

District Review Report

Lee Public Schools

Review conducted November 17-21, 2014



Center for District and School Accountability

Massachusetts Department of Elementary and
Secondary Education

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Lee Public Schools District Review Overview

Purpose

Conducted under Chapter 15, Section 55A of the Massachusetts General Laws, district reviews support local school districts in establishing or strengthening a cycle of continuous improvement. Reviews consider carefully the effectiveness of systemwide functions, with reference to the six district standards used by the Department of Elementary and Secondary Education (ESE): leadership and governance, curriculum and instruction, assessment, human resources and professional development, student support, and financial and asset management. Reviews identify systems and practices that may be impeding improvement as well as those most likely to be contributing to positive results.

Districts reviewed in the 2014-2015 school year include districts classified into Level 2, Level 3, and Level 4 of ESE's framework for district accountability and assistance. Review reports may be used by ESE and the district to establish priority for assistance and make resource allocation decisions.

Methodology

Reviews collect evidence for each of the six district standards above. A district review team consisting of independent consultants with expertise in each of the district standards reviews documentation, data, and reports for two days before conducting a four-day district visit that includes visits to individual schools. The team conducts interviews and focus group sessions with such stakeholders as school committee members, teachers' association representatives, administrators, teachers, parents, and students. Team members also observe classroom instructional practice. Subsequent to the onsite review, the team meets for two days to develop findings and recommendations before submitting a draft report to ESE. *District review reports focus primarily on the system's most significant strengths and challenges, with an emphasis on identifying areas for improvement.*

Site Visit

The site visit to the Lee School District was conducted from November 17-21, 2014. The site visit included 22 hours of interviews and focus groups with approximately 32 stakeholders, including school committee members, district administrators, school staff, students, and teachers' association representatives. The review team conducted 2 focus groups with 4 elementary school teachers and 9 middle and high school teachers.

A list of review team members, information about review activities, and the site visit schedule are in Appendix A, and Appendix B provides information about enrollment, student performance, and expenditures. The team observed classroom instructional practice in 29 classrooms in 2 schools. The team collected data using an instructional inventory, a tool for recording observed characteristics of standards-based teaching. This data is contained in Appendix C.

District Profile

The Lee school district has a town manager form of government and the chair of the school committee is elected. There are 7 members of the school committee and they meet bi-weekly.

The current interim superintendent has been in the position since 2013. The district leadership team includes the superintendent, the elementary principal, the middle and high school principal, the director of special education, and the business coordinator. Central office positions have been mostly stable in number, with the exception of the establishment and elimination of the curriculum director position during the last two years. The district has 2 principals leading 2 schools. There are no other school administrators. There are 71 teachers in the district.

In the 2013-2014 school year, 720 students were enrolled in the district's 2 schools:

**Table 1: Lee Public Schools
Schools, Type, Grades Served, and Enrollment*, 2013-2014**

School Name	School Type	Grades Served	Enrollment
Lee Elementary School	ES	PK-06	348
Lee Middle and High School	MSHS	07-12	372
Totals	2 schools	PK-12	720
*As of October 1, 2013			

Between 2010 and 2014 overall student enrollment decreased by 14.2 percent. Enrollment figures by race/ethnicity and high needs populations (i.e., students with disabilities, students from low-income families, and English language learners (ELLs) and former ELLs) as compared with the state are provided in Tables B1a and B1b in Appendix B.

Total in-district per-pupil expenditures were higher than the median in-district per pupil expenditures for a small rural district of similar size (less than 1,000 students) in fiscal year 2013. Total in-district per-pupil expenditures were \$15,929 as compared with a median of \$14,215. Actual net school spending has been well above what is required by the Chapter 70 state education aid program, as shown in Table B8 in Appendix B.

Student Performance

Lee is a Level 2 district because both its schools are in Level 2.

- Lee Elementary is in the 50th percentile of elementary schools and is in Level 2 for not reaching the Cumulative Progress Performance Index (PPI) target of 75 for all students and/or high needs students.

- Lee Middle and High School is in the 30th percentile of middle/high schools and is in Level 2 with a cumulative PPI of 66 for all students and 62 for high needs students; the target is 75.

The district reached its 2014 Composite Performance Index (CPI) target for math but did not reach its targets for ELA and math.

- ELA CPI was 86.2 in 2014, below the district's target of 91.2.
- Math CPI was 82.3 in 2014 and was considered on the district's target of 82.8.
- Science CPI was 77.0 in 2014, below the district's target of 84.1.

ELA proficiency rates were below the state rate for the district as whole and in the 3rd, 5th, and 6th grades, with notable declines in ELA proficiency in the 5th and 6th grades.

- ELA proficiency for all students in the district was 66 percent in 2011 and 2014, below the state rate of 69 percent.
- ELA proficiency in 2014 was above the state rate by 1 to 3 percentage points in the 4th, 7th, 8th, and 10th grades.
 - ELA proficiency rates improved between 2011 and 2014 by 10 and 15 percentage points in the 4th and 7th grades, respectively, and by 4 and 5 percentage points in the 8th and 10th grades, respectively.
- ELA proficiency rates were below the state rates by 9 to 13 percentage points in the 3rd, 5th, and 6th grades and between 2011 and 2014 declined by 14 and 19 percentage points in the 5th and 6th grades, respectively.
 - In the 5th grade students' MCAS scores were below the state for the Language Anchor Standard and in the 6th grade for open response questions.

Math proficiency rates increased between 2011 and 2014 in the district as a whole and in every test grade, especially in the 4th grade.

- Math proficiency rates for all students in the district increased 10 percentage points, from 52 percent in 2011 to 62 percent in 2014, above the state rate of 60 percent.
- Math proficiency rates increased between 2011 and 2014 by 28 percentage points in the 4th grade, by 15 and 11 percentage points in the 6th and 7th grades, respectively, and by 2 to 4 percentage points in the 3rd, 5th, 8th, and 10th grades.
 - Math proficiency rates were above the state rates by 13 and 12 percentage points in the 4th and 5th grades and by 5 percentage points in the 6th grade.
- In 2014 math proficiency rates were below the state rates by 15 percentage points in the 3rd grade and by 2 to 3 percentage points in the 7th, 8th, and 10th grades.

- In the 3rd grade students' MCAS scores were below the state for representing and interpreting data and solving problems involving measurement and estimation under the Measurement and Data Standard, and below the state in the Number and Operations-Fractions standard.

Science proficiency for the district as whole was 50 percent, below the state rate of 55 percent.

Science proficiency rates in the district were also below the state rates for the 5th and 10th grades.

- 5th grade science proficiency rates declined from 52 percent in 2011 to 46 percent in 2014, below the state rate of 53 percent.
- 8th grade science proficiency rates increased from 20 percent in 2011 to 42 percent in 2014, equal to the state rate for the 8th grade of 42 percent.
- 10th grade science proficiency rates decreased from 81 percent in 2011 to 60 percent in 2014, below the state rate of 71 percent.

The 2013 four year cohort graduation rate was slightly below the target of 80.0 percent but the 2012 five year cohort graduation rate reached the target of 85.0 percent.¹

- The four year cohort graduation rate declined from 82.9 percent in 2010 to 79.8 percent in 2013, below the state rate of 85.0 percent.
- The five year cohort graduation rate increased from 78.3 percent in 2009 to 90.7 percent in 2012, above the state rate of 87.5 percent.
- The annual dropout rate declined from 3.2 percent in 2010 to 1.8 percent in 2013, below the statewide rate of 2.2 percent.

¹ 2014 graduation targets are 80 percent for the four year and 85 percent for the five year cohort graduation rates and refer to the 2013 four year cohort graduation rate and 2012 five year cohort graduation rates.

Lee Public Schools District Review Findings

Strengths

Leadership and Governance

- 1. The district is characterized by an appropriately organized governance structure, a strong sense of community, and a commitment to the education of its young people.**
 - A.** The school committee governs through the recent establishment of broad-based policies.
 1. Documents showed and interviews confirmed that the school committee has recently completed a comprehensive review of its policies and has implemented provisions for their regular review and modification.
 - B.** Interviews with the school committee and with school leaders indicated that the school committee appropriately influences the direct operation of the school system.
 - C.** The district is marked by a culture of collaboration between town and school district officials and between the school district and the teachers' association.
 1. Interviews with the superintendent and the town administrator showed the cooperation between these key administrators. They used words such as "open" and "transparent" to describe their relationship.
 2. Similarly, interviews with the superintendent and the business coordinator indicated a strong working relationship between the district and town committees. The superintendent described the relationship between town boards and the district as positive, both professionally and personally.
 3. The strong collaborative atmosphere was further evidenced in review team interviews with key teachers' association leaders. These district leaders described an environment marked by open communication with administration and a willingness to solve problems between the parties. Teachers' association leaders were hard pressed to recall the date of the last formal labor grievance.
 - D.** School committee members, school leaders, teachers, and students attested to the commitment in the district to students' education.
 1. Lee Elementary School has a functioning tiered intervention system as well an aggressive pre-referral process. These have combined to reduce referrals for special education services while serving students' educational needs.
 2. Lee Middle and High School takes a personal approach to student intervention.

- a. The middle school counselor spends time in classes each day to understand student progress and to be better positioned to provide support during students' regular visits to his office.
 - b. The dean of students provides his personal cell phone number to students and their families to facilitate the referral of students in need of support.
3. Teachers in a focus group reported that they do whatever is necessary to support the education of their students, in some cases by supplementing educational materials and by developing curriculum on their own.
4. Finally the clean and well-maintained buildings that greet students every day testify to the community's pride and to its commitment to its young people.

Impact: The district has established its leadership and governance structures in ways that leave the district well positioned to meet the challenges it currently faces.

Student Support

2. The district provides academic and social/emotional support to its students.

- A.** Using Title I funds, the district provides academic support for its students.
 1. A four-week summer Title I program provides support for low-achieving students who otherwise might be retained in grade.
 2. Homework Help sessions are provided before and after school at both the elementary and middle and high schools.
 - a. District staff reported that a majority of students who accessed Homework Help this past year improved the grades on their report cards.
 3. The district increased summer programming for students leaving 6th and 7th grades with failing math or ELA grades.
- B.** Middle school students participate in Character Education/Career Exploration/College Readiness programs provided both by community agencies and businesses in town and by the school.
 1. The Lee Youth Association provides support to the schools through its sponsorship of various career exploration opportunities and especially through the after-school recreational opportunities it provides.
 2. The Berkshire County District Attorney's office sponsors a mentor leadership program to reduce risky behaviors and to increase leadership skills.

