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February 15, 2023

Davigny Jean-Louis
American Arbitration Association
200 State Street
7th Floor
Boston, MA 02109

Re: Demand for arbitration pursuant to individual employment agreement/Erin McMahon and Saugus School Committee

Dear Ms. Jean-Louis:

Please accept this correspondence as a demand for arbitration under an individual employment agreement between Erin McMahon, Superintendent of School in Saugus, Massachusetts, and the Saugus School Committee.

The demand is made pursuant to Superintendent McMahon's contract, Article 12.1, which provides for arbitration of "any alleged breach of this agreement by either party [which] must be filed within thirty (30) days of the occurrence of the alleged breach." A copy of Superintendent McMahon's contract is enclosed as Ex. 1.

Section 8.8 of Superintendent McMahon's contract requires as follows:

Any criticisms, complaints, and suggestions called to the attention of the Committee shall be promptly and discreetly referred to the Superintendent in writing for study, disposition, or recommendation as appropriate to facilitate the orderly administration of the District and to ensure responsiveness to the public and fairness to the Superintendent.

Any such matter not promptly raised may not be considered in the summative evaluation as the Superintendent may not be aware of same or may not have sufficient time to take remedial action.

On January 17, 2023, the Chair of the Saugus School Committee came to Superintendent McMahon with a broad and vague assertion that there were “concerns,” which he represented as coming from “the community.” To date, the School Committee has failed to provide detail or information about these putative “concerns” and “potential concerns.” To date, the School Committee has asserted that these “concerns” and “potential concerns” relate to the administration of grants, a company that provided professional development, bills and billing of outside consultants, and time – use of days – inside and out of the district.

This arbitration demand is required by Superintendent McMahon’s contract to be submitted to AAA on or before February 16, 2023. The contract states that all disputes will be administered in accordance with the Labor Arbitration rules of the American Arbitration Association.

Superintendent McMahon and I have repeatedly requested the specifics of the allegations, consistent with the provisions of her contract quoted above. I am attaching our initial written request for information and public records concerning this matter, dated January 25, 2023. See, Ex. 2. The Committee replied, through counsel, on February 1, 2023. See, Ex. 3. In other words, the Committee continued to violate the requirements of Section 8.8 of her contract, and also failed to provide a detailed and specific response to the public records request as required by law, M.G.L. c.66, §10. Further, the committee has refused to provide this information, and has refused to identify the complaining parties, first indicating the Chair received complaints from the community and subsequently stating the complaints originated with employees of the Saugus Public Schools.

Despite her repeated requests Superintendent McMahon has not received any copies of any relevant documentation or witness statements, or a written summary of their statements prepared by anyone who received verbal or oral complaints, in order that she may properly respond to any questions raised and resolve issues. Fundamental fairness and due process, as well as Superintendent McMahon’s employment agreement, quoted above, require the prompt provision to her of any and all complaints or concerns such that they may be reviewed and resolved.

Following receipt of the February 1, 2023 letter from Committee counsel refusing to provide documents or specifics, Ms. McMahon was forced to file an appeal of the Committee’s refusal to properly respond to the public records request. On February 9, 2023 counsel for Ms. McMahon filed that appeal with the Supervisor of Public Records (SPR) for the Commonwealth. See attached Appeal to the SPR, dated February 9, 2023, marked as Ex. 4. We do not have a response from the SPR as of the date of this demand for arbitration.

At the January 19, 2023 School Committee meeting, the Chair publicly announced that the committee had accepted Superintendent McMahon’s agreed upon paid administrative leave, that this is a personnel matter, that it is not to be considered disciplinary, that the Committee would handle the matter with appropriate due diligence, confidentiality, and professionalism, and would have no further comment “until the results of the investigation are done.” On February 6, 2023,

counsel for Superintendent McMahon was advised by Committee counsel that the Arrowood, LLP, law firm would conduct an investigation. Once again, no information was provided as to the specifics of the alleged concerns. No information has been provided about, or containing copies of, complaints the committee alleges it had received or about which they had already appointed an independent investigator. Given the Committee's refusal to respond with reasonable relevant information, on February 10, 2023, counsel for Superintendent McMahon wrote directly to Arrowood, LLP requesting basic information on charges or other facts on which the investigation is predicated. See attached correspondence to Arrowood, LLP, dated February 10, 2023, which contained copies of the correspondence referenced above. See, Ex. 5.

In effect, the Committee and its counsel will conduct an "investigation" and decide how much information will be provided to the accused after she is interrogated. Presumably any potential refusal to cooperate and participate in the "investigation" on the grounds that the Committee has chosen not to provide her with contractually and constitutionally required information would be perceived as by the Committee as insubordinate and may be used to support disciplinary action.

For these reasons, Superintendent McMahon regrettably has no choice but to resort to her contractual arbitration remedy. She has exhausted the normal, routine steps commonly utilized to establish communication with her employer about concerns in the workplace. This is not a step she takes lightly. Superintendent McMahon is anxious to resume the duties she is being paid to perform and preserve her professional reputation. Accordingly, she seeks with this filing to ensure the contract is honored by the Committee in its particulars, and in accordance with the broadly recognized rule of law that all contractual promises must be carried out in good faith and with fair dealing.

Please forward a list of arbitrators and a bill for AAA's initial administrative services.

Very truly yours,


Michael J. Long

CC: Erin McMahon
Atty. Sheilah McCarthy
Atty. Howard Greenspan

Exhibit 1

EMPLOYMENT AGREEMENT
BETWEEN
THE SAUGUS SCHOOL COMMITTEE
AND
ERIN MCMAHON

This Employment Agreement (hereinafter referred to as "this AGREEMENT") is made between the Saugus School Committee (hereinafter referred to as "the Committee") and Erin McMahon (hereinafter referred to as "the Superintendent" or "Ms. McMahon"). This AGREEMENT will be effective as of July 1, 2021. For mutual consideration expressed herein, the parties agree as follows:

1. **EMPLOYMENT**: The Committee hereby agrees to employ Erin McMahon as Superintendent of the Saugus Public Schools, and Erin McMahon accepts such employment on the terms and conditions contained in this AGREEMENT.

2. **DURATION**: The Superintendent shall be employed as the Superintendent of the Saugus Public Schools for five (5) years, from July 1, 2021 through June 30, 2026, except as this AGREEMENT may be otherwise extended by mutual agreement or terminated as provided herein. No later than July 1, 2025, the Committee shall notify the Superintendent in writing as to whether or not it desires to continue the Superintendent's employment beyond June 30, 2026. Should the Committee and the Superintendent mutually desire to continue the Superintendent's employment, they will make a good faith effort to complete negotiations for a successor employment agreement on or before October 1, 2025. If they are unable to agree upon a new employment agreement or an extension of this AGREEMENT, then this AGREEMENT will expire, and the Superintendent's employment will end on June 30, 2026.

3. **COMPENSATION**: The Committee shall pay the Superintendent an annual salary of One Hundred Ninety Six Thousand (\$196,000) Dollars effective July 1, 2021 through June 30, 2022. This annual salary rate shall be paid to the Superintendent in accordance with the schedule of salary payments in effect for other certified employees and shall be set by the Committee each year thereafter following the Committee's review of the Superintendent's performance as outlined in Paragraph 8 and after discussion with the Superintendent in Executive Session. The Superintendent's salary shall not be reduced during the life of the agreement or any extension hereof except as part of a general salary revision affecting the salary of every employee of the District.

The Superintendent's Annual Salary will be subject to withholdings for state and federal taxes and other withholdings required by law or authorized by the Superintendent. The Superintendent's salary shall be paid in equal installments in accordance with the procedures governing payment of other professional staff in the Saugus Public Schools.

4. WORK YEAR AND LEAVE BENEFITS:

4.1 Work Year: The work year for the Superintendent is twelve months commencing July 1st of each Contract Year and ending the following June 30th. The Superintendent shall devote her full time, skill, labor and attention to the discharge of duties as Superintendent for the Saugus Public Schools.

4.2 Vacation Leave:

A. Accrual

The Superintendent shall be entitled to twenty-five (25) vacation days per Contract Year earned at the rate of 2.08333 days per month. The Superintendent may borrow against future accrual during the same Contract Year. Any vacation time equal to or in excess of three (3) consecutive business days are subject to advance notice to the Committee Chair and notice of vacation leave will be submitted with a reasonable period of advance notice.

B. Carry Over and Buy Back

A maximum of ten (10) vacation days may be carried over from Contract Year to Contract Year, so that at any one time the maximum number of vacation days which are available shall not exceed thirty-five (35). The Superintendent may buy back up to ten (10) accrued unused vacation days per Contract Year at the Superintendent's per diem rate of pay then in effect provided that the Superintendent gives the Committee timely written notice in accordance with this Section 4.2. So that the Committee may accurately budget for such a buy back, the Superintendent must notify the Committee in writing of the Superintendent's intent to access said buy back and the number of days the Superintendent wishes to have bought back on or before May 31th for a buyback to be made on or before June 30th of the same Contract Year. For the purposes of determining the Superintendent's per diem rate under this AGREEMENT, the Superintendent's Annual Salary shall be divided by 261 days.

4.3 Sick Leave: The Superintendent shall be entitled to sick leave with pay in accordance with the provisions in this Section 4.3. Effective July 1, 2021, the Superintendent will be granted a bank of ten (10) sick leave days. The Superintendent will accrue one and a quarter (1.25) sick leave days per month commencing July 1, 2021. The Superintendent may use accrued sick leave to cover the Superintendent's absences for personal illness or injury. The Superintendent may carry over unused accrued sick leave days into subsequent Contract Years up to a maximum of ninety (90) days.

4.4 Holidays: The Superintendent shall receive the following paid holidays: all state of Massachusetts holidays for which state offices are officially closed, with the addition of the Friday before Labor Day.

4.5 Personal Leave: The Committee may grant the Superintendent up to two (2) personal leave days with pay per Contract Year for important legal or personal business which cannot be conducted outside of the Superintendent's workday or for emergencies. Unused personal leave days shall not carry over into a subsequent Contract Year.

4.6 Bereavement Leave: The Superintendent may take up to five (5) work days as bereavement leave with pay to make funeral arrangement and/or to attend the funeral/memorial service for the Superintendent's spouse, child, father, mother, sibling, mother-in-law, father-in-law, grandparent, grandchild, sister, brother, or other person residing in the Superintendent's household. The Superintendent may take up to two (2) workdays as bereavement leave with pay to attend the funeral/memorial service for the Superintendent's sister-in-law, brother-in-law, nephew or niece.

5. REIMBURSEMENT FOR EXPENSES and NSIP:

5.1 Reimbursement for Expenses: The Committee shall reimburse the Superintendent in accordance with Committee policy and procedure for reasonable and necessary, documented expenses incurred in the performance of the Superintendent's duties upon the presentation by the Superintendent of receipts submitted within 30 calendar days of incurring such expenses, including, but not limited to phone expenses, personal computer, and expenses for conferences approved in advance by the Committee Chair, as well as membership dues for organizations approved in advance by the Committee Chair. Such reimbursement shall not exceed five thousand dollars (\$5,000.00) in the aggregate per Contract Year. The following dues and/or registration fees do not need School Committee prior approval but are subject to the \$5,000.00 aggregate limit per Contract Year:

- MASS annual membership fee
- MASS Leadership Institute program fee
- Joint MASS and MASC Conference registration fee

No reimbursements shall be made in excess of the five thousand dollar (\$5,000.00) limit without the prior written request from the Superintendent and prior written authorization from the Committee after a vote of the Committee at an Open Meeting.

