pupil and Financial Report in fiscal year 2004. The town's single audits for the years under review did not contain findings or questioned costs. Additionally, the town's annual management letters did not contain school-related findings.

### Financial Support

The town contributed above the minimum required local contribution for fiscal year 2005 and each year under review. The school district relied on school choice reserves to meet its budget requests. The combination of the

## Performance at a Glance

### Ratings on Performance Indicators

In this area, districts are rated on 12 performance indicators. Lee received the following ratings:



### Areas of Strength

- The town and school department had effective lines of communication regarding budget needs, funds, and plans for each fiscal year.
- The district had a formal written agreement for the indirect charges paid by the town on the school's behalf for the period under review. The fiscal year 2005 agreement was the same as the fiscal year 2004 agreement.

### Areas for Improvement

- The district did not analyze or use student achievement data in its budget decisions.
- The limited analysis of subgroup needs resulted in inadequate resources for programs for the identified subgroups.

reserves, the local contribution, and the state aid provided adequate funds for operating the district. The district's allocation of these resources was questioned due to the challenges of the subgroup populations and the lack of resources for the subgroups. Student achievement data were not formally analyzed as a component of the budget process.

The district used purchase orders for all goods and services. The superintendent reviewed, signed, and approved all purchase orders. The district and town were in compliance with GASB NO. 34. The threshold for capitalizing assets was \$10,000, and at the end of each fiscal year the school and town accountants updated the asset records. They monitored technology purchases using the serial numbers. Textbooks were inventoried each year.

### Facilities

For the period under review, the school district did not have a formal capital improvement plan. It concentrated capital planning on the new elementary school, which opened in 2003, and the renovation of the middle/high school, which occurred in 2002. The Lee Elementary School, grades Pre-K-6, was built in 2002. It had an enrollment of 410 and was listed in "Excellent" condition. The Lee Middle/High School, grades 7-12, was built in 1963 and renovated in 2003. It had an enrollment of 503 and was listed as being in "Excellent" condition. Based on walkthroughs of the facilities, the EQA examiners found that the Lee Middle/High School was clean, safe, well-lit, and well-maintained. The school had clearly labeled classrooms and offices. Classrooms were well equipped with supplies, materials, and technology. Class size was an issue, due to the increase of school choice students in the district. The Lee Elementary School was clean, safe, well-lit, and well-maintained. Doors were secure. Traffic flow was an issue during the morning and afternoon drop-off and pick-up times.

No formal, written preventative maintenance program existed; however, the district had two maintenance staff members who were responsible for all building maintenance in the district. The district also contracted out certain maintenance projects such as HVAC maintenance. According to the current administration, the prior facilities manager had the MCPPO certification.

---

## CONCLUSION

The EOA examination found the Lee Public Schools to be a 'Moderate' performing district, marked by student achievement that was 'High' in ELA and 'Low' in math on the MCAS tests. Approximately half of all Lee students scored above standard on the 2005 administration of the MCAS test. The district earned a Management Quality Index of 'Poor,' with high performance in the area of access, participation and student academic support, and low performance on the leadership, curriculum, assessment, and human resources standards.

Lee and a neighboring, smaller town, Tyringham, constitute Supervisory Union #29. The towns have equal shares in hiring, evaluating, and firing the district superintendent even though Lee's population size is much greater than Tyringham's. Each town maintains a separate school committee, though the children from both towns attend the schools located in Lee, consisting of Lee Elementary and Lee Middle/High School. Lee met the state-mandated Net School Spending requirement during the review period, and the towns contributed above the minimum required local contribution for fiscal year 2005 and each year under review. Student achievement data were not formally analyzed as a component of the budget process. The district did not allocate its resources to best meet the needs of its subgroup populations, primarily low-income, special education, and Hispanic students.

According to members of the school committee, a key challenge for the district is to build a consistent team of administrators who can remain with the district for the long term and create strategic plans to move the district forward. The district experienced high turnover, with four superintendents in as many years. There were the two new principals at the elementary and middle/high schools, a new assistant principal at the middle/high school, and the position of special education director changed. While the Tyringham School Committee's membership remained the same, the composition of the Lee School Committee changed, as four members stepped down for various reasons.

The district did not have a standards-based District Improvement Plan (DIP), complete with measurable goals, action plans, and timelines. Each school council developed a SIP, but the goals contained within each plan did not address student achievement, the use of data, timelines associated with action plans, or the persons accountable for accomplishing the goals.