3. The Berkshire Center for the Prevention of Violence, Elizabeth Freeman Center, Gladys Bingham Center, Girls Inc., and the Bren Center all provide workshops for middle-level students concerning fostering healthy relationships, making positive choices, and developing an awareness of post-secondary options.
 4. Students also attend the Students Teaching Respect, Integrity, Values, and Equality (STRIVE) workshop, sponsored by the Berkshire County District Attorney's office and the Deanna Educational Theater at the Lee Middle and High School to learn about technology issues, such as safe use of the Internet.
 5. Other programs for middle school students include the Peer Leadership Training Program, the Middle School Behavior Expectation Program, the Middle School Aspirations Class, and Bullying Prevention Activities, all intended to improve aspects of social and emotional health among students.
- C.** High school students increase their preparedness for college and career by taking advantage of a number of opportunities.
1. The Lee Middle and High School web site details several programs and technological sources of assistance for parents and students.
 - a. The Naviance online tool provides assistance with college and scholarship applications.
 - b. Many high school juniors and seniors participate in both in- and out-of-school internship programs. The off-campus programs are considered electives and provide both real-world applications for academic attainments, as well as practical experience in a work environment. In-school internships enable students to explore careers in education by tutoring.
 - c. The middle and high school principal has begun holding evening office hours to increase visibility and to provide an additional access point between the home and school.
 - d. The middle and high school has begun using the School Way application to increase parental access to school events. School Way provides school updates and information, safety notifications, teacher updates and assignment details, and club and organization updates.
- D.** Administrators, teachers, students, and parents expressed satisfaction with communications between home and school.
1. The elementary school uses the "Friday Folder," which all teachers prepare a for each student on Fridays. The folder contains returned and graded assignments, student progress reports, personal messages about the students, and both classroom and school announcements. The folder has become established and parents reported looking forward to the weekly communication.

- E. Both schools have Student Intervention Teams to support high-risk students. The teams, consisting of teachers, administrators, counselors, school psychologists, and on some occasions parents, meet regularly to address critical student needs as identified by academic performance, attendance, or observed social or disciplinary issues. Counselors also reported referrals by parents and students.
- F. The elementary school provides tiered systems of support for its students. Administrators at the middle and high school have identified a tiered support system as a priority for the next school year.

Impact: By providing students with an array of academic and social/emotional supports, the district has established a learning environment where effective educational practices can take hold and develop.

Challenges and Areas for Growth

It is important to note that district review reports prioritize identifying challenges and areas for growth in order to promote a cycle of continuous improvement; the report deliberately describes the district's challenges and concerns in greater detail than the strengths identified during the review.

Leadership and Governance

3. The district is beginning to use its strategic plan to drive the work of the district, but annual planning is not taking place at the school level.

- A. The school committee adopted the district's current five-year strategic plan, covering the years 2011 to 2016, on December 7, 2010.
 - 1. A review of the plan showed that it contains a number of elements commonly found in a strategic plan.
 - a. The plan contains mission and guiding belief statements that provide the grounding and purpose for the district's work.
 - b. There are goals in five general areas: curriculum, technology, community collaboration, teaching and learning, and student wellness.
 - c. The plan lists Implementation objectives for each goal.
 - 2. The initiatives outlined in the 2011-2016 plan do not contain accountability measures commonly found in improvement plans such as timelines, benchmarks, responsible parties, and budgetary impacts.
- B. A review of school committee minutes indicated and interviews with the superintendent confirmed that the district did not review the strategic plan regularly between 2010 and 2013.

1. School committee minutes indicated that upon assuming his position the superintendent reconvened a number of committees to examine the continued relevance of the plan to district improvement efforts.
 - a. The superintendent told the review team that the plan had been “on the shelf” when he arrived and that he has been taking steps to connect district activities with the strategic plan.
 - b. The superintendent submitted updated strategic plan goals and objectives on August 25, 2014.

B. Annual improvement planning has not taken place at either Lee Elementary School or Lee Middle and High School.

1. Lee Middle and High School does not have a school improvement plan.
2. Lee Elementary School has a three-year improvement plan.

Impact: Without more focused improvement planning, district and school effectiveness is compromised. While important to all districts, sound planning is especially crucial in districts undergoing transition. Without precise planning, the district may miss key opportunities to define its future and improve the achievement of the students who are so valued by this close-knit community.

Curriculum and Instruction

4. In observed classrooms review team members found low incidence of productive learning routines such as students engaged in challenging tasks or students responding to questions by elaborating on their own thinking. This was true for results disaggregated for elementary, middle, and high school and for combined results across the levels.

The team observed 29 classes throughout the district: 17 at the middle and high school, 7 of which were in grades 7 and 8, 10 in grades 9–12, and 12 at the elementary school. The team observed 13 ELA classes, 7 mathematics classes, and 9 classes in other subject areas. Among the classes observed were two special education classes, and one ELL class. The observations were approximately 20 minutes in length. All review team members collected data using ESE’s instructional inventory, a tool for recording observed characteristics of standards-based teaching. This data is presented in Appendix C.

- A.** Of the eight research-based characteristics of effective teaching and learning on the instructional inventory, the team observed students engaged in productive learning routines (#17) clearly and consistently in 52 percent of the observations across all levels; this was the only characteristic of effective teaching and learning observed in more than 50 percent of classes.

1. The team found clear and consistent evidence of the remaining seven characteristics of strong learning in between 7 to 31 percent of the observations.
 - a. Across the grades, students made connections to prior knowledge, real world experiences & other subject matter (#22) in 7 percent of the classes visited.
 - b. Students, in their responses to questions, elaborated about content and ideas (#21) in only 31 percent of the observed classes.
 - c. Across the grades, in 7 percent of the observed classes there was clear and consistent evidence that student work demonstrated high quality and could serve as exemplars (#24).
 - d. Across the grades, in 28 percent of the visited classrooms, there was clear and consistent evidence that students articulated their thinking or reasoning verbally or in writing either individually, in pairs, or in groups (#20).
2. On six of eight characteristics, classrooms at the elementary level showed a higher incidence of clear and consistent evidence of elements of effective teaching and learning than classrooms at the middle and high school levels.
 - a. Students were observed engaged in productive learning routines (#17) in 75 percent of the observed classes at the elementary level, in 43 percent at the middle level, and in 30 percent at the high school level.
 - b. Students were observed engaged in challenging academic tasks (#18) in 50 percent of observed classrooms at the elementary level, in 29 percent at the middle school level, and in 30 percent at the high school level.
3. At the high school level, clear and consistent evidence of the eight characteristics of effective teaching and learning was noted in between 0 percent to 30 percent of observed classes.
 - a. There was clear and consistent evidence of high school students using technology as a tool for learning and/or understanding (#23) in 20 percent of classrooms visited.
 - b. The team saw clear and consistent evidence of high school students assuming responsibility for their own learning (#19) in 20 percent of the classes.

Impact: When classroom instruction provides ongoing opportunities for students to engage in challenging work, explain their thinking, and make connections to prior knowledge or previous experiences, students grow as learners. The low incidence in the district of characteristics of active engaged learning means that students do not currently have sufficient opportunities to develop as independent learners.

5. The curriculum document templates at the elementary school and at the middle and high school are developed at each school independently and both are missing some important components.

- A.** A document review showed that, at each level, the elements included in the curriculum maps vary, but neither includes instructional strategies, and most do not have assessments included with sufficient specificity.
1. At the elementary level, the elements of the curriculum maps specified include the Week/Learning Standard and Description/Reading Resources/Vocabulary and Additional Resources/Assessment.
 - a. In the Additional Resources/Assessment column, there are few references to assessments that specify how the teacher is to measure student mastery of the standard being addressed.
 - i. Instead, for example, on the grade 1 ELA map, there is repetition of the names of programs (Discovery Education, Encarta Kids, Enchanted Learning).
 - ii. On the grade 6 science map, resources are listed, but not assessments.
 2. At the middle and high school level, the elements included in the curriculum maps vary, but all are listed in the following columns: Content, Standards, Essential Skills/Knowledge, Assessments, and Resources.
 - a. In the Standards column in all the samples reviewed, standards are referenced only by a list of notations (for example, A.REI.1, A.CED.1, L1, L2). These notations do not focus the teacher on the specific content of the standard being addressed.
 - b. In the Essential Skills/Knowledge column, the skills listed generally include objectives, but it is not clear where the objective statements come from.
 - c. Under the Assessments column, what is included varies from specific detailed assessments (completion of comparative graphic organizers between the 1800s and today) to repeated formulaic lists such as Daily Warm-up, Exit Ticket, and Weekly Quiz.
 - d. Listed under Resources may be the single word Textbook or as in one curriculum map, a complete list of specific textbook, articles, and several poems.
- B.** Horizontal alignment of curriculum is in place at the middle and high school but is not monitored at the elementary school.
1. Since, with one exception, teachers at the middle and high school teach all sections of a course, whether one or two, one can assume that students in separate sections of a particular course are taught similar content.

2. At the elementary school, in those instances where curriculum documents are complete, they have been developed by a team of similar grade level teachers who have agreed on the curriculum content. When the curriculum is complete and implemented, there is then some assurance that students at particular grades are receiving similar content. The principal did not indicate that she monitors curriculum implementation, and the department head has a full-time teaching assignment and is not available or responsible for such supervision.
- C. Vertical alignment of curriculum at the middle and high school is not evident, and is in progress at the elementary school.
1. At the middle and high school, individual teachers have sole responsibility for developing curriculum maps for the courses they teach, and the team found little evidence that a teacher developing a curriculum map ensures that a course that takes place in a sequence builds upon what is taught in the course that precedes it or that it leads into what is taught in a course later in the sequence.
 2. At the elementary school there is a mechanism in place to address vertical alignment.
 - a. The principal gathers curriculum teams in specific content areas with representation from each grade level and works with the team to establish vertical alignment. Curriculum teams meet every 5 or 6 weeks to do this work.
- D. It is unclear at both the elementary and the middle and high school level whether curriculum maps are aligned with standards in the current Massachusetts Curriculum Frameworks.
1. On middle and high school curriculum maps, the references to standards are frequently lengthy lists of notations with no indications as to what the notations reference either as to source or as to content. The maps also include essential skills, but it is not clear where they come from, whether from the state frameworks or elsewhere.
 2. At the elementary school, the grade 6 science curriculum map refers in the Learning Standards and Description column to some broad understandings with no reference to their source. The first grade ELA map refers in some cases to a standards notation, but some notations appear to be missing.