5.2 NSIP: The Committee shall pay the cost for the Superintendent's participation in the MASS New Superintendent Induction Program (NSIP) for the first and second Contract Years; such cost shall not be subject to the \$5,000.00 limit in Section 5.1. The Committee shall pay the cost for participation in NSIP for the first Contract Year up to \$4,900 and for the second Contract Year up to \$4,500.

5.3 The School Committee is aware the Superintendent is pursuing a doctorate. The Superintendent's attendance at program, classes, or activities shall be considered as professional development activities recognized as regular, ongoing activities related to her employment. The Superintendent shall provide to the Committee Chair a projected schedule of classes and activities requiring her physical presence and shall make arrangements with the District staff to

enable direct contact on such days as needed to respond to District emergencies or important matters.

6. **INSURANCE:**

6.1 Group Health Insurance: The Superintendent may elect to obtain group health insurance generally available to employees and their dependents in the Saugus Public Schools on the same terms and conditions as such insurance is generally available to other non-unionized employees in the Saugus Public Schools, and the Superintendent recognizes that the Saugus School Committee and the Town of Saugus may change such terms and conditions and such insurance from time to time. If the Superintendent declines to obtain such health insurance, the Superintendent shall provide proof of health insurance coverage through another source and shall complete any required documentation including the Massachusetts Health Insurance Responsibility Disclosure ("HIRD") form.

6.2 Insurance: At the Committee's expense, the Superintendent shall be provided with such Universal Life Insurance and Accidental Death and Disability Insurance as is then provided to executive group employees in the Committee/Town's insurance budget. The Committee shall provide the Superintendent disability insurance with the same level of contribution and consistent with that provided to executive group employees of the Committee/Town.

7. **DUTIES:** The Superintendent shall have charge of the administration of the Saugus Public Schools consistent with law and Committee policies and directives. The Superintendent shall be the chief executive officer of the School Department and shall employ, assign, direct, evaluate, discipline, and terminate all employees of the Saugus Public Schools consistent with law and Committee policy. The Superintendent shall organize, reorganize, and arrange the administrative and supervisory staff, including instruction and business affairs and shall be responsible for the operation and management of the school department including the utilization of and accounting for funds appropriated for the school department as well as all other funds coming under the control of the school department. The Superintendent shall construct school committee meeting agendas in consultation with and at the direction of the Committee chairperson. The Superintendent shall attend all meetings of the Saugus School Committee, unless excused, and may participate in all school committee deliberations except when matters relating to the Superintendent's own employment and/or this AGREEMENT are under consideration. The Superintendent shall recommend regulations, rules, policies, and procedures deemed necessary for the good order of the school departments, and, in general, perform all duties incident to the office of the Superintendent, as provided by applicable laws and in accordance with the policies and directives of the Committees, as they may be promulgated or modified from time to time.

8. STANDARDS BASED EVALUATION:

8.1 STATE STANDARDS, GOALS & ANNUAL PLAN: The Superintendent shall be evaluated based on Standards and Rubrics adopted by the Board of Education and DESE on a schedule agreed upon by the parties as set out below. The Standards are: Instructional Leadership, Management and Operations, Family & Community Engagement, and Professional Culture. These may change as determined by the Board of Education. The evaluation shall reflect the five step cycle set out in Principles of Effective Administrative Leadership and Descriptors adopted by the Massachusetts Board of Education, 603 CMR 35.00, and any additional standards or goals mutually agreed upon. The Evaluation Instrument and the process of evaluation may be amended, modified or abbreviated by mutual agreement in writing by the Superintendent and the Committee. All evaluations shall be accomplished consistent with the provisions of M.G.L., c. 30A relative to the Open Meeting Law.

8.1 (A) DISTRICT GOALS: In addition to an evaluation using the Principles of Effective Administrative Leadership, the Committee and the Superintendent may also establish specific additional goals and criteria for each evaluation cycle provided they have been mutually agreed to in writing, including a statement of the desirable outcomes for each goal. The criteria on which the Superintendent is to be evaluated regarding additional goals shall be mutually agreed upon and incorporated into a written evaluation instrument. The written agreement on additional goals must be entered into by no later than October 1 of each school year.

8.2 MID & END CYCLE REVIEW: On or before the 91st day of school and July 31st of each calendar year the Superintendent shall provide to the Committee at a duly called public meeting a written self-evaluation on mid-cycle and end of cycle goals. Her work since the last cycle review will be discussed in relation to the Board of Education's Principles of Effective Administration and Leadership and any additional goals or standards mutually agreed upon by the parties. The goals review shall refer to previous year's work as having been "exemplary", "proficient", "needs improvement" or "unsatisfactory" in relation to such Principles, goals, or standards. Each such conclusion shall be accompanied by a written narrative specifically referencing events, facts or action and DESE rubrics in support thereof.

8.3 SUMMATIVE EVALUATION: The Committee shall review the Superintendent's progress at end cycle on goals and self-evaluation in a public session prior to the commencement of the next school year and shall complete a summative evaluation assessing attainment of the goals against standards using the four DESE rubric ratings.

8.4 RECEIPT AND SIGNING: Any evaluation report delivered by the Committee will be signed by the Superintendent. Such signature shall not necessarily indicate agreement with the content thereof but rather acknowledgment of receipt of the document. The Superintendent may respond to the evaluation in writing and will deliver such response to the Chairperson of the Committee and a copy of the response will be attached to the evaluation and placed in the Superintendent's personnel file.

8.5 CONSENSUS DOCUMENT: The evaluation document shall consist of one document reflecting the consensus of the Committee. The consensus shall be compiled by the Committee Chair upon submission to the Chair of each member's individual assessment of the Superintendent's performance. Any individual document of an evaluative nature concerning the Superintendent prepared by any individual member shall be considered individual feedback and shall be provided to the Superintendent. Individual assessments are subject to public disclosure per M.G.L. c. 30A § 22(e).

8.6 PUBLIC DISCUSSION: All public discussion of the performance of the Superintendent will be conducted by the Committee only in accordance with the Open Meeting Law, and shall be conducted in open session except for such discussion that is part of negotiations for salary or compensation, which shall be conducted in Executive Session. *See* Mass. A.G. FAQ.

8.7 SPECIFIC WRITTEN FEEDBACK: In the event that the summative evaluation indicates that the performance of the Superintendent is "unsatisfactory" or "needs improvement" in any respect, the specifics which have given rise to this determination, the improvements that are expected and the indicators that will determine whether or not each deficiency cited has been remediated must be set forth in writing in the evaluation.

8.8 PROMPT NOTICE OF COMPLAINTS OR CONCERNS: Any criticisms, complaints, and suggestions called to the attention of the Committee shall be promptly and discreetly referred to the Superintendent in writing for study, disposition, or recommendation as appropriate to facilitate the orderly administration of the District and to ensure responsiveness to the public and fairness to the Superintendent. Any such matter not promptly raised may not be considered in the summative evaluation as the Superintendent may not be aware of same or may not have sufficient time to take remedial action.

9. LICENSE: The Superintendent hereby represents to the Committee that the Superintendent is currently licensed to serve as Superintendent of schools pursuant to the laws of the Commonwealth of Massachusetts and the Rules and Regulations of the Commissioner of Elementary and Secondary Education and the Massachusetts Department of Elementary and Secondary Education. As a condition of employment and continued employment, the Superintendent shall maintain, throughout the term of this AGREEMENT, a valid and appropriate license qualifying the Superintendent to serve as a Superintendent of Schools in a school district in the Commonwealth of Massachusetts, as required by Massachusetts General Laws, as such may be amended from time to time. The Superintendent agrees to notify the Committee within 24 hours of the Superintendent's license being revoked, rescinded, suspended, or lapsed.

10. PROFESSIONAL ACTIVITIES AND CONSULTING/TEACHING:

10.1 Professional Activities: The Superintendent shall devote her full-time, attention, and energy to the business of the Saugus Public Schools. However, the Committee encourages the continuing professional growth of the Superintendent through the Superintendent's participation, as the Superintendent might decide considering the responsibilities of Superintendent, in:

- A. the operations, programs, conferences, and other activities conducted or sponsored by local, state, and national school administrator and/or school committee associations;
- B. local, state and national conferences, seminars, and courses offered by private institutions, commissions, or committees related to education; and
- C. informational meetings with persons whose skills or backgrounds would serve to improve the capacity of the Superintendent to perform her professional responsibilities for the School District.

However, except for reimbursement for expenses consistent with Section 5 of this AGREEMENT, no other funds will be made available for any of the professional activities listed in this Section 10.1.

10.2 Consulting/Teaching: The Superintendent may engage in professional consulting/teaching work provided that such consulting/teaching work does not interfere with or detract from the Superintendent's work as Superintendent for the Saugus Public Schools. Superintendent must provide notice to the Committee Chair and uses her vacation leave to cover her absences, if any, for such consulting/teaching work. The Committee shall not reimburse the Superintendent for any expenses associated with such consulting/teaching work.

11. INDEMNIFICATION:

11.1 In accordance with and to the extent provided by applicable Massachusetts General Laws, the Committee agrees to provide indemnification to the Superintendent against all uninsured financial losses arising out of any proceeding, claim, demand, suit or judgment by the reason of alleged negligence or other conduct resulting in bodily or other injury to any person or damage to the property of any person committed while the Superintendent is acting within the scope of her employment or under direction of the Committee. The parties understand and agree that this indemnification provision shall not apply to actions by the Committee to suspend and/or terminate the Superintendent.

11.2 The Superintendent shall, within five (5) calendar days of the time the Superintendent is served with any summons, complaint, process, notice, demand or pleading, deliver a copy of the same to the Committee.

11.3 This Section 11 shall survive the termination of this AGREEMENT.

12. TERMINATION OF EMPLOYMENT AGREEMENT:

12.1 By the Committee with Good Cause: During the term of this AGREEMENT, the Committee may suspend the Superintendent from the position as Superintendent and/or may terminate the Superintendent's employment and this Employment AGREEMENT for insubordination, incompetency, neglect of duty, or other good cause. "Good cause" herein shall be defined as any ground put forth by the Committee in good faith that is not arbitrary, irrational, unreasonable or irrelevant to the task of building and maintaining an efficient school system. Prior to any termination for good cause, the Committee shall provide the superintendent with written notice of the reason, reasons, charge or charges against the Superintendent, and the grounds on which such reason(s) or charge(s) is based. Provided that the Superintendent has made a request in writing to the Chairperson of the Committee within fourteen (14) calendar days of receipt of such written notice, the Committee shall provide the Superintendent with a hearing upon said reason(s) or charge(s). Such hearing shall be conducted in accordance with the provisions of the Open Meeting Law, Massachusetts General Laws, Chapter 30A. The Superintendent shall be responsible for paying all fees and costs associated with such legal counsel. The decision of the Committee, after such hearing, if any, shall be final and binding, subject to review by an arbitrator appointed pursuant to the labor arbitration rules of the American Arbitration Association. A petition for arbitration contesting any alleged breach of this agreement by either party must be filed within thirty (30) days of the occurrence of the alleged breach. The parties agree to submit to the jurisdiction of the arbitrator and will produce documents and witnesses as required by arbitrable subpoenas. The parties shall evenly split the cost of the arbitrator and shall be responsible for their own legal fees. The arbitrator may award as a remedy damages but in no event shall the arbitrator order the Superintendent reinstated if it is determined the Committee has breached the agreement. The agreement to arbitrate shall be the exclusive remedy for all alleged breaches of this agreement but is not applicable to causes of action which an employee cannot, as a matter of law, be required to arbitrate, such as, for example claims of illegal employment discrimination. The Superintendent may request to use her accrued vacation days prior to the Superintendent's separation from employment. In the event of termination pursuant to this paragraph, which termination is upheld by an arbitrator, the Committee shall not be required to pay and the Superintendent shall not be entitled to receive, salary payments and benefits payable after the effective date of termination.