Another challenge for the district is to align the curricular material taught at Lee with the Massachusetts curriculum frameworks. Presently, vertical articulation of the curriculum does not exist in grades Pre-Kindergarten-12. The school district lacked a complete, written curriculum in all subject areas including components such as the material taught, a pacing chart,

formative assessments, benchmarks, common summative assessments, resources to be used, and activities for differentiating instruction for remedial and advanced learners.

The district also needs to increase its ability to analyze student achievement data so that its use is widespread down to the classroom level, and this information can be used to make decisions regarding instruction, staffing, the delivery of services, and setting priorities such as a long-term capital plan. According to the elementary and middle/high school principals, the schools did not adjust instructional time in ELA and math based on the analysis of MCAS data. The current superintendent stated that prior to his administration, most district administrators and teachers did not realize that Lee had not made AYP in math.

During the period under review, the district used achievement data to identify 'at-risk' students and provided them with additional programs and academic support. Early intervention programs were available to primary grade students. The district offered a full-day kindergarten to all students and an integrated pre-school program for special education children needing services. Despite the existence of these support services, the percentage of Grade 4 students attaining the proficiency level or above on the MCAS ELA test during the period under review remained relatively flat and, according to the 2005 MCAS results, 60 percent of the students were scoring below the 'Proficient' level.

Additional challenges include establishing accountability for the supervision of the implementation of the written curriculum, and aligning the evaluation system with the state education reform law of 1993. In order to accomplish these challenges, professional development needs attention as a primary goal in the as yet unwritten District Improvement Plan in order to support staff in making the changes in practice required to raise student achievement. No formal, district-wide professional development plan was in place. Professional development was building-based. Student data, instructional programs, and evaluations did not inform offerings.

According to school committee interviewees, the current superintendent was informally evaluated mid-way through his first year, at his request. The district files provided no evidence of a sustained evaluation process for all members of the administrative team. Salary increases for each administrator were pre-determined and were not linked to student performance and/or the use of student performance data. Evaluations of non-professional status teachers were not conducted annually for the first three years, which resulted in new teachers attaining professional status without appropriate supervision and evaluation.

---

## APPENDIX A: EQA'S DISTRICT EXAMINATION PROCESS

EQA's examination process provides successively deeper levels of information about student performance. All school districts receive an MCAS data review annually, but they do not all receive the on-site visit every year.

Based on the MCAS results, Educational Management Audit Council (EMAC) policy, and random sampling, approximately 60 districts statewide received an on-site review. Still other districts – those that do not meet certain performance criteria set by the state Department of Education – received an even more detailed review.

### *Data-Driven Assessment*

Annually, the DOE and EQA's staff assess each public school district's results on the Massachusetts Comprehensive Assessment System (MCAS) tests to find out how students are performing. This review seeks to answer five basic questions:

1. Are the district's students reaching proficient levels on MCAS?
2. Do MCAS test results vary among subgroups of students (such as minority and low-income students and students with disabilities)?
3. Has the district's MCAS test performance improved over time?
4. Has the MCAS test performance of the district's student subgroups improved over time?
5. Are all eligible students participating in all required programs and assessments?

### *Standards-Based Examination*

Districts with MCAS results that fall within certain thresholds of performance, particularly districts that score below average, may be selected to receive an on-site review. This review seeks to provide a more complete picture of why the district is performing at that level, examining district management, planning and actions and how they are implemented at the building level. It focuses in particular on whether the district uses data to inform its efforts.

The report analyzes district performance in six major areas: leadership, governance, and communication; curriculum and instruction; assessment and evaluation; human resource management and professional development; access, participation, and student academic support; and financial and asset management effectiveness and efficiency. EQA examines a total of 64 indicators to assess whether the district is meeting the standards and provides a rating for each indicator.