Impact: Without a districtwide system in place for the leadership and management of curriculum, the district cannot ensure that the curriculum is complete or that it is aligned vertically, horizontally and with current state frameworks.

6. The elementary school is not providing its students with the components of a complete elementary language arts curriculum.

- A. Instead of purchasing a publisher's elementary language arts program suitable for its students, the elementary school has been working to select and implement the components of an elementary language arts program separately.

1. The school has adopted a phonics program that teachers in interviews frequently expressed their satisfaction with, and team members observed it frequently in use in language arts classrooms in grades 1-4.
2. Elementary teachers referred to a writing program that is no longer in use. Adoption of a writing program is under discussion.
3. Review team members noted the infrequent availability of rich literacy materials in elementary classrooms.

B. Teachers agreed that they needed an elementary language arts program, but expressed their desire to adopt a program that would allow them to continue to implement their phonics program. They said that were reluctant to adopt an elementary program that might replace their phonics program.

Impact: Without all the components of an elementary language arts program, the ELA program at the elementary school is limited. Teacher commitment to the phonics program may be inhibiting both an open discussion of the potential positive aspects of such an adoption and the possible limitations of the program now in place.

Assessment

7. The district has not developed a comprehensive and coordinated K-12 assessment system with the capacity to collect, to analyze, and to disseminate student performance data and to fully inform policy and decision making about program improvements, assessment practices, professional development, and educator evaluation.

A. The district does not have a comprehensive, coordinated, and balanced system of common formative, summative, and benchmark assessments, either standardized or locally developed, to accurately determine both student and district needs. The elementary school, however, has begun to make expanded use of student assessment data.

1. The responsibility for data collection and analysis rests with the individual schools and their principals. District policies, structures, or procedures do not exist to guide or support K-12 assessment policies or practices.
 - a. The district has not developed a centralized system or structure, either at the district or school levels, whereby it can collect, compile, analyze, and disseminate multiple sources of student data. Interviewees stated that teachers and schools are essentially “on their own” when it comes to using data.

2. There is little in the Lee Strategic Plan to suggest that data is a district priority; interviewees reported that data teams do not exist at either the district or the middle and high school levels, and said that they knew of no plans to create them.
 3. High school administration and staff acknowledged that there are no common formative, summative, or benchmark assessments currently in place and---with the exception of MCAS results---no reliable student data with which to monitor student learning or measure program effectiveness.
 - a. The principal indicated that the Star Reading and Star Math programs may be introduced in 2014-2015.
- B.** The district is currently working to develop District Determined Measures (DDMs) in accordance with requirements for the implementation of the new state educator evaluation framework. In June 2014 the district submitted to ESE's Center for Educator Effectiveness a DDM Implementation Plan for the 2014-2015 school year, requesting a blanket extension. In July 2014 the district submitted a revised plan indicating that it was fully ready to implement the DDM Plan. Interviewees indicated that more progress has been made in this work at the elementary school than at the middle and high school.
1. The DDM initiative is primarily the responsibility of the school principals, who said that because of an absence of resources, technical expertise, and professional development/common planning time for staff, they were uncertain about their ability to develop appropriate DDMs in all grades and subject areas for the 2014-2015 school year.
 2. Administrators also expressed concern about their capacity to meet the next stage in the implementation of the new educator evaluation system. This will require that districts establish patterns and trends using multiple measures of student learning, growth, and achievement s to establish a valid "Student Impact Rating."
- C.** Under the leadership of the principal, the elementary school has begun to make more and better use of student performance data and to develop data literacy among its faculty.
1. Interviewees said that at the elementary school, AIMSweb, Columbia Reading, and Go Math assessment programs are used at all grade levels. The principal manually compiles all results, including relevant MCAS data, on spreadsheets that are distributed to staff and formally reviewed in grade-level and vertical faculty meetings, as well as at schoolwide data analysis and Student Intervention Team (SIT) meetings.
 2. Although there has been little recent districtwide formal professional development training about data collection and analysis, elementary teachers have received AIMSWeb training, and they reported that the principal provides them with "tons" of data, including "information on student achievement and emotional and academic issues."

3. Interviews and a review of the elementary school's improvement plan and assessment calendar showed that AIMSweb student data is collected three times each year (fall, winter, and spring) in ELA and math K-6 and used to inform grouping decisions, tiered instruction, material purchase and use, and program planning. Interviewees acknowledged, however, that because it is not administered more frequently (ESE guidelines recommend that benchmark assessments be given 4-8 times per year) and is not aligned with the 2011 Massachusetts Curriculum Frameworks, AIMSweb is inadequate as a progress monitor and imprecise as a benchmark assessment.
4. Interviewees said that, with the exception of high-risk students who are tested more frequently, the elementary school does not have a comprehensive and balanced system of common formative or summative assessments in place with the capacity to produce direct, frequent, and continuous performance data for all students. They acknowledged the limitations this imposes on the elementary school's ability to effectively monitor ongoing student progress, as well to make timely adjustments to classroom instruction or appropriate modifications to the curriculum.

Impact: The absence of a comprehensive and integrated K-12 assessment system compromises the district's ability to make appropriate judgments, decisions, or timely improvements to academic programs, classroom instruction, PD programming, assessment practices, student support services, educator evaluation, and goal, policy, and budget development. Opportunities for the schools to systematically monitor student progress, to measure student growth, and thereby to improve academic achievement are greatly diminished.

Human Resources and Professional Development

8. **The district adopted an educator evaluation system consistent with the new educator evaluation regulations in September 2013 but has not achieved clarity and consistency in the implementation of the new system.**
 - A. A joint committee composed of teachers, administrators, and school committee representatives worked during the 2012-2013 school year and developed a new district evaluation system that was consistent with all key components of the new educator evaluation regulations.
 1. Interviewees indicated, however, that the committee has not continued to meet nor provide oversight or direction in support of implementation.
 2. Interviewees reported that the training hours required by state law (Chapter 131 of the Acts of 2012) for both teachers and administrators in support of the new evaluation system had been provided during the summer and fall of 2013. Principals indicated, however, that the teacher training workshops may not have been provided with fidelity and that additional, ongoing, and targeted training for both educators and evaluators was warranted.

3. Principals said that district expectations and directions relative to their role in the implementation of educator evaluation were unclear and inconsistent. For example, in the absence of a uniform district policy, teachers at the elementary school were expected to submit self assessment, goal setting, and educator plan documents, while at the middle and high school, the then principal collected only goal setting forms from staff.
 4. The district has not acquired or developed a record keeping system by which to track and monitor the many components, stages, and timelines of the new educator evaluation system. Unified protocols or procedures have not been developed to collect, to log, or to store evaluative data and documents. The district does not have a system in place to enable the superintendent or school and district leaders to make accurate and timely assessments of progress in implementing the new educator evaluation system.
 5. Although administrators articulated a renewed commitment to meeting their responsibilities as evaluators, they expressed genuine concern that, given the complexities of the educator evaluation system, the absence of district support, direction, resources, and clear expectations, the number of staff to be supervised, and the current limited number of evaluators in each of the district's schools, the administrative task may not be realistic or achievable.
 6. Although the new educator evaluation regulations (603 CMR 35.07) require that beginning this school year student feedback should be included as a source of evidence in educator evaluations and staff feedback should be used to inform administrator evaluations, principals reported that there are currently no district plans or efforts underway to meet this requirement.
- B.** The review team reviewed the personnel folders of 26 faculty members selected randomly from across the district, as well as those of all current principals and district administrators. The team did not find evidence that Evaluations, either formative or summative, had been written for any of the district's educators since the adoption of the new educator evaluation system in September 2013. Further, reviewers did not find evidence that evaluations had been produced for any staff since the 2011-2012 school year and in many cases it appeared that it has been 10 years and beyond since professional staff have received performance evaluations.
1. Both teachers and administrators acknowledged that in the past the supervision and evaluation of educators had not been viewed as a district priority.
 2. School principals and district administrators confirmed that, with the possible exception of some teachers without professional status, educator evaluations have not been written and, consequently, that the district had not met the requirements of the new educator evaluation regulations.
 3. Reviewers found little evidence that administrators were held responsible for meeting their responsibilities within the new educator evaluation system. The school committee had not

provided the superintendent, now in his second year as an interim, with a performance review, and indicated they had no plans to do so. The elementary principal and the new middle and high school principal stated that they are trying to improve communication and coordination of evaluative policies and procedures between their schools.

Impact: The new educator evaluation system has the potential to significantly enhance the professional competencies and overall effectiveness of teachers and administrators and to produce greatly enhanced academic opportunities and outcomes for students. However, the potential impact of the system as a lever for change is limited because the district has not prioritized its introduction and is challenged to provide the resources, support, and energetic direction required to ensure its successful implementation.

Student Support

9. Tiered instruction is uneven across the district and is hampered by a number of challenges.

- A.** An effective system of tiered support requires Tier 1 (core instruction) that is high-quality and informed by ongoing data about students' needs. Students needing additional support are then identified and provided with specific programs and services. The support they receive at Tiers 2 and 3 require additional resources.
- B.** Tiered instruction is in place only at the elementary level.
 - 1. The principal and the teachers in the elementary school review multiple sources of data. They cited Aims Web, Columbia, Foundations, Phonological Awareness, Go Math, Might Do, and Key Math as sources of student achievement information, and stated that data teams meet monthly.
 - a. These efforts depend upon the principal's efforts to manually collect, assemble, and display data; there is currently not an established, coordinated system for this purpose (see Assessment finding above).
 - 2. At the middle and high school, the potential for a system of tiered instruction for high-risk students is currently limited since there is little student formative assessment data with which to determine the specific supports that students might need. Middle and high school teachers rely on summative assessments such as MCAS, ACCESS for ELLs, and results of PSAT, SAT and AP tests as sources of student achievement information.
 - a. Students are scheduled into a daily enrichment period. Most students rotate through this additional period for their four core curriculum areas, although math and ELA are prioritized for those students requiring additional support.
- B.** Options for implementing additional support systems are limited.

1. Teachers reported that technology tools are inconsistent and unreliable, so they cannot rely on technological applications for support.
2. Teachers in the middle and high school identified an absence of resources as an impediment to improving student support.