12.2 For Disability: Subject to applicable law, if the Superintendent is absent from work on account of a disability for more than one hundred (100) calendar days, the Committee shall have the option of terminating her employment and this Employment AGREEMENT. If the Committee exercises its option to terminate the Superintendent's employment and this Employment AGREEMENT, the Superintendent shall not be entitled to receive salary payments and benefits payable after the effective date of such termination.

12.3 By the Superintendent: The Superintendent may terminate her employment by submitting her written resignation to the Committee with as much advance notice as possible but no less than one hundred (100) calendar days advance notice. In the event of termination pursuant to this paragraph, the Committee shall not be required to pay, and the Superintendent shall not be entitled to receive, salary payments and benefits payable after the effective date of the Superintendent's resignation. The Superintendent may request to use her accrued vacation

days prior to the Superintendent's separation from employment and/or the Committee may schedule the Superintendent for vacation days prior to the Superintendent's final day of employment.

13. **TRANSITION:** The Committee, Acting Superintendent and/or Assistant Superintendent may request that the Superintendent be physically present in the Saugus School District prior to July 1, 2021 for the purposes of transitioning from the current administration to the Superintendent. To the extent that the Superintendent, the Committee, the Acting Superintendent and/or the Assistant Superintendent agree that the Superintendent shall do transition work, of up to five days, prior to July 1, 2021, the Committee shall pay the Superintendent at the rate of her first-year salary divided by 261 days per day (\$750 per day) for every day so authorized by the Committee and worked by the Superintendent minus withholdings for state and federal taxes and other withholdings required by law or authorized by the Superintendent. Incidental contact such as emails and/or telephone calls will not trigger the per diem payment.

14. **NOTICES:** All notices required or desired to be given under this AGREEMENT will be deemed to be served if in writing and delivered by in-hand delivery to the Superintendent or sent by certified mail to the Superintendent's residence in the case of the Superintendent, or sent by certified mail to its central office and in the case of the Committee with a copy sent by certified mail to the home address of the Chairperson of the Committee.

15. **ENTIRE AGREEMENT:** This AGREEMENT contains the whole agreement between the Committee and the Superintendent. There have been no inducements, promises, terms, conditions, or obligations made or entered into by either party other than those set forth herein. No modification of or addition to this AGREEMENT shall be effective unless and until set forth in writing and signed by the parties.

16. **SEVERABILITY:** If any term(s) or provision(s) of this AGREEMENT is held to be invalid or unenforceable for any reason by a court of competent jurisdiction, the validity and enforceability of the remaining terms and provisions shall not be affected, and such invalid and/or enforceable term(s) and/or provision(s) shall be modified to the extent necessary to make it or them enforceable.

17. **GOVERNING LAW:** This AGREEMENT shall be interpreted, enforced, governed and construed under and in accordance with the laws of the Commonwealth of Massachusetts.

18. **COUNTERPARTS:** This AGREEMENT shall be executed in two counterparts, each of which shall be deemed to be an original and both of which taken together will be deemed one and the same instrument.

IN WITNESS WHEREOF the parties have caused this AGREEMENT to be subscribed in duplicate on this 28 day of May, 2021.

1



Erin McMahon, Superintendent

ON BEHALF OF THE SAUGUS SCHOOL COMMITTEE
BY:



Thomas Whittredge, Chairperson
Saugus School Committee

Exhibit 2

email/Mon - 11:25
1/25

LONG, DIPIETRO, AND GONZALEZ, LLP
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January 25, 2023

VIA EMAIL ONLY: hgreenspan@greenspanlawyers.com
Atty. Howard L. Greenspan
200 Broadway, Ste. 304
Lynnfield, MA 01940

RE: Saugus Public Schools/Erin McMahon

Dear Mr. Greenspan,

Please consider this correspondence as two requests: first, for public records of the Saugus School Committee and second, as a contractually based request for documents relevant to the Superintendent's performance. I will forward it directly to the Committee RAO if you prefer, but given your active representation and the Committee's action in coercing the Superintendent into administrative leave last week pending an "investigation" into undefined or unspecified charges, this seems more efficient. Please let me know if you will accept this request on their behalf.

The complaint(s) against the Superintendent have not been reduced to writing, and remain ensconced only in the mind of the Committee Chair. I am concerned the Committee is rushing to a judgement about the Superintendent based on rumor, innuendo and gossip fostered by the Chair and other, as yet unnamed, sources. At no point since last summer has the chair had the courtesy to approach the Superintendent to discuss whatever concerns have been raised. To date, all we know is that there are "concerns" about administration of grants, a potential conflict of interest and issues with payment of unspecified "bills". A fourth item, related to the Superintendent's access to contractually permitted leave time was also raised at the Committee meeting on the 19th. Presumably there are Town officials who have expressed to the Chair an interest in these matters but have not had the courtesy or integrity to directly address their concerns directly with the Superintendent.

Even so, if the complaints to the Chair relate to administrative oversight, the Chair and the Committee must have a conversation with the Superintendent. While such a conversation may be difficult or awkward, it is one mandated by her contract. Article 8.8 requires that Committee promptly bring to her attention any complaints or concerns so that they may be addressed and corrected as needed. At this point we are well into this matter without benefit of a bill of particulars. As I understand the situation, the Committee is considering hiring an independent investigator to review anonymous, unspecified complaints based on mysterious communications received by the Chair. The Chair appeared to be reading from a document at the meeting of January 19, 2023 when the matter was under discussion. I am assuming these were his notes, or a summary of a conversation (s) with one or more persons with information relevant to the matter. The Committee has placed Superintendent McMahon on administrative leave without disclosing to her, in violation of her contract, the complaints referenced by the Chair and likely contained in the document to which he made reference at the meeting of the 19th.

As you know, administrative leave may constitute an adverse employment action. *Dahlia v. Rodriguez*, 735 F.3d 1060, 1078 (9th Cir. 2013) (en banc). In

United States ex rel. Herman v. Coloplast Corp., 295 F.Supp.3d 37 (D. Mass. 2018), the District Court set forth a useful analysis for determining whether an employer's action were 'adverse'. In *Herman*, the Court noted that **"whether a challenged action is materially adverse is 'an objective test and "should be judged from the perspective of a reasonable person in the plaintiff's position, considering all the circumstances."'**

" *Id.* (quoting *Lockridge*, 597 F.3d at 472) (quoting *Burlington Northern & Santa Fe Ry. v. White*, 548 U.S. 53, 71, 126 S.Ct. 2405, 165 L.Ed.2d 345 (2006)). Looking at the facts here, any reasonable person would conclude the placement of Ms. McMahon on administrative leave without prior notice of detailed factual allegations or specific charges, without an opportunity to confront her accusers and defend herself, is adverse and actionable. In anticipation of the Committee argument that she agreed to a leave, reasonable people will agree that consent obtained at the point of a spear is hardly freely given. I note her contract, §12.1, requires submission of any disputed breach to an arbitrator within thirty days. We have little time to resolve this matter.

In light of the Committee's contractual obligation to "promptly" produce evidence of complaints and other contract terms, the Committee's delegation of the choice of an "independent" investigator to the chair, and in the absence of a time frame for his or her commencement of work, we are requesting the following information both under relevant contract terms and as a public records request:

- 1) Any and all documents, as that term is defined under the Massachusetts Public Records law or regulations, referred to or consulted by the Chair at the Committee meeting of January 19, 2023 relative complaints, charges or concerns of any or all persons, including but not limited to, any and all town of Saugus officials, such as the Town Accountant, Town Treasurer or any other person responsible for processing for payment bills incurred by the Saugus Public Schools for any and all Professional Development programs from and after July 1, 2022 to January 19, 2022, which relate in any way to the performance or action of Superintendent McMahon.

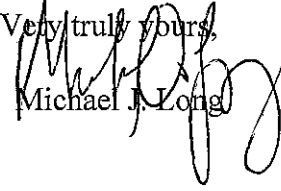
- 2) Any and all documents, as that term is defined under the Massachusetts Public Records law or regulations, relative complaints, charges, or concerns of any or all persons employed by the Saugus Public Schools or the Town of Saugus about the performance or behavior of Ms. McMahon in her capacity as Superintendent of the Saugus Public Schools concerning administration of federal grants, potential conflicts of interest, vendor payment practices, or access to contractual leave time, since July 1, 2022.
- 3) Copies of all emails, text messages, social media posts or any physical or electronic communications received by, or exchanged between or among, past or present Saugus School Committee members concerning, discussing, or referencing the performance or behavior of Ms. McMahon in her capacity as Superintendent of the Saugus Public Schools connected with or related to, in any way, her administration of federal grants, a potential conflict of interest, vendor payment practices, or access to contractual leave time, since July 1, 2022.
- 4) Copies of all documents in the possession, custody or control of any committee member, agent, or employee of the Committee (excluding counsel, but including, and not limited to, federal grant applications, terms and conditions applicable to administration of federal grants related to professional development for educators in the Saugus Public Schools, those related to any potential conflict of interest, and vendor payment practices), reviewed, consulted, possessed or produced by any means relative to the performance or behavior of Superintendent McMahon, which documents the Committee or any of its agents intend to provide to an "impartial investigator", so-called, to review any complaint, concern, or allegation relative to Ms. McMahon's performance or behavior since the commencement of her employment in Saugus.
- 5) Copies of all telephone or cell telephone records and bills listing any and all incoming or outgoing calls, texts, emails, or any other electronic form of communication among or between past or present Saugus School Committee members and any past or present employee of the Town of Saugus, including but not limited to, the Town treasurer and the Town Accountant, or any Saugus School Committee employee, whether personally owned, or municipally or school department issued.

Finally, as referenced above, these documents are also requested pursuant to the Superintendent's employment contract. The contract reflects an agreement to require observance of fundamental and basic due process. If there were genuine concerns about the matters alleged the Chair should have promptly brought them to the Superintendent's attention for review and response. Instead, the committee delegates to him the sole authority to retain an "investigator" to convene a Star Chamber proceeding where the Superintendent will be obliged to disprove whatever rumors motivate the Chair but which have not been disclosed to her. He acts at his peril for a violation of Ms. McMahon's civil rights.

Please also consider this correspondence notice of a "litigation hold" for the documents requested, and any other documents in the possession of your client or any and all of the

agents or employees of the Town of Saugus or the Saugus Public Schools which relate in any way to the performance of Ms. McMahon as Superintendent of the Saugus Public Schools.

Very truly yours,


Michael J. Long

Cc: Erin McMahon
Atty. McCarthy

Exhibit 3

February 1, 2023

VIA EMAIL ONLY: mlong@long-law.com

Michael J. Long, Esq.
Long & DiPietro, LLP
175 Derby Street, Unit 17
Hingham, MA 02043

Re: Saugus Public Schools/Erin McMahon

Dear Attorney Long:

I am in receipt of your correspondence dated January 25, 2023 in connection with the above referenced matter. Please be advised that your allegations that complaints about the Superintendent are based on rumor, innuendo and gossip fostered by the Chair; your presumption that Town officials have expressed an interest in these matters; and that there are anonymous unspecified complaints based on mysterious communications received by the Chair are completely false. Complaints have been made not by School Committee members but by employees of the District without input or direction of the Chair or any other member of the School Committee.

The Committee has hired an independent investigator to conduct an expeditious review of the complaints relating to the Superintendent's administration of the School District. The Superintendent will have a full opportunity to review the complaints in compliance with her contract and all due process rights of the Superintendent will be observed.