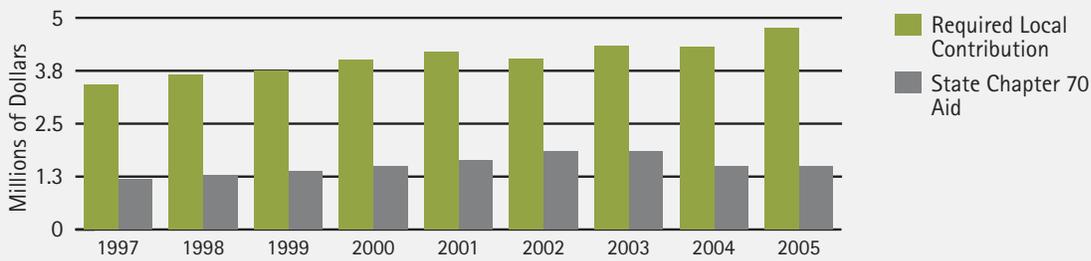
## APPENDIX B: GLOSSARY OF TERMS USED IN EQA TECHNICAL REPORTS

<b>ABA:</b> Applied Behavioral Analysis	<b>FTE:</b> Full-Time Equivalent	<b>MQI:</b> Management Quality Index – an indicator of the relative strength and effectiveness of a district’s management system
<b>ADA:</b> Average Daily Attendance	<b>FY:</b> Fiscal Year	<b>MUNIS:</b> Municipal Information System
<b>ALT:</b> MCAS Alternative Assessment	<b>Gap Analysis:</b> A statistical method to analyze the relationships between and among district and subgroup performance and the standard of 100 percent proficiency	<b>NAEYC:</b> National Association for the Education of Young Children
<b>API:</b> Average Proficiency Index (of the English Language Arts Proficiency Index and Math Proficiency Index for all students)	<b>GASB:</b> Government Accounting Standards Board	<b>NCLB:</b> No Child Left Behind
<b>ATA:</b> Accountability and Targeted Assistance	<b>GMADE:</b> Group Math Assessment and Diagnostic Evaluation	<b>NEASC:</b> New England Association of Schools and Colleges
<b>AYP:</b> Adequate Yearly Progress	<b>GRADE:</b> Group Reading Assessment and Diagnostic Evaluation	<b>NRT:</b> Norm-Referenced Test
<b>CAP:</b> Corrective Action Plan	<b>GRADU:</b> The graduation yield rate for a class four years from entry	<b>NSBA:</b> National School Boards Association
<b>CBM:</b> Curriculum-Based Measures	<b>IEP:</b> Individualized Education Program	<b>NSS:</b> Net School Spending
<b>CD:</b> Competency Determination – the state’s interim Adequate Yearly Progress indicator for high schools based on grade 10 MCAS test passing rates	<b>Improvement Gap:</b> A measure of change in a combination of the proficiency gap and performance gap between two points in time; a positive improvement gap will show improvement and convergence between subgroups’ performance over time	<b>Performance Gap:</b> A measure of the range of the difference of performance between any subgroup’s Proficiency Index and another subgroup’s in a given district
<b>CMP:</b> Connected Math Program	<b>IPDP:</b> Individual Professional Development Plan	<b>PI:</b> Proficiency Index – a number between 0–100 representing the extent to which students are progressing toward proficiency
<b>CORI:</b> Criminal Offender Record Information	<b>IRIP:</b> Individual Reading Improvement Plan	<b>PIM:</b> Performance Improvement Management
<b>CPI:</b> Composite Proficiency Index – a 100-point index combining students’ scores on the standard MCAS and MCAS Alternative Assessment (ALT)	<b>ISSP:</b> Individual Student Success Plan	<b>POA:</b> Program Quality Assurance – a division of the DOE responsible for conducting the Coordinated Program Review process
<b>CPR:</b> Coordinated Program Review – conducted on Federal Education Acts by the DOE	<b>LASW:</b> Looking at Student Work	<b>Proficiency Gap:</b> A measure of a district or subgroup’s Proficiency Index and its distance from 100 percent proficiency
<b>CRT:</b> Criterion-Referenced Test	<b>LEP:</b> Limited English Proficient	<b>QRI:</b> Qualitative Reading Inventory
<b>CSR:</b> Comprehensive School Reform	<b>MASBO:</b> Massachusetts Association of School Business Officials	<b>Rate of Improvement:</b> The result of dividing the gain (improvement in achievement as measured by Proficiency Index points) by the proficiency gap
<b>DCAP:</b> District Curriculum Accommodation Plan	<b>MASC:</b> Massachusetts Association of School Committees	<b>SAT:</b> Scholastic Achievement Test administered by the Educational Testing Service to 11th and 12th graders
<b>DIBELS:</b> Dynamic Indicators of Basic Early Literacy Skills	<b>MASS:</b> Massachusetts Association of School Superintendents	<b>SEI:</b> Sheltered English Immersion
<b>DIP:</b> District Improvement Plan	<b>MAVA:</b> Massachusetts Association of Vocational Administrators	<b>SIMS:</b> Student Information Management System
<b>DOE:</b> Department of Education	<b>MCAS:</b> Massachusetts Comprehensive Assessment System	<b>SIOP:</b> Sheltered Instruction Observation Protocol
<b>DPDP:</b> District Professional Development Plan	<b>MCAS-Alt:</b> Alternative Assessment – a portfolio option for special-needs students to demonstrate proficiency	<b>SIP:</b> School Improvement Plan
<b>DRA:</b> Developmental Reading Assessment	<b>MCPPPO:</b> Massachusetts Certified Public Purchasing Official	<b>SPED:</b> Special Education
<b>ELA:</b> English Language Arts	<b>MELA-O:</b> Massachusetts English Language Assessment-Oral	<b>STE:</b> Science Technology Engineering
<b>ELL:</b> English Language Learners	<b>MEPA:</b> Massachusetts English Proficiency Assessment	<b>TerraNova:</b> K–12 norm-referenced test series published by CTB/McGraw-Hill
<b>EPI:</b> English Language Arts Proficiency Index	<b>MPI:</b> Math Proficiency Index	
<b>ESL:</b> English as a Second Language		
<b>FLNE:</b> First Language Not English		
<b>FRL/N:</b> Free and Reduced-Price Lunch/No		
<b>FRL/Y:</b> Free and Reduced-Price Lunch/Yes		