Impact: Limited available data about student needs, unreliable technology, and limited resources make it a challenge to identify students' individual needs and then to address them with additional supports. With the current limitations, the district's ability to improve the achievement of its most challenged students is compromised.

Financial and Asset Management

10. Resource allocation in the Lee Public Schools is not based upon a thorough consideration of student achievement data and program need.

- A.** The principal parties involved in the development of the district budget agreed that the process weighs financial resources very heavily and pays less attention to a systematic assessment of educational need.
 1. While acknowledging their collegial relationship, the town administrator and the school superintendent agreed that budget development is firmly rooted in a consideration of the town revenue, with relatively little attention paid to educational programming and student achievement.
 - a. In separate interviews, the town administrator, the business coordinator, and the superintendent agreed that there is a great deal of open communication between the town and the school department about the budget.
 - b. The parties also agreed that each year the town administrator and the superintendent meet in order to agree on a growth percentage for the budget.
 - i. The town administrator stated that budget parameters are set based upon town revenue projections.
 - ii. The superintendent expressed the belief that most budget development takes place "downtown" and is based upon the town administrator's revenue projections.
 - c. Once the initial budget levels are set, each town department has an opportunity to present its capital and improvement needs to the town's finance committee.
- B.** Principals do not develop annual budget proposals that address the student achievement and programs needs of their schools.

1. The middle and high school does not have a school improvement plan and the elementary plan does not address budgetary needs.
 2. Interviews with the superintendent, the business coordinator, and the principals indicated that there is not a systematic, data-driven process used to assess educational and program needs in the schools.
 3. The parties involved in the development of the district budget agreed that the superintendent and the principals discuss the schools, and that they establish affordable priorities on a consensus basis.
- C. Town officials and school leaders expressed concern that the declining enrollment in the district challenges the establishment of comprehensive models of budget planning.
1. Between 2010 and 2014 overall student enrollment decreased by 14.2 percent.
 2. When asked about budget forecasting, the town administrator told the team that it is becoming increasingly difficult for the school department to justify increased expenses to the town meeting as enrollment declines.
 - a. The town administrator stated that in the face of declining enrollment, contractually governed fixed personnel costs in the budget challenge the funding of school department requests.
 - b. The school business coordinator and school committee members confirmed that the school department values faculty stability and low class size.
 3. In describing the budget process in the face of declining enrollment, the superintendent described the absence of connection between the budget and educational need, noting that it was made very clear to him how much the budget could be and that was not necessarily based on input. He added: "Tax money available drives the budget."

Impact: Without a needs assessment based on a thorough consideration of student data, school leaders cannot come to a full understanding of the needs of their students and of any challenges in programs, materials, or facilities. Without this understanding, leaders do not have sufficient data to present to the wider community a reasoned and comprehensive picture of the district's financial needs.

Lee Public Schools District Review Recommendations

Leadership and Governance

1. The district should develop a DIP and align other planning documents with it.

- A.** The district should develop a District Improvement Plan (DIP).
 - 1. Under the leadership of the superintendent, a working group with wide representation should analyze student performance and other data, including demographics, and develop a DIP.
 - 2. DIP goals should be SMART (Specific and Strategic; Measureable; Action Oriented; Rigorous, Realistic, and Results Focused; and Timed and Tracked.)
- B.** The DIP should include the district's mission or vision, goals, and priorities for action.
 - 1. The DIP should draw from the district's strategic plan as appropriate.
- C.** The DIP's performance goals for students should drive the development, implementation, and modification of the district's educational programs.
 - 1. School Improvement Plans (SIPs) should be created in alignment with the DIP and based upon an analysis of student achievement data.
 - a. Principals should provide the superintendent, school committee, and staff with regular updates on progress toward SIP goals.
 - b. The principal should use the DIP to inform self-assessment and goal setting when creating the educator plan, and progress toward educator plan goals should be used as evidence during implementation.
 - 2. Professional development should be designed to support DIP initiatives and goals.
 - 3. The development of a comprehensive assessment system and of DDMs should be included in the DIP.
- D.** The DIP should be used as a tool for continuous improvement.
 - 1. The superintendent should periodically report to the school committee, staff, families, and community on progress toward achieving DIP goals.
 - 2. The district should establish procedures to review the DIP annually. Strategic activities and benchmarks should be adjusted when necessary to meet current conditions.

3. The superintendent and school committee should consider aligning some goals in the superintendent's educator plan (as part of the district's educator evaluation system) with DIP goals.

Recommended resources:

- ESE's *District Standards and Indicators* (<http://www.doe.mass.edu/apa/review/district/StandardsIndicators.pdf>) identify the characteristics of effective districts in supporting and sustaining school improvement.
- The *District Self-Assessment* (<http://www.doe.mass.edu/apa/review/district/district-self-assessment.pdf>) frames the District Standards and Indicators, along with key questions, in a rubric for conducting a scan of current practice, identifying areas of strength and highlighting areas requiring greater focus.
- A resource for developing the DIP is ESE's *Planning for Success* tools (<http://www.doe.mass.edu/research/success/>). These tools support the improvement planning process by spotlighting practices, characteristics, and behaviors that support effective planning and implementation and meet existing state requirements for improvement planning.
- *District Accelerated Improvement Planning - Guiding Principles for Effective Benchmarks* (<http://www.doe.mass.edu/apa/sss/turnaround/level4/AIP-GuidingPrinciples.pdf>) provides information about different types of benchmarks to guide and measure district improvement efforts.
- The *Massachusetts Definition of College and Career Readiness* (<http://www.mass.edu/library/documents/2013College&CareerReadinessDefinition.pdf>) is a set of learning competencies, intellectual capacities and experiences essential for all students to become lifelong learners; positive contributors to their families, workplaces and communities; and successfully engaged citizens of a global 21st century. This could be a helpful resource as the district articulates its vision and goals.
- *Massachusetts Transfer Goals* (<http://www.doe.mass.edu/candi/model/MATransferGoals.pdf>) are long range goals that students should work toward over the course of their PK-12 academic experience. They were written to provide an explicit connection between the standards-based Model Curriculum Units and Massachusetts' definition of College and Career Readiness. They are not recommended for use as a checklist, evaluation tool, or as an assessment tool, but they could be a helpful resource for the district as it articulates a vision and engages in long-term planning.

Benefits: A broad effort to develop and communicate a District Improvement Plan will provide the district with the information that it needs to make informed decisions about its future. Formulating integrated district and school plans marked by clear objectives, benchmarks, and deadlines will establish an accountability structure in the district that will serve as a road map to success in accomplishing the district's short- and long-term goals. Planning for improvement will provide focus to the district's work in improving teacher effectiveness and raising student achievement.

Curriculum and Instruction

- 2. The district should identify and articulate a district instructional model, communicate this to the entire educational community, and support teachers in its implementation.**
 - A.** The district should convene a representative group of teachers and administrators to define the characteristics of high-quality instruction.
 1. Key instructional practices should be prioritized as the district's non-negotiables.
 2. These should include practices that appropriately challenge students to think deeply and to articulate and elaborate on their ideas.
 - B.** Once a model of instructional practice is identified and defined, district administrators should develop a plan for sharing instructional expectations with staff.
 1. Using department meetings, faculty meetings, or professional development days, the district is encouraged to discuss ideas and strategies from the instructional model.
 2. Administrators are encouraged to conduct non-evaluative walkthroughs to generalize and share feedback about trends observed, and to discuss improvement strategies with teachers.
 - C.** Teachers should be provided with appropriate guidance and feedback as they implement the model.
 1. Professional development should focus on elements of the instructional model.
 2. Principals, as instructional leaders, should ensure that teachers have the information and support necessary to meet the district's expectations for instruction.
 3. Teachers should receive frequent, instructive feedback that helps them to continually improve their instruction.

Recommended resources:

- ESE's *Learning Walkthrough Implementation Guide* (<http://www.doe.mass.edu/apa/dart/walk/ImplementationGuide.pdf>) is a resource to support instructional leaders in establishing a *Learning Walkthrough* process in a school or district. It is designed to provide guidance to those working in an established culture of collaboration as well as those who are just beginning to observe classrooms and discuss teaching and learning in a focused and actionable manner.

Appendix 4, *Characteristics of Standards-Based Teaching and Learning: Continuum of Practice* (<http://www.doe.mass.edu/apa/dart/walk/04.0.pdf>) is a framework that provides a common language or reference point for looking at teaching and learning.

- The March 2014 ESE Educator Evaluation e-Newsletter (<http://www.doe.mass.edu/eeval/communications/newsletter/2014-03.pdf>) includes a section called *Implementation Spotlight: Strategies for Focusing Observations and Providing Consistent, Constructive Feedback*.

Benefits from implementing this recommendation will include:

- Teachers who design instructional activities that promote student engagement in the learning process;
- Students actively involved in their learning; and
- Administrators who expect to observe productive learning strategies and who can provide effective feedback to assist teachers in successfully implementing such strategies.

3. The district should develop a multi-year plan for the development, review, implementation, and monitoring of curriculum. This process should be collaborative and include the resources necessary to support this work including dedicated time and updated instructional resources.

- A.** The system should be based on valid research and analysis of state and district common assessment data, including DDMs, and should involve professional staff including teachers and special educators.
1. The plan should provide a timeline for when K-12 curricula in each discipline will be regularly reviewed and updated, identify participants, and dedicate time (within and among schools) for this ongoing work.
 2. It is recommended that subject areas be prioritized in the review cycle to ensure responsive and timely review and revision based on data analysis and state revisions.
 3. Curriculum leaders should identify and communicate the elements that must be included in curriculum. (The resources below can inform this work.)

Recommended resources:

- ESE's *Common Core State Standards Initiative* web page (<http://www.doe.mass.edu/candi/commoncore/>) includes links to several resources designed to support the transition to the 2011 Massachusetts Curriculum Frameworks, which incorporate the Common Core.
- *Creating Curriculum Units at the Local Level* (http://www.doe.mass.edu/candi/model/mcu_guide.pdf) is a guidance document that can serve as a resource for professional study groups, as a reference for

anyone wanting to engage in curriculum development, or simply as a way to gain a better understanding of the process used to develop Massachusetts' Model Curriculum Units.