Ms. McMahon voluntarily placed herself on administrative leave. The School Committee accepted that offer in order to protect Ms. McMahon's reputation to the greatest degree possible. The cases that you have cited, more particularly Dahlia v. Rodriguez, 735 F.3d 1060, 1078 (9th Cir. 2013) as well as United States ex rel. Herman v. Coloplast Corp., 295 F.Supp.3d 37 (D.Mass 2018) are not relevant. These cases are in the context of employees being placed on administrative leave after their complaints of employment discrimination and/or retaliation. The facts do not support Ms. McMahon's voluntary administrative leave was after a complaint of discrimination or retaliation. The only reason for the administrative leave was to separate Ms. McMahon from the District while an investigation is being conducted and is not in any way to be considered punitive.

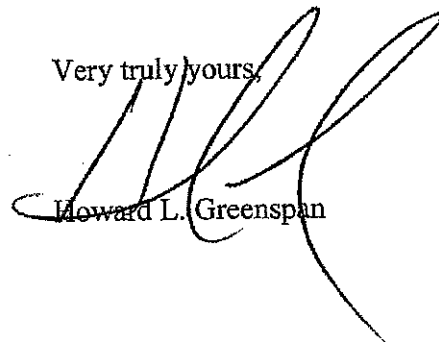
As to your request for public records the District is denying your request based on the following exemptions:

- a. These records are exempted from disclosure by statute;
- b. These records relate solely to internal personnel rules and practices;
- c. The request contains request for records relating to personnel files or information relating to a specific named individual;
- d. The request contains requests for personal notes/materials which are not maintained as part of the files of a governmental unit; and
- e. The request contains requests for information relating to an ongoing investigation which may be withheld if disclosure could alert suspects to the activities of the investigative officials. In addition, information may be withheld if disclosure is deemed to be prejudicial to potential future law enforcement activities.

Please be further advised that the District is committed to a prompt investigation and will provide Ms. McMahon all procedural and substantive due process rights.

I will also be forwarding to specific Town employees a litigation hold letter pursuant to your request.

Very truly yours,

A handwritten signature in black ink, appearing to read 'H. Greenspan', is written over the typed name. The signature is fluid and cursive, with a large loop at the end.

Howard L. Greenspan

Exhibit 4

LONG, DIPIETRO, AND GONZALEZ, LLP
ATTORNEYS AT LAW

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Hingham, MA 02043

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MICHAEL J. LONG
ROSANN DIPIETRO
KELLY T. GONZALEZ
LESLIE C. CAREY
SHARI B. ARIAIL

TELEPHONE (781) 749-0021
FACSIMILE (781) 749-1121
email@long-law.com

February 9, 2023

Via Electronic Mail To: pre@sec.state.ma.us
Office of the Supervisor of Public Records
Secretary of the Commonwealth, Public Records Division
McCormack Building
One Ashburton Place, Room 1719
Boston, MA 02108

**Re: Appeal of February 1, 2023 Response of the Saugus Public Schools
to January 25, 2023 Public Records Request**

Public Entity: Saugus Public Schools (“District”)

Requestor: Michael J. Long

Dear Office of the Supervisor:

Under M.G.L. c. 66, § 10A and in accordance with 950 C.M.R. 32.08(1), I am writing in appeal of Attorney Howard Greenspan’s February 1, 2023 response, to my understanding on behalf of the Saugus Public Schools (“Response”), to my January 25, 2023 public records request (“Request”) seeking the following District records under M.G.L. c. 66, § 10, M.G.L. c. 4, § 7, Clause 26, and 950 CMR 32.00:

- 1) *Any and all documents, as that term is defined under the Massachusetts Public Records law or regulations, referred to or consulted by the Chair at the Committee meeting of January 19, 2023 relative complaints, charges or concerns of any or all persons, including but not limited to, any and all town of Saugus officials, such as the Town Accountant, Town Treasurer or any other person responsible for processing for payment bills incurred by the Saugus Public Schools for any and all Professional Development programs from and after July 1, 2022 to January 19, 2022, which relate in any way to the performance or action of Superintendent McMahan;*

- 2) *Any and all documents, as that term is defined under the Massachusetts Public Records law or regulations, relative complaints, charges, or concerns of any or all persons employed by the Saugus Public Schools or the Town of Saugus about the performance or behavior of Ms. McMahon in her capacity as Superintendent of the Saugus Public Schools concerning administration of federal grants, potential conflicts of interest, vendor payment practices, or access to contractual leave time, since July 1, 2022;*
- 3) *Copies of all emails, text messages, social media posts or any physical or electronic communications received by, or exchanged between or among, past or present Saugus School Committee members concerning, discussing, or referencing the performance or behavior of Ms. McMahon in her capacity as Superintendent of the Saugus Public Schools connected with or related to, in any way, her administration of federal grants, a potential conflict of interest, vendor payment practices, or access to contractual leave time, since July 1, 2022;*
- 4) *Copies of all documents in the possession, custody or control of any committee member, agent, or employee of the Committee (excluding counsel, but including, and not limited to, federal grant applications, terms and conditions applicable to administration of federal grants related to professional development for educators in the Saugus Public Schools, those related to any potential conflict of interest, and vendor payment practices), reviewed, consulted, possessed or produced by any means relative to the performance or behavior of Superintendent McMahon, which documents the Committee or any of its agents intend to provide to an "impartial investigator," so-called, to review any complaint, concern, or allegation relative to Ms. McMahon's performance or behavior since the commencement of her employment in Saugus;*
- 5) *Copies of all telephone or cell telephone records and bills listing any and all incoming or outgoing calls, texts, emails, or any other electronic form of communication among or between past or present Saugus School Committee members and any past or present employee of the Town of Saugus, including but not limited to, the Town Treasurer and the Town Accountant, or any Saugus School Committee employee, whether personally owned, or municipally or school department issued.¹*

In a blanket Response to Item Nos. 1-5 of my Request, Attorney Greenspan stated only:

As to your request for public records the District is denying² your request based on the following exemptions:

¹ In clarification of Item No. 5 of my request, it is my intention that the scope of Item No. 5 be limited to copies of all telephone or cell telephone records and bills as described therein for the time period of July 1, 2022 through the date of my request (January 25, 2023).

² *A Guide to the Massachusetts Public Records Law*, published by the Office of the Secretary of the Commonwealth, rev. Dec., 2022, p. 8 states: "denial [of a public records request] must detail the specific basis for withholding the requested materials. The denial must include a citation to one of the statutory or common law exemptions upon which the records custodian relies, and must explain with specificity why the exemption applies. A denial must also

- a. *These records are exempted from disclosure by statute;*³
- b. *These records relate solely to internal personnel rules and practices;*
- c. *The request contains request for records relating to personnel files or information relating to a specific named individual;*
- d. *The request contains requests for personal notes/materials which are not maintained as part of the files of a governmental unit; and*
- e. *The request contains requests for information relating to an ongoing investigation which may be withheld if disclosure could alert suspects to the activities of the investigative officials. In addition, information may be withheld if disclosure is deemed prejudicial to potential future law enforcement activities.*

Copies of the District's Response and my Request are enclosed herein.

While Attorney Greenspan appears to be attempting to assert various M.G.L. c. 4, § 7, Clause 26 exemptions to disclosure, among others, on behalf of the District in this Response, he has failed to cite these exemptions, to assert them with specificity, or to assert any such exemptions as applicable to any specific portion(s) of Item Nos. 1-5 of my Request. Such specificity is required by law, as discussed herein.

Under M.G.L. c. 66, § 10(b), if a public entity "does not intend to permit inspection or furnish a copy of a requested record," the entity's written response "shall: . . . (iv) identify any records, categories of records or portions of records that the agency or municipality intends to withhold, and ***provide the specific reasons for such withholding, including the specific exemption or exemptions upon which the withholding is based, . . .***" (emphasis added). *See also*, 950 C.M.R. 32.06(3). Exemptions must be asserted with specificity because the Massachusetts public records law "presumes disclosure," with exemptions being "strictly and narrowly construed," requiring "careful case-by-case consideration. *See Rahim v. Dist. Att'y for the Suffolk Dist.*, 486 Mass. 544, 549 (2020), *citing Boston Globe Media Partners, LLC v. Department of Pub. Health*, 482 Mass. 427, 432 (2019), *quoting Globe Newspaper Co.*, 439 Mass. at 380 (2003), *WBZ-TV4 v. District Attorney for the Suffolk Dist.*, 408 Mass. 595, 603 (1990). Such narrow construction and case-by-case consideration is not possible without specific assertions regarding cited exemptions relative to specific responsive records. A custodian of the

advise the requestor of the right to seek redress through the administrative process provided by the Supervisor of Records as well as the judicial remedy available in superior court," citing M.G. L. c. 66, § 10(a-b), (b)(iv), and 950 C.M.R. 32.06(3)(c). *See also A Guide to the Massachusetts Public Records Law*, pp. 41, 51, 68. As outlined herein, the District's Response at issue on appeal does not set forth the requisite specifics or citations, nor does the Response advise regarding the right to seek redress through administrative process via the Office of the Supervisor or through judicial remedy via the Superior Court.

³ No statute is identified or referenced in the Response.

records “has the burden ‘to prove with specificity’ that an exemption applies,” a burden not met by general assertions made in a nonspecific manner. *See In re Subpoena Duces Tecum*, 445 Mass. 685, 688 (2006) (internal citations omitted). The District has failed to meet this burden via the Response at issue in this appeal. Merely paraphrasing various categories of exemptions that may sometimes be applicable to certain public record information under certain circumstances, without any explanation at all regarding how or why various categories of exemptions might apply, or to which portion(s) of which Item No.(s) of my Request to which they might apply, if any, is insufficient.

Further, in many cases, even if certain information contained in a particular responsive record is exempt from disclosure under applicable law and regulations, the record in its entirety is not exempt, therefore the custodian of records is obligated to produce the record appropriately redacted to remove the exempt information, and in such cases is not permitted to simply withhold an entire record, or broad categories or groups of records, in the entirety. Moreover, regardless of whether a public entity is redacting and/or withholding records under permissible exemptions, the custodian of records is obligated to conduct a good faith search and reasonably identify responsive record(s), inclusive of those warranting redaction or withholding in accordance with applicable law.

Because Attorney Greenspan’s February 1, 2023 Response, which I understand to be the District’s Response to my January 25, 2023 public records request, does not adequately identify responsive records, or cite or assert the claimed exemptions to disclosure with the requisite specificity, or relative to particular portion(s) of my Request, I respectfully request that the District be ordered to respond to my January 25, 2023 Request with specificity in accordance with Massachusetts public records law and regulations within ten (10) business days of your Office’s issuance of a determination regarding this appeal. Thank you for your consideration.

Very truly yours,

A handwritten signature in black ink, appearing to read 'M J Long' with a stylized flourish at the end.

Michael J. Long

Enclosures (2)

cc via electronic mail:

Attorney Howard L. Greenspan

Attorney Sheilah McCarthy

Erin McMahan, Superintendent, Saugus Public Schools

Exhibit 5

LONG, DIPIETRO, AND GONZALEZ, LLP
ATTORNEYS AT LAW

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ROSANN DIPIETRO
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TELEPHONE (781) 749-0021
FACSIMILE (781) 749-1121
email@long-law.com

Via email only to: rausrotas@arrowoodllp.com

Atty. Raymond L. Ausrotas
Arrowood LLP
10 post Office Square
Boston, MA

February 10, 2023

RE: Saugus Public Schools/Erin McMahon

Dear Atty. Austoras,

I represent the Massachusetts Association of School Superintendents, of which Erin McMahon is a member in good standing, and I represent her in her capacity as Superintendent in Saugus. She has been on leave from work since January 19, 2023 with no detailed or specific statement of reasons.