### APPENDIX C: STATE AND LOCAL FUNDING, 1997-2005

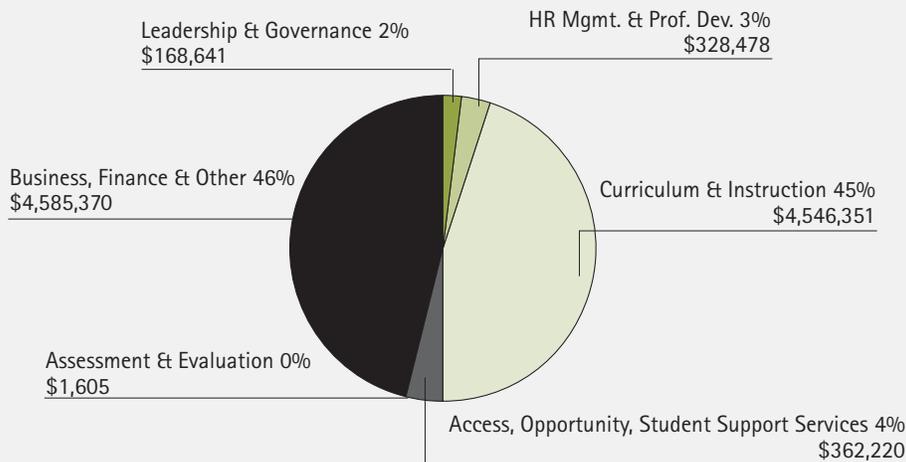
A school district's funding is partly determined by the Chapter 70 program – the major program of state aid to public elementary and secondary schools. In addition to providing state aid to support school operations, it also establishes minimum requirements for each municipality's share of school costs. The following chart shows the amount of Lee Public Schools' funding derived from the state and the amount that the town was required to contribute. For the nine-year period, FY97 to FY05, Lee met the state-mandated net school spending requirement. During the same period, Chapter 70 aid to Lee increased 24.7 percent (from \$1,188,870 to \$1,482,316). Lee's required local contribution increased 38.7 percent (from \$3,427,415 to \$4,754,262). Since FY97, Lee received a total of \$13,625,829 in Chapter 70 aid and was required to raise locally \$36,441,679.

#### WHERE DOES THE FUNDING FOR LEE PUBLIC SCHOOLS COME FROM?



#### HOW IS THE FUNDING FOR LEE PUBLIC SCHOOLS ALLOCATED?

*FY04 Expenditures By EQA Standards (With City/Town Charges), based on the district's submission to the DOE at the time of the EQA's on-site review.*





EDUCATIONAL MANAGEMENT AUDIT COUNCIL  
*Office of Educational Quality and Accountability*

One Ashburton Place, Room 1403, Boston, MA 02108 ■ (617) 727-2398 ■ Fax: (617) 727-0049