- *Creating Model Curriculum Units* (<http://www.youtube.com/playlist?list=PLTuqmiQ9ssquWrLjKc9h5h2cSpDVZqe6t>) is a series of videos that captures the collaboration and deep thinking by curriculum design teams over the course of a full year as they worked to develop Massachusetts' Model Curriculum Units. The series includes videos about developing essential questions, establishing goals, creating embedded performance assessments, designing lesson plans, selecting high-quality materials, and evaluating the curriculum unit.
- *Model Curriculum Units* (http://www.youtube.com/playlist?list=PLTuqmiQ9ssqvX_Yjra4nBfqQPwc4auUBu) is a video series that shows examples of the implementation of Massachusetts' Model Curriculum Units.
- *The Model Curriculum Unit and Lesson Plan Template* (<http://www.doe.mass.edu/candi/model/MCUtemplate.pdf>) includes Understanding by Design elements. It could be useful for districts' and schools' curriculum development and revision.
- ESE's *Quality Review Rubrics* (<http://www.doe.mass.edu/candi/model/rubrics/>) can support the analysis and improvement of curriculum units.
- *Curriculum Mapping: Raising the Rigor of Teaching and Learning* (<http://www.doe.mass.edu/Candi/model/maps/CurriculumMaps.pdf>) is a presentation that provides definitions of curriculum mapping, examples of model maps, and descriptions of curriculum mapping processes.
- Sample curriculum maps (<http://www.doe.mass.edu/candi/model/maps/default.html>) were designed to assist schools and districts with making sense of students' learning experiences over time, ensuring a viable and guaranteed curriculum, establishing learning targets, and aligning curriculum to ensure a consistent implementation of the MA Frameworks.

Benefits from implementing this recommendation will include a guaranteed, viable and continuously improving curriculum that meets students' diverse learning needs. Teachers will be able to make use of documented, standards-based, aligned, and cohesive curriculum materials that are based on current frameworks and are horizontally and vertically aligned. Administrators observing classrooms will have clear expectations for what is to be taught and how it is to be taught.

4. The district should establish, based on the needs of its students, a complete ELA program.

- A. The district should convene a representative committee to determine for the district the elements of a fully functioning elementary language arts program.
- B. The committee should assess which elements of an elementary language arts program are currently in place at the elementary school and which remain to be included.

1. The committee should develop a realistic timeline for the establishment of a complete elementary language arts program.
- C. The committee should investigate several published ELA programs to determine the consistent components.
- D. The committee should decide, based on the needs of its students, on the most effective way to proceed to address the school's need for a complete language arts program.

Benefits from implementing this recommendation include:

- An assessment of the language arts program in place at the elementary school
- The determination of the essential elements of a complete elementary language arts program
- A decision about whether to adopt a published program or to continue to build the school's own program

Assessment

5. **The district should create a coordinated K-12 data system with the capacity to effectively monitor student progress, improve achievement, and inform all aspects of school and district decision making and policy development.**
 - A. The district should create a districtwide data team of representative teachers and administrators, K-12, to oversee the collection, analysis, and dissemination of multiple sources of data.
 1. The district should prioritize the work of the district data team and provide it with the resources and supports necessary to sustain its efforts.
 2. The district should consider establishing satellite data teams in each school, which would coordinate with the district team and be responsible for the collection, dissemination, and analysis of student assessment data in their respective grade levels or subject areas.
 3. The data teams should oversee the development of a comprehensive, coordinated, and balanced system of common formative, summative, and benchmark student assessments, both standardized and locally developed. This unified assessment system should give educators the ability to continuously generate, analyze, and communicate student performance data, monitor progress, inform needed interventions, accurately measure the academic achievement of every student K-12, and properly inform the data component of the new educator evaluation system.

4. The data system should provide professional staff with convenient, real time access to all student performance data, as well as to other relevant academic and demographic data, as appropriate. 6. All staff should receive targeted and sustained professional development training in the construction of valid and reliable student assessments, including DDMs. Ongoing training in the collection, analysis, and use of student performance data should be provided for staff in each school, grade level, and content area.
5. District and school leaders should systematically incorporate student assessment results and other pertinent data into all aspects of policy, prioritization, and decision making, including budget development, district and school improvement plans, and the evaluation of educational programs and services.

Recommended resources:

- ESE's *Assessment Literacy Self-Assessment and Gap Analysis Tool* (<http://www.doe.mass.edu/eval/ddm/webinar/PartI-GapAnalysis.pdf>) is intended to support districts in understanding where their educators fit overall on a continuum of assessment literacy. After determining where the district as a whole generally falls on the continuum, districts can determine potential next steps.
- ESE's *District Data Team Toolkit* (<http://www.doe.mass.edu/apa/ucd/ddtt/toolkit.pdf>) is a set of resources to help a district establish, grow, and maintain a culture of inquiry and data use through a District Data Team.
- The *Edwin Analytics* web page (<http://www.doe.mass.edu/edwin/analytics/>) includes links to a Getting Started Guide, as well as a video tutorial series.
- *District-Determined Measures* (<http://www.youtube.com/playlist?list=PLTuqmiQ9ssquEalxpfpzD6qG9zxvPWl0c>) is a series of videos featuring different aspects of the development and use of District-Determined Measures (DDMs).

Benefits: Implementing this recommendation will promote the establishment and growth of a culture in which data is used strategically to properly inform decisions affecting teaching and learning. Additionally, it will facilitate and support ongoing improvements to educational programs and services and ultimately will enhance the academic achievement of all students.

Human Resources and Professional Development

- 6. The district should make the full and faithful implementation of the new educator evaluation system a priority. The district should address inconsistencies in policies, practices, and procedures that continue to exist and provide the leadership, resources, and infrastructure needed to effectively support successful implementation, including the development of a system with the capacity to support the new educator evaluation system.**
 - A.** The district should reconvene the joint task force that created the district's new educator evaluation system to serve as a standing committee to monitor the overall implementation of the new educator evaluation system, to identify problems proactively, and to collaboratively develop appropriate and timely solutions.
 - B.** The district should develop or acquire an effective record keeping system by which it can efficiently track and monitor progress in the implementation of the numerous components and timelines required by the new educator evaluation system. Consistent procedures and protocols should be developed to ensure that all evaluative documents are submitted, logged, and stored uniformly. The system should enable the superintendent, principals, and other evaluators to have convenient, real time access to all appropriate evaluative documentation and data.
 - C.** Provisions for additional, ongoing, targeted training for both evaluators and educators should be made to support and promote the new educator evaluation system and to ensure that expectations, understandings, roles, and responsibilities for both staff and administration are consistently and appropriately met.
 - D.** Serious consideration should be given to delegating evaluative responsibilities to additional members of the professional staff at both the middle and high school and elementary school.
 - E.** The superintendent should clearly articulate his expectation that the new educator evaluation system is a central district priority and take appropriate steps to ensure that it is implemented with fidelity. This expectation should be incorporated and subsequently monitored as a specific goal within the improvement plans of the district and individual schools, as well as in the professional goals of all administrators and principals.
 - F.** All district evaluators should be held accountable for producing high-quality staff evaluations that are timely, instructive, and fully aligned with the new state regulations. In addition, all supervisors, including the superintendent and principals, should themselves be evaluated in part based on the degree to which they meet their specific responsibilities as described in those regulations.

Recommended resources:

The district is encouraged to contact Ron Noble in ESE's Center for Educator Effectiveness at (781)338-3243 for guidance in making full and faithful implementation of the new educator evaluation system a priority.

ESE's *Student Impact Rating* web page (<http://www.doe.mass.edu/edeval/sir/>) provides a wealth of information, implementation resources, and other materials to support the development and use of DDMs and the determination of Student Impact Ratings.

Rating Educator Performance: The Summative Performance Rating (www.doe.mass.edu/edeval/resources/implementation/RatingEdPerformance.pdf) is a guide to assist educators and evaluators in the determination of Summative Performance Ratings.

Rating Educator Impact: The Student Impact Rating (www.doe.mass.edu/edeval/ddm/EducatorImpact.pdf) is a guide to assist educators and evaluators in the determination of Student Impact Ratings.

Quick Reference Guide: Student and Staff Feedback (<http://www.doe.mass.edu/edeval/resources/QRG-Feedback.pdf>) includes an overview, resource links, and FAQ related to student and staff feedback.

Benefits: The new educator evaluation system is designed to provide educators with meaningful feedback and the continuous support needed to improve classroom instruction, to enhance professional competencies, and to promote student academic achievement. If the district commits itself to the full and faithful implementation of the new educator evaluation system, providing the prioritized attention, resources, and support it requires, then continuous and comprehensive improvements in learning opportunities and academic outcomes for all students can be expected.

Student Support

7. The district should continue with its plan to develop, with teacher input, a Response To Intervention (RTI) system at the Middle and High school to support all students.

- A.** Using the RTI system at the elementary school and the Massachusetts Tiered System of Support as models, the Middle and High School should continue with its plan to design its own system of tiered support. It need not mirror either system; however, building on available resources may be helpful.

Recommended resource:

- The Massachusetts Tiered System of Support (MTSS) (<http://www.doe.mass.edu/mtss/>) is a blueprint for school improvement that focuses on systems, structures and supports across the district, school, and classroom to meet the academic and non-academic needs of all students.

MTSS Self-Assessment Overview (<http://www.doe.mass.edu/mtss/sa/>) includes links to the MTSS Self-Assessment tool and How to Complete the MTSS Self-Assessment.

Benefits from implementing this recommendation include improved learning opportunities for students as well as improvement in overall student achievement.

Financial and Asset Management

8. The district should use the District and School Improvement Plans as its primary guides in developing a fiscal year budget and in determining the subsequent allocation and reallocation of its resources in order to have a positive impact on student achievement.

- A.** The superintendent should begin the process by encouraging the principals to develop their school achievement plans with the focus on student academic improvement.
- B.** In addition to meeting as a team, the superintendent should meet individually with the principals to conduct in-depth discussions of the priority concerns and solutions identified in each School Improvement Plan.
 - 1. Individual principals should have the opportunity to describe the academic challenges in the schools and their specific suggestions to improve student achievement.
 - 2. This would provide the superintendent with detailed information to assess each school's needs and to prioritize and allocate resources to meet those needs.

Benefits from implementing this recommendation include the ability to directly link budget initiatives to district and school achievement plans. This data will then allow district administrators to describe students' needs in the schools and their specific suggestions for improved student achievement.

Recommended resource:

- The Rennie Center's *Smart School Budgeting* (<http://www.renniecenter.org/research/SmartSchoolBudgeting.pdf>) is a summary of existing resources on school finance, budgeting, and reallocation.