Atty. Howard L. Greenspan has informed me that you have been retained as an investigator to review various concerns of the Committee in relation to Superintendent McMahon in relation to administration of grants, a potential conflict of interest, and payment of bills. We have repeatedly asked for a bill of particulars on these matters, as Superintendent McMahon's contract specifically requires the committee to promptly bring to her attention any complaints or concerns. We were initially told the complaints were brought to the attention of the Committee Chair from members of the community. Later, we were advised these concerns were raised by employees of the district. By further vague allegations we were advised the Committee had concerns about her professional activities, about which they knew in advance, which required her presence out of the office.

I am sending with this letter copies of my January 25, 2023 request to Atty. Greenspan for information required by her contract and public records, the production of which are required by law. Atty. Greenspan responded on February 1, 2023 with a general denial of the request under the contract and under the public records statute. We have filed an appeal with the Supervisor of Public Records, dated February 9, 2023.

We believe these complaints are false and a subterfuge to undermine the Superintendent's reputation, character, and ability to direct the school system. The absence of specifics, more than three weeks after her placement on leave, and despite multiple requests for same, leave no doubt about the Committee's intentions.

Please send me a specific list of concerns, documents supporting the allegations, and any witness statements on which the Committee relies in making these allegations. We expect to receive a copy of any written report you make and will not waive our right to be present at a meeting at which these charges or complaints about Ms. McMahon are discussed orally if no written report is submitted. Please advise me of any dates on which individual committee members are provided an opportunity to review any written report you make if it is your intention not to submit a written report to the entire committee in order to evade the public records law or assert a privilege.

Please contact me if you have any questions.

Very truly yours,

Michael J. Long

CC: Erin McMahon
Atty. Sheilah McCarthy
Atty. Howard L. Greenspan

LONG, DIPIETRO, AND GONZALEZ, LLP
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TELEPHONE (781) 749-0021
FACSIMILE (781) 749-1121
email@long-law.com

March 7, 2023

VIA EMAIL ONLY: hgreenspan@greenspanlawyers.com
Atty. Howard L. Greenspan
200 Broadway, Ste. 304
Lynnfield, MA 01940

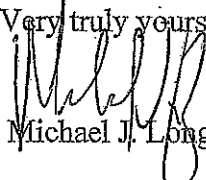
RE: Saugus/McMahon

Dear Mr. Greenspan,

I am following up on your letter of March 3, 2023.

I am attaching with this correspondence a transcript of the Executive Session of Committee meeting of January 19, 2023 made from an audio recording of the meeting. Superintendent McMahon will not here belabor her points that she was coerced into accepting a leave of absence status or that the Committee has no basis for this action.

The parties agreed in the contract to arbitrate disputes. We intend to do so.

Very truly yours,

Michael J. Long

cc: Erin McMahon
Atty. Sheilah McCarthy

Saugus School Committee – January 19, 2023 Executive Session,

/// = indiscernible

[0:00]

SC Counsel Howard Greenspan: Uh, Attorney Sheilah McCarthy is here on behalf of the Superintendent of Schools, uh, and, uh, we have worked on the opposite side of /// for a long period of time. Uh, and Attorney McCarthy is here in her representative capacity pursuant, uh, to the notice that we issued to the Superintendent of Schools, uh, on Tuesday about this executive session.

So, uh, I just want to set out on behalf of the Committee that, uh, we appreciate the Superintendent's agreement to, uh, voluntarily, uh, voluntarily, uh, go out on administrative leave on Tuesday. Uh, the Committee is not going to vote tonight to place the Superintendent on administrative leave. Uh, we, uh, hope to continue to work with you on a voluntary basis of the administrative leave and, if there would be some change, uh, in the Superintendent's position to that voluntary administrative leave, if you would provide us notice before that, we would then reconvene another meeting to act if we needed to. Uh, but, uh this way, we will maintain—we will not vote for administrative leave but work with you and accept the voluntary part of the administrative leave, uh, without a vote.

[1:35]

Attorney McCarthy: Of course.

SC Counsel Howard Greenspan: And, uh, recognizing your concerns and the Superintendent's concerns about the reputational issues, uh, for the superintendent moving forward and respecting, uh, those, uh, issues and those concerns that you and the superintendent have raised in the last couple of days. So, uh, that is going to be, that would be, uh, what our initial proposal would be and then, uh, really the only thing tonight is we do not have specifics as to, uh, the nuts and bolts of, uh, the concerns but we do have just broad strokes and, uh, we will just tell you that those broad issues are and I don't have the details yet, uh, of those things as, uh, number one, uh, what we're going to be looking into is the administration of grants and how that has been administered, uh, that's number one. Number two, uh, there's is a potential concern about a conflict of interest, uh, with a, uh, company that's done some development work in town. And the third issue is, uh, actually tied into the grants issue in terms of, uh, issues related to bills and billings of, uh, outside consultants. And the last issue would be, uh, certain concerns or issues about, uh, the time and, uh, use of days of being in district and out of district, uh ///July///.

So, we don't—that's all we know as of this point. Uh, we have complaints we feel we're obligated to look into. Uh, we don't presume, uh, that there's been wrongdoing but we feel that we're obligated to review those issues. And that the only action the Committee will take tonight in terms of a vote is to authorize the Chair to, uh, retain consultants in his discretion, uh, in furtherance of, uh, investigating these issues.

[Pause]

That's, that's all we have.

[4:38]

Superintendent McMahon: May I ask a question? May I ask a question?

SC Counsel Howard Greenspan: You may...I, I, I don't want to, yeh, you may, I just don't, I don't want to get into too much details 'cause I don't know a lot of things, but you may, so...

Superintendent McMahon: Why is the Chair being authorized and not the Committee to approve...?

SC Counsel Howard Greenspan: [interrupting] Well, the committee is authorizing the chair 'cause...uh, I know right now we intend to retain a municipal auditing CPA firm to look at the grant issues. I think that's beyond the capabilities of anybody in-house, and possibly, uh, retain somebody else to investigate the other issues because I'm not sure that I want to do it based on the fact that I've worked with the Superintendent for a year and a half. Uh, and, uh, feel that would kind of not be, uh, something that I... a path that I would want to go down based on, uh, our good working relationship over the past year and a half that I don't necessarily want to be in that position. And I want people to believe that a fair and impartial, uh, investigation has taken place. So that would be—that would be the parameters of these consultants.

[6:20]

Superintendent McMahon: So, reading a statement, colored in both green and white in case you want a green or white copy.

As Superintendent, I am deeply committed to improving the lives of the students and families of Saugus. I have been thrilled with the progress. I love my job. The educators have made incredible gains toward the shared goals of closing our achievement gaps, reaching all learners, and doing the work educators do every day to change lives for the better. That is our mission at the Saugus Public Schools.

As Superintendent, I expect the School Committee to take an active and engaged interest in my management of the district, and I expect them to bring any questions or concerns. The district's financial records were audited every year by independent CPAs who have never reported to me that the school department should change or adjust any practices.

While I have not yet been provided with any specific allegations made against me, any allegations of wrongdoing are... on my part are false. With the assistance of my attorneys, Michael Long and Sheilah McCarthy, I will zealously and transparently defend my unblemished professional reputation.

I welcome review and oversight by a qualified professional investigator. I look forward to assisting in an unbiased review, which I hope will be done efficiently and expeditiously.

On Tuesday, January 17, 2023, I voluntarily stepped back from my duties as Superintendent, pending the completion of the investigation and am on paid administrative leave.

I look forward to returning soon to leading this district toward providing the best possible education for the children of Saugus.

Thank you.

[1:31]

Attorney Howard Greenspan: Thank you. Other than that...do we have a motion?

[Member Hatch] Mr. Chairman, I make a motion to authorize you, the Chair of the School Committee, to retain further professional such as hiring consultants, auditing firms, special counsel; to clear up this matter as soon as possible and move us forward.

[Another member] I'll second.

Roll call vote

All 5 members voted in favor.

Superintendent McMahon: Thank you very much.

Meeting breaks up at 9:32

Saugus School Committee – January 19, 2023 Executive Session,
/// = indiscernible

[0:00]

SC Counsel Howard Greenspan: Uh, Attorney Sheila McCarthy is here on behalf of the Superintendent of Schools, uh, and, uh, we have worked on the opposite side of /// for a long period of time. Uh, and Attorney McCarthy is here in her representative capacity pursuant, uh, to the notice that we issued to the Superintendent of Schools, uh, on Tuesday about this executive session.

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As Superintendent, I expect the School Committee to take an active and engaged interest in my management of the district, and I expect them to bring any questions or concerns. The district's financial records were audited every year by independent CPAs who have never reported to me that the school department should change or adjust any practices.

While I have not yet been provided with any specific allegations made against me, any allegations of wrongdoing are ... on my part are false. With the assistance of my attorneys, Michael Long and Sheilah McCarthy, I will zealously and transparently defend my unblemished professional reputation.

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Thank you.

[1:31]

Attorney Howard Greenspan: Thank you. Other than that...do we have a motion?

[Member Hatch] Mr. Chairman, I make a motion to authorize you, the Chair of the School Committee, to retain further professional such as hiring consultants, auditing firms, special counsel, to clear up this matter as soon as possible and move us forward.

[Another member] I'll second.

Roll call vote

All 5 members voted in favor.

Superintendent McMahon: Thank you very much.

Meeting breaks up at 9:32

CHARTER OF THE TOWN OF SAUGUS

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ARTICLE 1

CHAPTER 55 OF THE ACTS OF 1928

AN ACT PROVIDING FOR PRECINCT VOTING, REPRESENTATIVE TOWN MEETINGS, TOWN MEETING MEMBERS, A REFERENDUM AND A MODERATOR TO SERVE FOR A YEAR IN THE TOWN OF SAUGUS.

ARTICLE 1

SECTION 1. The selectmen of the town of Saugus, as hereinafter provided, shall forthwith divide the territory thereof into ten voting precincts, each of which shall be plainly designated, and shall contain approximately an equal number of registered voters. The precincts shall be so established as to consist of compact and contiguous territory to be bounded, as far as possible, by the center line of known streets and ways or by other well defined limits. Their boundaries shall be reviewed and, if need be, wholly or partly revised by the selectmen in October, once in five years, or in October of any year when so directed by a vote of a representative town meeting held not later than September twentieth of that year. The selectmen shall, within ten days after any establishment or revision of the precincts, file a report of their doings with the town clerk, the registrars of voters and the assessors, with a map or maps or description of the precincts and the names and residences of the registered voters therein. The selectmen shall also cause to be posted in the town hall a map or maps or description of the precincts as established or revised from time to time, with the names and residences of the registered voters therein; and they shall also cause to be posted in at least one public place in each precinct a map or description of that precinct, with the names and residences of the registered voters therein. The division of the town into voting precincts and any revision of such precincts shall take effect upon the date of the filing of the report thereof by the selectmen with the town clerk. Whenever the precincts are established or revised, the town clerk shall forthwith give written notice thereof to the state secretary, stating the number and designation of the precincts. Meetings of the registered voters of the several precincts for elections, for primaries, and for voting upon any question to be submitted to all the registered voters of the town, shall be held on the same day and at the same hour and at such place or places within the town as the selectmen shall in the warrant for such meeting direct. The provisions of the general laws relating to precinct voting at elections, so far as the same are not inconsistent with this act, shall apply to all elections and primaries in the town upon the establishment of voting precincts as hereinbefore provided. *(As amended by Ch. 17, Acts of 1947)*

ARTICLE 1

SECTION 2. The representative town meeting membership shall consist in each precinct of five members, who shall be elected for terms of two years each by official ballot at the biennial town election. The town clerk shall after every election of town meeting members forthwith notify each such member by mail of his election. Upon the qualification of a majority of the town meeting members elected at the town election to be held on the third Monday of January, nineteen hundred and forty-eight, the terms of office of all town meeting members then in office shall terminate.