Appendix A: Review Team, Activities, Schedule, Site Visit

Review Team Members

The review was conducted from November 17-21, 2014, by the following team of independent ESE consultants.

1. Dr. Thomas G. Pandiscio, leadership and governance, financial and asset management
2. Patricia M. Williams, curriculum and instruction, *review team coordinator*
3. Dr. Frank Sambuceti, assessment and educator evaluation
4. Dr. John Roper, student support and professional development

District Review Activities

The following activities were conducted during the review:

The team conducted interviews with the following financial personnel: business coordinator and assistant business coordinator.

The team conducted interviews with the following members of the school committee: school committee chair and three members.

The review team conducted interviews with the following representatives of the teachers' association: president, vice president, and secretary.

The team conducted interviews/focus groups with the following central office administrators: interim superintendent, special education director, and business coordinator.

The team visited the following schools: Lee Elementary School (PK-6) and the Lee Middle and High School (grades 7-12).

During school visits, the team conducted interviews with 2 principals and focus groups with 4 elementary school teachers and 9 middle and high school teachers.

The team observed 29 classes in the district: 17 at the middle and high school, 12 at the elementary school.

The review team analyzed multiple data sets and reviewed numerous documents before and during the site visit, including:

- Student and school performance data, including achievement and growth, enrollment, graduation, dropout, retention, suspension, and attendance rates.
- Data on the district's staffing and finances.

- Published educational reports on the district by ESE, the New England Association of Schools and Colleges (NEASC), and the former Office of Educational Quality and Accountability (EQA).
- District documents such as district and school improvement plans, school committee policies, curriculum documents, summaries of student assessments, job descriptions, collective bargaining agreements, evaluation tools for staff, handbooks, school schedules, and the district's end-of-year financial reports.
- All completed program and administrator evaluations, and a random selection of completed teacher evaluations.

Site Visit Schedule

Monday 11/17/2014	Tuesday 11/18/2014	Wednesday 11/19/2014	Thursday 11/20/2014
Orientation with district leaders and principals; interviews with district staff and principals; review of personnel files; interview with teachers' association.	Interviews with district staff and principals; review of personnel files; student focus group; teacher focus groups; parent focus group; and visits to Lee Middle and High School for classroom observations.	Interviews with town personnel; interviews with school leaders; interviews with school committee members; visits to Lee Elementary School and Lee Middle and High School for classroom observations.	Interviews with school leaders; district review team meeting; visits to Lee Elementary School and Lee Middle and High School for classroom observations; emerging themes meeting with district leaders and principals.

Appendix B: Enrollment, Performance, Expenditures

**Table B1a: Lee Public Schools
2013-2014 Student Enrollment by Race/Ethnicity**

Student Group	District	Percent of Total	State	Percent of Total
African-American	3	0.4%	82990	8.7%
Asian	20	2.8%	58455	6.1%
Hispanic	50	6.9%	162647	17.0%
Native American	1	0.1%	2209	0.2%
White	627	87.1%	620628	64.9%
Native Hawaiian	--	--	1007	0.1%
Multi-Race, Non-Hispanic	19	2.6%	27803	2.9%
All Students	720	100.0%	955739	100.0%

Note: As of October 1, 2013

**Table B1b: Lee Public Schools
2013-2014 Student Enrollment by High Needs Populations**

Student Groups	District			State		
	N	Percent of High Needs	Percent of District	N	Percent of High Needs	Percent of State
Students w/ disabilities	82	26.5%	11.4%	164336	36.0%	17.2%
Low Income	274	88.4%	38.1%	365885	80.1%	38.3%
ELLs and Former ELLs	16	5.2%	2.2%	75947	16.6%	7.9%
All high needs students	310	100.0%	43.1%	456639	100.0%	47.8%

Notes: As of October 1, 2013. District and state numbers and percentages for students with disabilities and high needs students are calculated including students in out-of-district placements. Total district enrollment including students in out-of-district placement is 722; total state enrollment including students in out-of-district placement is 965,602.

**Table B2a: Lee Public Schools
English Language Arts Performance, 2011-2014**

Grade and Measure		Number Included (2014)	Spring MCAS Year					Gains and Declines	
			2011	2012	2013	2014	State 2014	4-Year Trend	2 Year Trend
3	CPI	47	81	70.6	84.6	78.2	82.6	-2.8	-6.4
	P+	47	44.0%	39.0%	54.0%	45.0%	57.0%	1.0%	-9.0%
4	CPI	49	80.1	83.8	77.2	81.1	79.1	1	3.9
	P+	49	45.0%	57.0%	46.0%	55.0%	54.0%	10.0%	9.0%
	SGP	49	63	69	67	46	49	-17	-21
5	CPI	56	91.7	83	84.1	82.1	84.5	-9.6	-2
	P+	56	69.0%	59.0%	62.0%	55.0%	64.0%	-14.0%	-7.0%
	SGP	54	50	41.5	51	66	50	16	15
6	CPI	47	89.7	96.4	91.1	83.5	85.8	-6.2	-7.6
	P+	47	74.0%	86.0%	82.0%	55.0%	68.0%	-19.0%	-27.0%
	SGP	40	52.5	55	70.5	32.5	50	-20	-38
7	CPI	51	86.2	85.4	91.1	88.2	88.3	2	-2.9
	P+	51	58.0%	66.0%	71.0%	73.0%	72.0%	15.0%	2.0%
	SGP	46	42.5	30	35.5	36.5	50	-6	1
8	CPI	49	90.9	86	87.1	92.3	90.2	1.4	5.2
	P+	49	78.0%	64.0%	69.0%	82.0%	79.0%	4.0%	13.0%
	SGP	45	27	27	29	37	50	10	8
10	CPI	65	94.4	96.8	96.8	95	96	0.6	-1.8
	P+	65	83.0%	91.0%	91.0%	88.0%	90.0%	5.0%	-3.0%
	SGP	58	81	64	54	69	50	-12	15
All	CPI	364	88.3	86.5	87.2	86.2	86.7	-2.1	-1
	P+	364	66.0%	67.0%	67.0%	66.0%	69.0%	0.0%	-1.0%
	SGP	292	49	46	51	47.5	50	-1.5	-3.5

Notes: The number of students included in CPI and percent *Proficient* or *Advanced* (P+) calculations may differ from the number of students included in median SGP calculations. A median SGP is not calculated for students in grade 3 because they are participating in MCAS tests for the first time.

**Table B2b: Lee Public Schools
Mathematics Performance, 2011-2014**

Grade and Measure		Number Included (2014)	Spring MCAS Year					Gains and Declines	
			2011	2012	2013	2014	State 2014	4-Year Trend	2 Year Trend
3	CPI	47	78.6	70.2	88.9	79.3	85.1	0.7	-9.6
	P+	47	49.0%	47.0%	73.0%	53.0%	68.0%	4.0%	-20.0%
4	CPI	49	72.1	76.4	75	84.7	79.6	12.6	9.7
	P+	49	37.0%	46.0%	45.0%	65.0%	52.0%	28.0%	20.0%
	SGP	49	39	69	62.5	69	50	30	6.5
5	CPI	56	87.5	84.1	88.9	87.5	80.4	0	-1.4
	P+	56	69.0%	68.0%	67.0%	73.0%	61.0%	4.0%	6.0%
	SGP	55	64	65	86	79	50	15	-7
6	CPI	46	77.6	91.1	91.5	81.5	80.2	3.9	-10
	P+	46	50.0%	74.0%	80.0%	65.0%	60.0%	15.0%	-15.0%
	SGP	39	64.5	62	66.5	39	50	-25.5	-27.5
7	CPI	52	67.3	66.9	69.3	72.6	72.5	5.3	3.3
	P+	52	37.0%	31.0%	46.0%	48.0%	50.0%	11.0%	2.0%
	SGP	46	51	35	22	43	50	-8	21
8	CPI	50	70.1	66.5	72.4	78	74.7	7.9	5.6
	P+	50	46.0%	42.0%	50.0%	50.0%	52.0%	4.0%	0.0%
	SGP	46	20	41	53.5	47	50	27	-6.5
10	CPI	63	86.7	89.3	96.4	90.1	90	3.4	-6.3
	P+	63	74.0%	77.0%	89.0%	76.0%	79.0%	2.0%	-13.0%
	SGP	56	69	63	60	67	50	-2	7
All	CPI	363	77.1	77.4	82.7	82.3	80.3	5.2	-0.4
	P+	363	52.0%	55.0%	63.0%	62.0%	60.0%	10.0%	-1.0%
	SGP	291	53	56	62	63	50	10	1

Notes: The number of students included in CPI and percent *Proficient* or *Advanced* (P+) calculations may differ from the number of students included in median SGP calculations. A median SGP is not calculated for students in grade 3 because they are participating in MCAS tests for the first time.

**Table B2c: Lee Public Schools
Science and Technology/Engineering Performance, 2011-2014**

Grade and Measure		Number Included (2014)	Spring MCAS Year					Gains and Declines	
			2011	2012	2013	2014	State 2014	4-Year Trend	2 Year Trend
5	CPI	56	82.1	82.4	73.6	76.8	79	-5.3	3.2
	P+	56	52.0%	61.0%	42.0%	46.0%	53.0%	-6.0%	4.0%
8	CPI	50	63.1	60.4	56.3	71.5	72.4	8.4	15.2
	P+	50	20.0%	22.0%	18.0%	42.0%	42.0%	22.0%	24.0%
10	CPI	57	90.4	91	90.4	82	87.9	-8.4	-8.4
	P+	57	81.0%	76.0%	73.0%	60.0%	71.0%	-21.0%	-13.0%
All	CPI	163	78.8	78.1	71.8	77	79.6	-1.8	5.2
	P+	163	53.0%	53.0%	42.0%	50.0%	55.0%	-3.0%	8.0%

Notes: P+ = percent *Proficient* or *Advanced*. Students participate in STE MCAS tests in grades 5, 8, and 10 only. Median SGPs are not calculated for STE.

Table B3a: Lee Public Schools
English Language Arts (All Grades)
Performance for Selected Subgroups Compared to State, 2011-2014

Group and Measure			Number Included (2014)	Spring MCAS Year				Gains and Declines	
				2011	2012	2013	2014	4 Year Trend	2-Year Trend
High Needs	District	CPI	168	80.5	77.3	77.9	79.2	-1.3	1.3
		P+	168	46.0%	47.0%	48.0%	51.0%	5.0%	3.0%
		SGP	121	52	44.5	50	40	-12	-10
	State	CPI	241069	77	76.5	76.8	77.1	0.1	0.3
		P+	241069	48.0%	48.0%	48.0%	50.0%	2.0%	2.0%
		SGP	183766	46	46	47	47	1	0
Low Income	District	CPI	153	81.7	78	79.2	81.5	-0.2	2.3
		P+	153	50.0%	49.0%	50.0%	56.0%	6.0%	6.0%
		SGP	114	52	44.5	51	40	-12	-11
	State	CPI	189662	77.1	76.7	77.2	77.5	0.4	0.3
		P+	189662	49.0%	50.0%	50.0%	51.0%	2.0%	1.0%
		SGP	145621	46	45	47	47	1	0
Students w/ disabilities	District	CPI	42	67.4	67.8	59.5	52.4	-15	-7.1
		P+	42	15.0%	27.0%	10.0%	7.0%	-8.0%	-3.0%
		SGP	21	44.5	36	0	32	-12.5	32
	State	CPI	90777	68.3	67.3	66.8	66.6	-1.7	-0.2
		P+	90777	30.0%	31.0%	30.0%	31.0%	1.0%	1.0%
		SGP	66688	42	43	43	43	1	0
English language learners or Former ELLs	District	CPI	15	60	62.5	57.7	70	10	12.3
		P+	15	20.0%	42.0%	31.0%	33.0%	13.0%	2.0%
		SGP	12	0	0	0	0	0	0
	State	CPI	47477	66.2	66.2	67.4	67.8	1.6	0.4
		P+	47477	33.0%	34.0%	35.0%	36.0%	3.0%	1.0%
		SGP	32239	50	51	53	54	4	1
All students	District	CPI	364	88.3	86.5	87.2	86.2	-2.1	-1
		P+	364	66.0%	67.0%	67.0%	66.0%	0.0%	-1.0%
		SGP	292	49	46	51	47.5	-1.5	-3.5
	State	CPI	488744	87.2	86.7	86.8	86.7	-0.5	-0.1
		P+	488744	69.0%	69.0%	69.0%	69.0%	0.0%	0.0%
		SGP	390904	50	50	51	50	0	-1

Notes: The number of students included in CPI and percent *Proficient* or *Advanced* (P+) calculations may differ from the number of students included in median SGP calculation. State figures are provided for comparison purposes only and do not represent the standard that a particular group is expected to meet.

Table B3b: Lee Public Schools

Mathematics (All Grades)

Performance for Selected Subgroups Compared to State, 2011-2014

Group and Measure			Number Included (2014)	Spring MCAS Year				Gains and Declines	
				2011	2012	2013	2014	4 Year Trend	2-Year Trend
High Needs	District	CPI	169	65.6	63.4	72.6	72.9	7.3	0.3
		P+	169	33.0%	31.0%	46.0%	44.0%	11.0%	-2.0%
		SGP	123	50.5	48.5	58	61	10.5	3
	State	CPI	241896	67.1	67	68.6	68.4	1.3	-0.2
		P+	241896	37.0%	37.0%	40.0%	40.0%	3.0%	0.0%
		SGP	184937	46	46	46	47	1	1
Low Income	District	CPI	155	66.5	66	73.5	75	8.5	1.5
		P+	155	37.0%	36.0%	50.0%	47.0%	10.0%	-3.0%
		SGP	116	53	54	58	61	8	3
	State	CPI	190183	67.3	67.3	69	68.8	1.5	-0.2
		P+	190183	38.0%	38.0%	41.0%	41.0%	3.0%	0.0%
		SGP	146536	46	45	46	47	1	1
Students w/ disabilities	District	CPI	42	54.3	46.7	52.5	48.8	-5.5	-3.7
		P+	42	4.0%	2.0%	7.0%	12.0%	8.0%	5.0%
		SGP	23	41	24	0	66	25	66
	State	CPI	91181	57.7	56.9	57.4	57.1	-0.6	-0.3
		P+	91181	22.0%	21.0%	22.0%	22.0%	0.0%	0.0%
		SGP	67155	43	43	42	43	0	1
English language learners or Former ELLs	District	CPI	16	0	46.2	65	59.4	59.4	-5.6
		P+	16	0.0%	15.0%	40.0%	19.0%	19.0%	-21.0%
		SGP	12	0	0	0	0	0	0
	State	CPI	47847	62	61.6	63.9	63.8	1.8	-0.1
		P+	47847	32.0%	32.0%	35.0%	36.0%	4.0%	1.0%
		SGP	32607	52	52	53	52	0	-1
All students	District	CPI	363	77.1	77.4	82.7	82.3	5.2	-0.4
		P+	363	52.0%	55.0%	63.0%	62.0%	10.0%	-1.0%
		SGP	291	53	56	62	63	10	1
	State	CPI	490288	79.9	79.9	80.8	80.3	0.4	-0.5
		P+	490288	58.0%	59.0%	61.0%	60.0%	2.0%	-1.0%
		SGP	392953	50	50	51	50	0	-1

Notes: The number of students included in CPI and percent *Proficient* or *Advanced* (P+) calculations may differ from the number of students included in median SGP calculation. State figures are provided for comparison purposes only and do not represent the standard that a particular group is expected to meet.

**Table B3c: Lee Public Schools
Science and Technology/Engineering (All Grades)
Performance for Selected Subgroups Compared to State, 2011-2014**

Group and Measure			Number Included (2014)	Spring MCAS Year				Gains and Declines	
				2011	2012	2013	2014	4 Year Trend	2-Year Trend
High Needs	District	CPI	70	69.6	64.9	62.3	61.4	-8.2	-0.9
		P+	70	30.0%	28.0%	31.0%	24.0%	-6.0%	-7.0%
	State	CPI	100582	63.8	65	66.4	67.3	3.5	0.9
		P+	100582	28.0%	31.0%	31.0%	33.0%	5.0%	2.0%
Low Income	District	CPI	62	73.1	66.3	61.6	64.1	-9	2.5
		P+	62	33.0%	32.0%	33.0%	27.0%	-6.0%	-6.0%
	State	CPI	79199	62.8	64.5	66.1	66.8	4	0.7
		P+	79199	28.0%	31.0%	32.0%	33.0%	5.0%	1.0%
Students w/ disabilities	District	CPI	21	60	51.3	60.7	39.3	-20.7	-21.4
		P+	21	20.0%	5.0%	21.0%	0.0%	-20.0%	-21.0%
	State	CPI	38628	59.2	58.7	59.8	60.1	0.9	0.3
		P+	38628	20.0%	20.0%	20.0%	22.0%	2.0%	2.0%
English language learners or Former ELLs	District	CPI	5	--	--	--	--	--	--
		P+	5	--	--	--	--	--	--
	State	CPI	16871	50.3	51.4	54	54	3.7	0
		P+	16871	15.0%	17.0%	19.0%	18.0%	3.0%	-1.0%
All students	District	CPI	163	78.8	78.1	71.8	77	-1.8	5.2
		P+	163	53.0%	53.0%	42.0%	50.0%	-3.0%	8.0%
	State	CPI	211440	77.6	78.6	79	79.6	2	0.6
		P+	211440	52.0%	54.0%	53.0%	55.0%	3.0%	2.0%

Notes: Median SGPs are not calculated for STE. State figures are provided for comparison purposes only and do not represent the standard that a particular group is expected to meet.

**Table B4: Lee Public Schools
Annual Grade 9-12 Dropout Rates, 2010-2013**

	School Year Ending				Change 2010-2013		Change 2012-2013		State (2013)
	2010	2011	2012	2013	Percentage Points	Percent	Percentage Points	Percent	
All students	3.2	3.2	2.3	1.8	-1.4	-0.44	-0.5	-0.22	2.2

Notes: The annual dropout rate is calculated by dividing the number of students who drop out over a one-year period by the October 1 grade 9–12 enrollment, multiplied by 100. Dropouts are those students who dropped out of school between July 1 and June 30 of a given year and who did not return to school, graduate, or receive a GED by the following October 1. Dropout rates have been rounded; percent change is based on unrounded numbers.

**Table B5a: Lee Public Schools
Four-Year Cohort Graduation Rates, 2010-2013**

Group	Number Included (2013)	School Year Ending				Change 2009-2012		Change 2011-2012		State (2013)
		2010	2011	2012	2013	Percentage Points	Percent Change	Percentage Points	Percent Change	
High needs	35	66.7%	85.7%	77.1%	68.6%	1.9	2.8%	-8.5	-11.0%	74.7%
Low income	31	69.2%	86.8%	76.2%	67.7%	-1.5	-2.2%	-8.5	-11.2%	73.6%
Students w/ disabilities	9	53.3%	87.5%	71.4%	66.7%	13.4	25.1%	-4.7	-6.6%	67.8%
English language learners or Former ELLs	--	--	--	--	--	--	--	--	--	63.5%
All students	84	82.9%	88.2%	86.0%	79.8%	-3.1	-3.7%	-6.2	-7.2%	85.0%

Notes: The four-year cohort graduation rate is calculated by dividing the number of students in a particular cohort who graduate in four years or less by the number of students in the cohort entering their freshman year four years earlier, minus transfers out and plus transfers in. Non-graduates include students still enrolled in high school, students who earned a GED or received a certificate of attainment rather than a diploma, and students who dropped out. Graduation rates have been rounded; percent change is based on unrounded numbers.

**Table B5b: Lee Public Schools
Five-Year Cohort Graduation Rates, 2009-2012**

Group	Number Included (2012)	School Year Ending				Change 2009-2012		Change 2011-2012		State (2012)
		2009	2010	2011	2012	Percentage Points	Percent Change	Percentage Points	Percent Change	
High needs	48	66.0%	66.7%	85.7%	85.4%	19.4	29.4%	-0.3	-0.4%	78.9%
Low income	42	68.8%	69.2%	86.8%	83.3%	14.5	21.1%	-3.5	-4.0%	77.5%
Students w/ disabilities	14	47.4%	53.3%	87.5%	92.9%	45.5	96.0%	5.4	6.2%	73.8%
English language learners or Former ELLs	--	--	--	--	--	--	--	--	--	68.5%
All students	86	78.3%	84.2%	88.2%	90.7%	12.4	15.8%	2.5	2.8%	87.5%

Notes: The five-year cohort graduation rate is calculated by dividing the number of students in a particular cohort who graduate in five years or less by the number of students in the cohort entering their freshman year five years earlier, minus transfers out and plus transfers in. Non-graduates include students still enrolled in high school, students who earned a GED or received a certificate of attainment rather than a diploma, and students who dropped out. Graduation rates have been rounded; percent change is based on unrounded numbers. Graduation rates have been rounded; percent change is based on unrounded numbers.