(As amended by Ch. 367, Acts of 1941 and Ch. 17, Acts of 1947)

ARTICLE 1

SECTION 3. The representative town meetings held under this act, except as otherwise provided herein, shall be limited to the elected town meeting members. The town clerk shall notify the town meeting members of the time and place at which representative town meetings are to be held, the notices to be sent by mail at least seven days before the meeting. The town meeting members, as aforesaid, shall be the judges of the election and qualifications, as set forth in this act, of their members. A majority of the town meeting members shall constitute a quorum for doing business; but a less number may organize temporarily and may adjourn from time to time. All town meetings shall be public. The town meeting members as such shall receive no compensation. Subject to such conditions as may be determined from time to time by the members of the representative town meeting, any registered voter of the town who is not a town meeting member may speak at any representative town meeting, but shall not vote. A town meeting member may resign by filing a written resignation with the town clerk, and such resignation shall take effect on the date of such filing. A town meeting member who removes from the town shall cease to be a town meeting member, and an elected town meeting member who removes from the precinct from which he was elected to another precinct may serve only until the next annual town meeting.

(As amended by Ch. 17, Acts of 1947)

ARTICLE 1

SECTION 4. Nomination of candidates for town meeting members to be elected under this act shall be made by nomination papers, which shall bear no political designation, shall be signed by not less than ten voters of the precinct in which the candidate resides, and shall be filed with the town clerk no later than five o'clock P.M. on the second Monday preceding the election. No nomination papers shall be valid in respect to any candidate whose written acceptance is not thereon or attached thereto when filed.

ARTICLE 1

SECTION 5. The articles in the warrant for every town meeting, so far as they relate to the election of town officers and town meeting members, and as herein provided, to referenda, and all matters to be acted upon and determined by ballot, shall be so acted upon and determined by the registered voters of the town in their respective precincts. All other articles in the warrant for any town meeting, beginning with the town meeting at which said town meeting members are first elected, shall be acted upon and determined exclusively by town meeting members at a meeting to be held at such time and place as shall be set forth by the selectmen in the warrant for the meeting, subject to the referendum provided for by section eight. *(As amended by Ch. 17, Acts of 1947)*

ARTICLE 1

SECTION 6. At the first representative town meeting after each election of town meeting members, one of said members shall be elected to serve as moderator of all town meetings, except as otherwise provided by law, for a term of two years or until a successor is elected and qualified. Any vacancy in the office of moderator may be filled for the balance of the term by such members at a meeting held for that purpose. If the

moderator is absent, a moderator pro tempore shall be elected by the town meeting members. *(As amended by Ch. 17, Acts of 1947)*

ARTICLE 1

SECTION 7. When a vacancy occurs in the full number of town meeting members from any precinct, the vacancy shall be filled by the candidate in the last election, for the office, who received the highest number of votes of all candidates who failed to be elected, but who received at least 30 votes in the election. In the event there is no such candidate the choice to fill any vacancy shall be by ballot of a majority of the remaining members, and a majority of votes cast shall be required for a choice. In such case the remaining members shall, at the call of the town clerk, hold a meeting for the purpose of filling any such vacancy. The chairman and clerk shall count the ballots and shall make a certificate of the choice and forthwith file the same with the town clerk, together with a written acceptance by the member or members so chosen, who shall thereupon be deemed elected and qualified as a town meeting member or members, subject to the right of all the town meeting members to judge the election and qualifications of the members as set forth in section three.

(As amended by Ch. 23, Acts of 1976 and Ch. 350, Acts of 2000)

ARTICLE 1

SECTION 8. No vote, except a vote to adjourn or authorizing the borrowing of money in anticipation of the receipt of taxes for the current year, passed at any representative town meeting shall be operative until after the expiration of ten days, exclusive of Sundays and holidays, from the close of the session of the meeting at which said vote was passed. If within said ten days, a petition, signed by not less than ten per cent of the registered voters of the town, containing their names and addresses as they appear on the list of registered voters, is filed with the Selectmen asking that the question or questions involved in such vote be submitted to the registered voters of the town at large, then the selectmen, after the expiration of five days, shall forthwith call a special meeting for the sole purpose of presenting to the registered voters at large the question or questions so involved. The polls shall be opened at twelve o'clock noon and shall be closed not earlier than eight o'clock in the evening and all votes upon any questions so submitted shall be taken by ballot, and the check list shall be used in the several precinct meetings in the same manner as in the election of town officers. The questions so submitted shall be determined by vote of the same proportion of voters at large voting thereon as would have been required by law of the town meeting members had the question been finally determined at a representative town meeting. The questions so submitted shall be stated upon the ballot in substantially the same language and form in which they were stated when presented to said representative town meeting by the moderator, and as appears from the records of said meeting. If such petition is not filed within the said period of ten days, the vote of the representative town meeting shall become operative and effective upon the expiration of said period.

(As amended by Ch. 248, Acts of 1933 and Ch. 34, Acts of 1953)

ARTICLE 1

SECTION 9. This section is repealed. *(As amended by Ch. 17, Acts of 1947)*

ARTICLE 1

SECTION 10. All by-laws or parts of by-laws of the town inconsistent with the provisions of this act are hereby repealed. The provisions of chapter forty-four of the General Laws shall continue to apply in the town of Saugus notwithstanding the provisions of this act.

ARTICLE 1

SECTION 11. The town of Saugus, after the acceptance of this act, shall have the capacity to act through and be bound by its said town meeting members who shall, when convened from time to time as herein provided, constitute representative town meetings; and such representative town meetings shall exercise exclusively, so far as will conform to the provisions of this act, all powers vested in the municipal corporation. Action in conformity with all provisions of law now or hereafter applicable to the transaction of town affairs in town meetings shall, when taken by any representative town meeting in accordance with the provisions of this act, have the same force and effect as if such action had been taken in a town meeting open to all the voters of the town as hithertofore organized and conducted.

ARTICLE 1

SECTION 12. The act shall not abridge the right of the inhabitants of the town of Saugus to hold general meetings, as that right is secured to them by the constitution of this commonwealth; nor shall this act confer upon any representative town meeting in Saugus the power finally to commit the town to any measure affecting its municipal existence or changing its government, without the action thereon by the voters of the town at large, using the ballot and the check list therefor.

ARTICLE 1

SECTION 13. This act shall be submitted to the registered voters of the town of Saugus at the annual town meeting to be held in March in the current year. The vote shall be taken in precincts by ballot in accordance with the provisions of the general laws, so far as the same shall be applicable, in answer to the question, which shall be placed upon the official ballot to be used at said meeting: "Shall an act passed by the general court in the year nineteen hundred and twenty-eight, entitled 'An Act providing for precinct voting, representative town meetings, town meeting members, a referendum and a moderator to serve for a year in the town of Saugus', be accepted by this town?" So much of this act as authorizes its submission to the registered voters of the town of Saugus shall take effect upon its passage, and the remainder shall take effect upon its acceptance by a majority of the voters voting thereon.

ARTICLE 1

SECTION 14. If this act is rejected by the registered voters of the town of Saugus when submitted to said voters under section thirteen, it may again be submitted for acceptance in like manner from time to time to such voters at any annual or special town meeting called for the purpose in said town within three years thereafter, but not more than three times in the aggregate.

Approved February 17, 1928

ARTICLE 2

CHAPTER 17 OF THE ACTS OF 1947

AN ACT CHANGING THE REPRESENTATIVE TOWN MEETING FORM OF GOVERNMENT IN THE TOWN OF SAUGUS AND COMBINING THEREWITH A TOWN MANAGER FORM OF GOVERNMENT.

ARTICLE 2

SECTION 1. Upon the acceptance of this act by the town of Saugus, as hereinafter provided, beginning with the year nineteen hundred and fifty-three, the regular town election of said town for the purpose of electing town officers, including town meeting members, and for the submission of questions to the voters of the town if required to be submitted thereat shall be held biennially on the Tuesday next after the first Monday in November between the hours of seven ante meridian and eight post meridian in every odd-numbered year. All articles in the warrant for any regular town meeting relating to matters required by chapter fifty-five of the acts of nineteen hundred and twenty-eight, as amended, or by any other provision of law to be acted upon and determined otherwise than by ballot shall be considered at a town meeting to be held annually on the first Monday of May at seven-thirty in the evening; provided, that the regular town meeting for the consideration of such articles in nineteen hundred and forty-eight shall be held on the first Monday of February at eight o'clock in the evening.

Notwithstanding the provisions of any general or special law to the contrary, in all town elections held in the town of Saugus the names of all candidates for town office and town meeting member shall appear on the official ballot in the order in which they are drawn by lot. Each such drawing shall be conducted by the registrars of voters or by their designees. Each candidate, or his duly authorized representative, shall have an opportunity to be present at such drawing. After the name of each candidate for an office who is an incumbent thereof shall be added the words "Candidate for reelection".
(As amended by Ch. 606, Acts of 1951, Ch. 625, Acts of 1975, Ch. 143, Acts of 1984, and Ch. 27, Acts of 1994)

ARTICLE 2

SECTION 1A. *Candidacy Limit on Town-wide Elective Office.* For the purposes of this section, "major town-wide elective office" shall mean the selectmen's office, the school committee and the housing authority and "town-side office" shall mean all other elected offices in the town. No person's name may appear on the ballot for more than 1 major town-wide elective office. A person's name may appear on the ballot for any town-side office and town meeting within such person's precinct.

(As amended by Ch 99 Acts of 2011)

ARTICLE 2

SECTION 2. *Election of Selectmen.* At the town election held in each biennial odd-numbered year, the registered voters of the town shall elect five selectmen who shall hold office for a term of two years from the biennial town election at which they are elected. In the event a selectman duly elected by the voters shall fail to serve out his term of office, the town clerk shall declare said office vacant and declare the person with the next highest number of votes in said biennial election as having been elected to said

vacant office and such person shall be immediately thereupon sworn into said office to fill the unexpired term of said vacant office. In the event there is no person who obtained a minimum of fifteen hundred votes for selectman in said biennial election and a vacancy in the office of selectman shall have occurred, the town clerk shall declare said office vacant and a special election may be called for as provided for by law. Nothing contained herein shall be construed to effect section forty-eight.

(As amended by Ch. 79, Acts of 1951 and Ch. 545, Acts of 1981)

ARTICLE 2

SECTION 3. *Powers of the Selectmen.* The selectmen shall be the chief policy makers of the Town.

(As amended by Ch 99 Acts of 2011)

ARTICLE 2

SECTION 3A. *Appointive Powers of Selectmen.* The selectmen shall appoint, and may remove, members of the board of appeals, the board of library trustees, cemetery commissioners, election officers, and the registrars of voters, except the town clerk.

(As amended by Ch. 477, Acts of 2002 and Ch 99 Acts of 2011)

ARTICLE 2

SECTION 3B. *Residency Requirement.* Any person who is appointed or reappointed to any town board, committee, commission, council, or task force, by whomever appointed, shall be a presently domiciled resident of the town of Saugus. All such appointments shall terminate immediately when such appointee's Saugus residency ends. This section shall not apply to town employees appointed to temporary ad hoc type committees.

(As amended by Ch. 528, Acts of 1986 and Ch 99 Acts of 2011)

ARTICLE 2

SECTION 4. *Election of School Committee.* At the nineteen hundred and fifty-two town election, and at each biennial town election thereafter, the registered voters of the town shall elect five members of the school committee, who shall hold office for two years. Members of the school committee elected hereunder shall serve until the qualification of their successors. Upon the election and qualification of the members of the school committee in the year nineteen hundred and fifty-two, the terms of office of the members of the then existing committee shall terminate.