**Table B6: Lee Public Schools
Attendance Rates, 2011-2014**

Group	School Year Ending				Change 2011-2014		Change 2013-2014		State (2014)
	2011	2012	2013	2014	Percentage Points	Percent Change	Percentage Points	Percent Change	
All students	94.8%	95.1%	95.3%	95.3%	0.5	0.5%	0.0	0.0%	94.9%

Notes: The attendance rate is calculated by dividing the total number of days students attended school by the total number of days students were enrolled in a particular school year. A student's attendance rate is counted toward any district the student attended. In addition, district attendance rates included students who were out placed in public collaborative or private alternative schools/programs at public expense. Attendance rates have been rounded; percent change is based on unrounded numbers.

**Table B7: Lee Public Schools
Suspension Rates, 2010-2013**

Group	School Year Ending				Change 2010-2013		Change 2012-2013		State (2013)
	2010	2011	2012	2013	Percentage Points	Percent Change	Percentage Points	Percent Change	
In-School Suspension Rate	6.4%	4.0%	3.0%	0.3%	-6.1	-95.3%	-2.7	-90.0%	2.2%
Out-of-School Suspension Rate	4.7%	4.9%	5.9%	0.5%	-4.2	-89.4%	-5.4	-91.5%	4.3%

Note: This table reflects information reported by school districts at the end of the school year indicated. Suspension rates have been rounded; percent change is based on unrounded numbers.

Table B8: Lee Public Schools
Expenditures, Chapter 70 State Aid, and Net School Spending Fiscal Years 2012–2014

	FY12		FY13		FY14	
	Estimated	Actual	Estimated	Actual	Estimated	Actual
Expenditures						
From local appropriations for schools:						
By school committee	\$7,688,288	\$7,712,928	\$7,888,171	\$7,975,529	\$8,144,174	\$8,230,414
By municipality	\$4,126,395	\$4,115,614	\$4,249,076	\$4,261,781	\$4,235,414	\$4,284,950
Total from local appropriations	\$11,814,683	\$11,828,542	\$12,137,247	\$12,237,310	\$12,379,588	\$12,515,364
From revolving funds and grants	--	\$1,827,987	--	\$1,807,812	--	\$1,651,742
Total expenditures	--	\$13,656,529	--	\$14,045,122	--	\$14,167,106
Chapter 70 aid to education program						
Chapter 70 state aid*	--	\$1,918,169	--	\$1,947,049	--	\$1,964,149
Required local contribution	--	\$5,431,263	--	\$5,598,309	--	\$5,748,371
Required net school spending**	--	\$7,349,432	--	\$7,545,358	--	\$7,712,520
Actual net school spending	--	\$9,944,965	--	\$10,370,465	--	\$10,746,983
Over/under required (\$)	--	\$2,595,533	--	\$2,825,107	--	\$3,034,463
Over/under required (%)	--	35.3	--	37.4	--	39.3

*Chapter 70 state aid funds are deposited in the local general fund and spent as local appropriations.

**Required net school spending is the total of Chapter 70 aid and required local contribution. Net school spending includes only expenditures from local appropriations, not revolving funds and grants. It includes expenditures for most administration, instruction, operations, and out-of-district tuitions. It does not include transportation, school lunches, debt, or capital.

Sources: FY11, FY12 District End-of-Year Reports, Chapter 70 Program information on ESE website

Data retrieved November 19, 2014 and January 8, 2015

**Table B9: Lee Public Schools
Expenditures Per In-District Pupil
Fiscal Years 2011-2013**

Expenditure Category	2011	2012	2013
Administration	\$557	\$635	\$677
Instructional leadership (district and school)	\$866	\$759	\$829
Teachers	\$5,171	\$5,273	\$5,741
Other teaching services	\$1,487	\$1,446	\$1,580
Professional development	\$285	\$165	\$203
Instructional materials, equipment and technology	\$450	\$397	\$392
Guidance, counseling and testing services	\$450	\$477	\$517
Pupil services	\$1,153	\$1,278	\$1,467
Operations and maintenance	\$1,112	\$1,134	\$1,250
Insurance, retirement and other fixed costs	\$2,727	\$2,976	\$3,272
Total expenditures per in-district pupil	\$14,258	\$14,541	\$15,929

Sources: [Per-pupil expenditure reports on ESE website](#)

Appendix C: Instructional Inventory

Learning Environment	By Grade Span	Evidence		
		None	Partial	Clear & Consistent
		(0)	(1)	(2)
1. Interactions between teacher & students & among students are positive & respectful.	ES	0%	17%	83%
	MS	0%	29%	71%
	HS	10%	30%	60%
	Total #	1	7	21
	Total %	3%	24%	72%
2. Behavioral standards are clearly communicated. Disruptions, if present, are managed effectively & equitably.	ES	0%	8%	92%
	MS	0%	29%	71%
	HS	10%	30%	60%
	Total #	1	6	22
	Total %	3%	21%	75%
3. Classroom procedures are established & maintained to create a safe physical environment & promote smooth transitions among all classroom activities.	ES	0%	17%	83%
	MS	0%	57%	43%
	HS	10%	50%	40%
	Total #	2	13	14
	Total %	7%	45%	48%
4. Lesson reflects rigor & high expectations.	ES	8%	33%	58%
	MS	0%	29%	71%
	HS	30%	40%	30%
	Total #	4	10	15
	Total %	14%	34%	52%
5. Classroom rituals, routines & appropriate interactions create a safe intellectual environment in which students take academic risks & most behaviors that interfere with learning are prevented.	ES	25%	75%	0%
	MS	14%	29%	57%
	HS	10%	60%	30%
	Total #	5	17	7
	Total %	17%	59%	24%
6. Multiple resources are available to meet students' diverse learning needs.	ES	0%	0%	100%
	MS	0%	14%	86%
	HS	10%	10%	80%
	Total #	1	2	26
	Total %	3%	7%	90%
7. The physical arrangement of the classroom ensures a positive learning environment & provides all students with access to learning activities.	ES	17%	42%	42%
	MS	0%	86%	14%
	HS	20%	50%	30%
	Total #	4	16	9
	Total %	14%	55%	31%

Teaching	By Grade Span	Evidence		
		None	Partial	Clear & Consistent
		(0)	(1)	(2)
8. Demonstrates knowledge of subject & content.	ES	42%	0%	58%
	MS	29%	29%	43%
	HS	60%	20%	20%
	Total #	13	4	12
	Total %	45%	14%	41%
9. Communicates clear grade-appropriate learning objectives aligned to state standards. Applicable ELL language objectives are evident.	ES	33%	0%	67%
	MS	29%	29%	43%
	HS	40%	40%	20%
	Total #	10	6	13
	Total %	34%	21%	45%
10. Uses appropriate & varied strategies matched to learning objectives & content.	ES	67%	17%	17%
	MS	71%	29%	0%
	HS	60%	10%	30%
	Total #	19	5	5
	Total %	66%	17%	17%
11. Requires inquiry, exploration, application, analysis, synthesis, &/or evaluation of concepts individually, in pairs or in groups to demonstrate higher-order thinking. (circle observed skills)	ES	42%	17%	42%
	MS	0%	100%	0%
	HS	40%	40%	20%
	Total #	9	13	7
	Total %	31%	45%	24%
12. Uses varied questioning techniques that require/seek thoughtful responses & promote deeper understanding.	ES	33%	17%	50%
	MS	14%	43%	43%
	HS	30%	40%	30%
	Total #	8	9	12
	Total %	28%	31%	41%
13. Implements appropriate & varied strategies that meet students' diverse learning needs.	ES	25%	8%	67%
	MS	29%	14%	57%
	HS	40%	30%	30%
	Total #	9	5	15
	Total %	31%	17%	52%
14. Paces lesson to engage all students & promote understanding.	ES	0%	8%	92%
	MS	0%	57%	43%
	HS	20%	30%	50%
	Total #	2	8	19
	Total %	7%	28%	66%
15. Conducts frequent formative assessments to check for understanding & inform instruction.	ES	0%	33%	67%
	MS	0%	71%	29%
	HS	20%	50%	30%
	Total #	2	14	13
	Total %	7%	48%	45%
16. Makes use of technology to enhance learning.	ES	42%	25%	33%
	MS	43%	43%	14%
	HS	60%	40%	0%
	Total #	14	10	5
	Total %	48%	34%	17%

Learning	By Grade Span	Evidence		
		None	Partial	Clear & Consistent
		(0)	(1)	(2)
17. Students are engaged in productive learning routines.	ES	0%	25%	75%
	MS	0%	57%	43%
	HS	10%	60%	30%
	Total #	1	13	15
	Total %	3%	45%	52%
18. Students are engaged in challenging academic tasks.	ES	17%	33%	50%
	MS	0%	71%	29%
	HS	30%	40%	30%
	Total #	5	13	11
	Total %	17%	45%	38%
19. Students assume responsibility for their own learning.	ES	25%	17%	58%
	MS	0%	57%	43%
	HS	40%	40%	20%
	Total #	7	10	12
	Total %	24%	34%	41%
20. Students articulate their thinking or reasoning verbally or in writing either individually, in pairs or in groups.	ES	25%	33%	42%
	MS	14%	71%	14%
	HS	70%	10%	20%
	Total #	11	10	8
	Total %	38%	34%	28%
21. Students' responses to questions elaborate about content & ideas (not expected for all responses).	ES	33%	33%	33%
	MS	29%	29%	43%
	HS	60%	20%	20%
	Total #	12	8	9
	Total %	41%	28%	31%
22. Students make connections to prior knowledge, real world experiences & other subject matter.	ES	67%	17%	17%
	MS	86%	14%	0%
	HS	80%	20%	0%
	Total #	22	5	2
	Total %	76%	17%	7%
23. Students use technology as a tool for learning &/or understanding.	ES	17%	17%	67%
	MS	29%	29%	43%
	HS	50%	30%	20%
	Total #	9	7	13
	Total %	31%	24%	45%
24. Student work demonstrates high quality & can serve as exemplars.	ES	58%	33%	8%
	MS	43%	57%	0%
	HS	80%	10%	10%
	Total #	18	9	2
	Total %	62%	31%	7%