(As amended by Ch. 79, Acts of 1951)

ARTICLE 2

SECTION 4 A. *School Committee Vacancy.* If a school committee member, duly elected by the voters, fails to serve out his term of office, the town clerk shall declare the person with the next highest number of votes amongst the unsuccessful candidates for school committee member at the most recent biennial election as having been appointed to the vacant office; provided, however, that such candidate shall have received a minimum of 1,000 votes. The town clerk shall immediately swear such person into office to serve the balance of the unexpired term.

(As amended by Ch 99, Acts of 2011)

ARTICLE 2

SECTION 4 B. If no candidate amongst the unsuccessful candidates for school committee received at least 1,000 votes, the town clerk shall declare said office vacant. If the town clerk declares a vacancy on the school committee pursuant to this section, the remaining members of the school committee shall give written notice of the vacancy to the selectmen with 30 days of such declaration. Within 7 days of receipt of such notice, the remaining member or members of the school committee and the selectmen shall fill such vacancy by roll call vote. If the remaining members of the school committee fail to provide such notice, as required in this section, the selectmen shall fill such vacancy. A majority of the votes of the officers entitled to vote shall be necessary to fill a vacancy under this section. The person appointed shall be a registered voter of the town and shall perform the duties of the office until the next town election. Nothing in this section shall be construed to impair the application of section 48.

(As amended by Ch 99, Acts of 2011)

ARTICLE 2

SECTION 5. *Powers of School Committee.* Upon the election and qualification of the five members of the school committee elected as herein provided, all the powers, rights, duties and liabilities, except as hereinafter provided, now or hereafter conferred or imposed by law upon the school committee, shall be exercised and performed by the school committee elected under the provisions of this section. Nothing in this act shall be construed to affect the powers and duties of the school committee as provided by law, except as specifically provided herein.

ARTICLE 2

SECTION 6. *Multiple Officers.* A member of the board of selectmen, or of the school committee, or of the finance committee shall, during the term for which he was elected or appointed, be ineligible either by election or appointment to hold any other town office. Any person appointed by the town manager to any town office under the provisions of this act or of any general or special law shall be eligible during the term of said office to appointment to any other town office, except that the town accountant shall not be eligible to hold the position of town treasurer or the position of town collector. The town manager, subject to any applicable provision of the General Laws relating thereto, may assume the duties of any office which he is authorized to fill by appointment.

ARTICLE 2

SECTION 7. *Investigations or Surveys.* For the purpose of making investigations or surveys, the selectmen may employ such experts, counsel and other assistants and incur such other expenses, not exceeding in any year the sum of one thousand dollars, or such larger sum as may be appropriated for the purpose by the town, as they may deem necessary, and the same shall be paid by the treasurer upon a warrant signed by a majority of the board of selectmen.

TOWN MANAGER

ARTICLE 2

SECTION 8. *Appointment of Town Manager.* The selectmen elected as provided herein shall appoint by a four-fifths vote of the membership and subject to the provisions of this chapter, as soon as practicable, for a term of years, a town manager who shall be a person especially fitted by education, training and experience to perform the duties of the office. The town manager shall be appointed without regard to his political beliefs. He need not be a resident of the town or the commonwealth. Before entering upon the duties of his office, the town manager shall be sworn to the faithful performance thereof by the chairman of the board of selectmen, or by the town clerk or by a justice of the peace. He shall execute a bond in favor of the town for the faithful performance of his duties in such sum and with such surety or sureties as may be fixed or approved by said board of selectmen.

(As amended by Ch. 104, Acts of 1979 and Ch. 395, Acts of 1982)

ARTICLE 2

SECTION 8A. *Extension or Renewal of Town Manager.* The selectmen may extend or renew the term of a town manager who was previously appointed pursuant to Section 8. The extension or renewal shall be for a term of years by a 3/5 vote of the membership.

(As amended by Ch. 54, Acts of 2013)

ARTICLE 2

SECTION 9. *Appointment of a Temporary Manager.* Any vacancy in the office of town manager shall be filled as soon as possible by the selectmen. Pending the appointment of a town manager or the filling of any vacancy, the selectmen may appoint a suitable person to perform the duties of the office.

ARTICLE 2

SECTION 10. *Acting Manager.* The town manager may designate, by letter filed with the town clerk, a qualified officer of the town to perform his duties during his temporary absence or disability. In the event of the failure of the manager to make such designation, the selectmen shall, by resolution, designate an officer of the town to perform the duties of the manager until he shall return or his disability shall cease.

(As amended by Ch. 104, Acts of 1979)

ARTICLE 2

SECTION 11. *Removal of Manager.* The selectmen, by a vote of four of the five members of the board, may remove the town manager. At least thirty days before such proposed removal shall become effective, the selectmen shall file a preliminary written resolution with the town clerk setting forth in detail the specific reasons for his proposed removal, a copy of which resolution shall be delivered to the town manager. The manager may reply in writing to the resolution and may request a public hearing. If the manager so requests, the board of selectmen shall hold a public hearing not earlier than twenty days nor later than thirty days after the filing of such request. After such public hearing, if any,

otherwise at the expiration of thirty days following the filing of the preliminary resolution, and after full consideration, the selectmen by a majority vote of the full membership of the board may adopt a final resolution of removal. In the preliminary resolution, the selectmen may suspend the manager from duty, but shall in any case cause to be paid to him forthwith any unpaid balance of his salary and his salary for the next three calendar months following the filing of the preliminary resolution.

(As amended by Ch. 199, Acts of 1952 and Ch. 203, Acts of 1984)

ARTICLE 2

SECTION 12. Compensation of Manager. The town manager shall receive such compensation for his services as the selectmen shall determine but it shall not exceed the amount appropriated therefor by the town.

ARTICLE 2

SECTION 13. Powers and Duties of the Manager. In addition to specific powers and duties provided in this act the town manager shall have the general powers and duties enumerated in this section:

(a) ~~The town manager shall supervise and direct the administration of all departments, commissions, boards and offices, except the board of selectmen, the school committee, the board of appeals, the board of library trustees, election officers and the registrars of voters.~~

(b) The town manager, in accordance with the provisions of this act ~~and except as otherwise expressly prohibited by the General Laws,~~ may reorganize, consolidate or abolish departments, commissions, boards or offices under his direction and supervision, in whole or in part, may establish such new departments, commissions, boards or offices as he deems necessary, and may transfer the duties, powers and appropriation of one department, commission, board or office to another.

(c) Except as otherwise provided by this act, the town manager shall appoint upon merit and fitness alone, and, subject to the provisions of chapter thirty-one of the General Laws where applicable, may remove, all officers and employees of the town, ~~except employees of the school department;~~ town officers and employees not subject to the provisions of said chapter thirty-one shall not be removed by him except on five days notice in writing, setting forth the cause of such removal. All appointments to multimember town boards made by the manager must be approved by a majority vote of the full board of selectmen, meeting in open session at a regularly scheduled meeting, each such vote to be taken by a call of the roll. *(Amended by Ch. 140, Acts of 1984)*

(d) Notwithstanding the provisions of section one hundred and eight of chapter forty-one of the General Laws, but subject to all applicable provisions of chapter thirty-one of the General Laws, the town manager shall fix the compensation of all town officers and employees subject to removal by him.

(e) The town manager shall attend all regular meetings of the board of selectmen except meetings at which his removal is being considered.

(f) The town manager shall keep full and complete records of his office, and shall render as often as may be required by the selectmen a full report of all operations during the period reported on.

(g) The town manager shall keep the selectmen fully advised as to the needs of the town and shall recommend to the selectmen for adoption such measures requiring action by them or by the town as he may deem necessary or expedient.

(h) The town manager shall have jurisdiction over the rental and use of all town property and shall be responsible for the maintenance and repair of all town buildings, and including school buildings. He shall be responsible for the preparation of plans and the supervision of work on existing buildings or on the construction of new buildings.

Any proposed lease, rental or other agreement to authorize the use of town property for a period exceeding 180 days shall be approved in advance by a three-fifths vote of the board of selectmen at a regularly scheduled public meeting. The board shall be provided the final documents containing such proposed lease, rental or other agreement at least 7 days before such public meeting. If the selectmen fail to approve any such document within 21 days of the public meeting at which the document was considered, such failure shall be deemed a rejection.

The town manager shall not enter into negotiations to lease, rent or agree to authorize the use of town property without prior approval by a three-fifths vote of the board of selectmen at a regularly scheduled public meeting.

(i) The town manager shall purchase all supplies and materials and equipment, except books for schools, and shall award all contracts for all departments of the town. He shall make purchases for departments not under his supervision only upon requisition duly signed by the head of such department.

(j) The town manager shall administer either directly or through a person or persons appointed by him in accordance with this act all provisions of general and special laws applicable to said town, all by-laws and all regulations established by the selectmen.

~~(k) The town manager shall have authority to prosecute, defend and compromise all litigation to which the town is a party, and to employ special counsel to assist the town counsel whenever in his judgment it may be necessary.~~

~~(l) The town manager shall perform such other duties, consistent with his office, as may be required of him by the by-laws of the town or by vote of the selectmen.~~

(As amended by Ch. 104, Acts of 1979 and Ch 99 Acts of 2011)

ARTICLE 2

SECTION 14. *Investigations by the Manager.* The town manager may without notice cause the affairs of any division or department under his control or the conduct of any officer or employee thereof to be examined. The town manager shall have access to all town books and papers for information necessary for the proper performance of his duties.

ARTICLE 2

SECTION 15. *Appointment of Planning Board.* There shall be established a planning board as herein provided which shall have all the powers and duties of planning boards established in accordance with section eighty-one A of chapter forty-one of the General Laws, except that such planning board shall not be authorized to act as playground commissioners. The board established hereunder shall consist of five members who shall be appointed by the town manager. When such board is first established its members shall be appointed for terms of such length and so arranged that

the term of at least one member will expire each year and his successor shall be appointed by the town manager for a term of five years. Any vacancy shall be filled for the unexpired term by the town manager. Upon the appointment and qualification of the members of the board, the term of office of members of the then existing planning board shall terminate.

ARTICLE 2

SECTION 16. *Appointment of Board of Public Welfare.* The town manager shall appoint a board of public welfare to consist of three suitably qualified persons. One of said persons shall be appointed for a term of one year, one for a term of two years, and one for a term of three years; and annually thereafter there shall be appointed by the town manager, a member for a term of three years in the place of the member whose term is to expire. The members shall serve until their successors are appointed and qualified. If for any reason a vacancy occurs in the membership of the board of public welfare, the vacancy shall be filled forthwith by the town manager for the unexpired term. Upon the appointment and qualification of the members of the board of public welfare as provided in this section the terms of office of the members of the then existing board of public welfare of the town shall terminate. The board of public welfare appointed hereunder shall organize for the proper conduct of their duties and shall possess all the powers and rights and be subject to all the duties and liabilities conferred or imposed by law upon boards of public welfare of towns, but in the performance of their duties they shall be subject to the general supervision and direction of the town manager. They shall be sworn to the faithful performance of their duties by the chairman of the selectmen or by a justice of the peace.

ARTICLE 2

SECTION 17. *Appointment of Board of Health.* The town manager shall appoint a board of health to consist of five suitably qualified persons. In nineteen hundred and ninety, in addition to the three present board members whose terms shall continue until they expire, the town manager shall appoint two members one for a term of two years and one for a term of one year and annually thereafter, there shall be appointed members for terms of three years in place of those members whose term is to expire. The members shall serve until their successors are appointed and qualified. If for any reason a vacancy occurs in the membership of the board of health, the vacancy shall be filled forthwith by the town manager for the unexpired term. Upon the appointment and qualification of the members of the board of health as provided in this section the terms of office of the members of the then existing board of health of the town shall terminate. The board of health appointed hereunder shall organize for the proper conduct of their duties and shall possess all the powers and rights and be subject to all the duties and liabilities conferred or imposed by law upon boards of health of towns, but in the performance of their duties they shall be subject to the general supervision and direction of the town manager. They shall be sworn to the faithful performance of their duties by the chairman of the selectmen or by a justice of the peace.

(As amended by Ch. 669, Acts of 1989)

ARTICLE 2

SECTION 18. *Appointment of Board of Youth and Recreation Commissioners.*

The town manager shall appoint a board of youth and recreation commissioners subject to the approval of the board of selectmen by majority vote, consisting of suitably qualified residents of the town of Saugus. Three persons shall be initially appointed for a term of three years, two persons for a term of two years, and two persons for a term of one year, and annually thereafter said town manager shall appoint a qualified resident of said town for a term of three years in the place of any commissioner whose term is to expire. The members of the board shall serve until their successors are qualified. If for any reason a vacancy occurs in the membership of the board, said town manager, with the approval of said board of selectmen by majority vote, shall fill the vacancy for the unexpired term.

Said board of youth and recreation commissioners is established for the purpose of carrying out programs including, but not limited to, those designed to meet the opportunities, challenges and problems of the youth of said town in conjunction with any similar or related programs of any agency of the commonwealth or any agency of the federal government.

Said board of youth and recreation commissioners may receive gifts or property, both real and personal, in the name of said town, subject to the approval of said board of selectmen. Such gifts shall be managed and controlled by said board.

Said board of youth and recreation commissioners shall organize for the proper conduct of its duties and shall possess all the powers and rights and be subject to all the duties and liabilities conferred or imposed by law upon the boards of youth and recreation commissioners of towns, but in the performance of its duties it shall be subject to the general supervision and direction of the town manager.

Commissioners shall be sworn to the faithful performance of their duties by the chairman of said board of selectmen or by a justice of the peace.

(As amended by Ch. 669, Acts of 1989 and Ch. 69, Acts of 1999)

ARTICLE 2

SECTION 19. *Appointment of Board of Cemetery Commissioners.* The board of selectmen shall appoint a board of cemetery commissioners to consist of 5 suitably qualified persons. One of the persons shall be appointed for a term of 1 year, 2 for a term of 2 years, and 2 for a term of 3 years; and annually thereafter there shall be appointed by the board of selectmen, a member for a term of 3 years in the place of the member whose term is to expire. The members shall serve until their successors are appointed and qualified. The current serving cemetery commission members shall complete their appointed terms. If for any reason a vacancy occurs in the membership of the board of cemetery commissioners, the vacancy shall be filled forthwith by the board of selectmen for the unexpired term. Upon the appointment and qualification of the members of the board of cemetery commissioners as provided in this section, the members of the then existing board of cemetery commissioners appointed hereunder shall organize for the proper conduct of their duties and shall possess all the powers and rights and be subject to all the duties and liabilities conferred or imposed by law upon boards of cemetery commissioners of towns, but in the performance of their duties they shall be subject to the general supervision and direction of the board of selectmen. They shall be sworn to the

faithful performance of their duties by the chairman of the board of selectmen or by a justice of the peace. (As amended by Ch. 477, Acts of 2002)

ARTICLE 2

SECTION 20. *Appointment of Chief of the Fire Department.* The town manager shall appoint a qualified person to be known as the chief of the fire department. The person so appointed shall possess all the powers and rights and be subject to all the duties and liabilities conferred or imposed by sections forty-two, forty-three and forty-four of chapter forty-eight of the General Laws or by any other applicable provision of law; provided, that in the performance of his duties, he shall be subject to the general supervision and direction of the town manager.

Nothing in this act shall affect the tenure of the incumbent of the office of chief of the Saugus fire department on the effective date of this act, who shall continue to serve in such office without interruption of civil service or other rights. Said incumbent shall be subject to the general supervision and direction of the town manager to the same extent, and shall have the same powers and duties, as though he had been appointed by him.

Upon the effective date of this act the board of fire engineers of the town of Saugus shall be abolished and the terms of office of the members thereof shall be terminated. (As amended by Ch. 28, Acts of 1971)

ARTICLE 2

SECTION 21. *Appointment of Board of Assessors.* The town manager shall appoint three suitably qualified persons as assessors. One of said persons shall be appointed for a term of one year, one for a term of two years, and one for a term of three years; and annually thereafter there shall be appointed by the town manager, an assessor for a term of three years in the place of the assessor whose term is to expire. The assessors shall serve until their successors are appointed and qualified. If for any reason a vacancy occurs in the membership of the board of assessors, the vacancy shall be filled forthwith by the town manager for the unexpired term. Upon the appointment and qualification of assessors as provided in this section the terms of office of the members of the then existing board of assessors of the town shall terminate. The assessors appointed hereunder shall organize for the proper conduct of their duties and shall possess all the powers and rights and be subject to all the duties and liabilities conferred or imposed by law upon assessors of towns, but in the performance of their duties they shall be subject to the general supervision and direction of the town manager. They shall be sworn to the faithful performance of their duties by the chairman of the selectmen or by a justice of the peace.

ARTICLE 2

SECTION 22. *Town Clerk.* The town manager shall appoint a suitably qualified person to the office of town clerk. The town clerk shall have the powers, perform the duties and be subject to the liabilities and penalties now or hereafter conferred or imposed by law upon town clerks. He shall be sworn to the faithful performance of his duties by the chairman of the selectmen or by a justice of the peace. The town clerk shall be subject to the general supervision and direction of the town manager in the performance of his duties. (As amended by Ch. 104, Acts of 1979 and Ch. 229, Acts of 1984)

ARTICLE 2

SECTION 23. *Town Treasurer.* The town manager shall appoint a suitably qualified person to the office of town treasurer. The town treasurer shall have the powers, perform the duties and be subject to the liabilities and penalties now or hereafter conferred or imposed by law upon town treasurers, but in the conduct of his office shall be subject to the supervision and direction of the town manager. Whenever it shall be necessary to execute any deed conveying land, or any other instrument required to carry into effect any vote of the town, the same shall be executed by the treasurer in behalf of the town unless the town shall vote otherwise. The town treasurer shall be sworn to the faithful performance of his duties by the town clerk or by a justice of the peace.

(As amended by Ch. 104, Acts of 1979)

ARTICLE 2

SECTION 24. *Town Collector.* The town manager shall appoint a suitably qualified person to the office of town collector. The collector shall have the powers, perform the duties and be subject to the liabilities and penalties now or hereafter conferred or imposed by law upon town collectors, except that in the performance of his duties he shall be subject to the general supervision and direction of the town manager. The town collector shall be sworn to the faithful performance of his duties by the town clerk or by a justice of the peace.

(As amended by Ch. 104, Acts of 1979)

ARTICLE 2

SECTION 25. *Town Accountant.* The town manager shall appoint a suitably qualified person to the office of town accountant. The town accountant in office when this act becomes effective shall continue in office, subject to the provisions of chapter thirty-one of the General Laws if applicable, but otherwise subject to removal by the town manager as provided herein. Except as otherwise provided in this act, the town accountant shall have the powers, perform the duties and be subject to the liabilities and penalties now or hereafter conferred or imposed by law upon town accountants but in the performance of his duties he shall be subject to the general supervision and direction of the town manager. The town accountant shall be sworn to the faithful performance of his duties by the town clerk or by a justice of the peace.

ARTICLE 2

SECTION 26. *Superintendent of Public Works.* The town manager shall appoint a suitably qualified person to the office of superintendent of public works. The superintendent of public works in office when this act becomes effective shall continue in office, subject to the provisions of chapter thirty-one of the General Laws, if applicable, but otherwise subject to removal by the town manager as provided herein. The superintendent of public works shall have the powers, perform the duties and be subject to the liabilities and penalties now or hereafter conferred or imposed by law upon any officer or officers having similar duties, but in the performance of his duties he shall be subject to the general supervision and direction of the town manager.

ARTICLE 2

SECTION 27. *Tree Warden.* The town manager shall appoint a suitably qualified person to the office of tree warden. The tree warden shall have the powers, perform the duties and be subject to the liabilities and penalties now or hereafter conferred or imposed by law upon tree wardens, but in the conduct of his office he shall be subject to the supervision and direction of the town manager. The tree warden shall be sworn to the faithful performance of his duties by the chairman of the selectmen or by the town clerk.

(As amended by Ch. 104, Acts of 1979)

LEGAL AFFAIRS.

ARTICLE 2

SECTION 28. *Appointment of Town Counsel.* The town manager shall annually appoint an attorney-at-law to act as town counsel, who shall draft all bonds, deeds, leases, obligations, conveyances and other legal instruments, and shall perform such other legal services as may be requested of him, by vote of the town, by the town manager, by the moderator, or by any board of town officers. Also, when so requested, he shall furnish a written opinion on any question that may be submitted to him, and shall at all times upon the request of the town manager furnish legal advice to any officer of the town who may require his advice upon any subject concerning the duties of such officer. He shall prosecute all suits or other legal proceedings ordered to be brought by the town or by the board of selectmen, and shall appear before the courts of the commonwealth in defense of all actions or suits brought against the town or its officers in their official capacity and shall try and argue any and all cases in which the town shall be a party or before any board of referees or commission and shall appear at any and all hearings on behalf of the town whenever his services may be required. The town counsel shall furnish a written opinion on the legality of all articles for the town warrant, annual or special, and said opinion shall be filed with the town clerk and distributed by the said clerk to town meeting members with the said warrant. *(As amended by Ch. 104, Acts of 1979)*

FISCAL AFFAIRS

ARTICLE 2

SECTION 29. *Approval of Warrants.* The town manager shall be the chief fiscal officer of the town. Warrants for the payment of town funds prepared by the town accountant in accordance with the provisions of section fifty-six of chapter forty-one of the General Laws shall be submitted to the town manager. The approval of any such warrant by the town manager shall be sufficient authority to authorize payment by the town treasurer, but the selectmen shall approve all warrants in the event of the absence of the town manager or a vacancy in the office of town manager.

ARTICLE 2

SECTION 30. *Investigation of Claims.* Whenever any payroll, bill or other claim against the town is presented to the town manager he shall, if the same seems to him to be of doubtful validity, excessive in amount, or otherwise contrary to the interests of the town, refer it to the selectmen who shall immediately investigate the facts and determine

what, if any, payment should be made. Pending such investigation and determination by the selectmen, payment shall be withheld.

ARTICLE 2

SECTION 31. *Receipts paid to Treasury.* Every officer shall pay into the treasury of the town all amounts received by him on behalf of the town, and shall make a true return thereof to the town accountant stating the accounts upon which such amounts were received.

ARTICLE 2

SECTION 32. *Fees paid to Treasury.* The aggregate annual compensation of each town employee appointed by the manager shall be limited to the amount established in accordance with the provisions of this act and all fees received in accordance with the provisions of any general or special law shall be paid into the treasury of the town.

ARTICLE 2

SECTION 33. *Certain Town Officers not to make Contracts with the Town.* It shall be unlawful for any selectman, the town manager, any member of the school committee, any trustee of the public library, or any other elective or appointive official, except as otherwise provided by this act or any other provision of law, directly or indirectly to make a contract with the town, or to receive any commission, discount, bonus, gift, contribution or reward from, or any share in the profits of, any person or corporation making or performing such a contract, unless the official concerned, immediately upon learning of the existence of such contract, or that such a contract is proposed, shall notify the selectmen in writing of the contract and of the nature of his interest therein and shall abstain from doing any official act on behalf of the town in reference thereto. In case such interest exists on the part of an officer whose duty it is to make such a contract on behalf of the town, the contract may be made by another officer or voter of the town duly authorized thereto by vote of the selectmen. Violation of any provision of this section shall render the contract in respect to which such violation occurs voidable at the option of the town. Any person violating any provision of this section shall be punished by a fine of not more than one thousand dollars, or by imprisonment for not more than one year, or by both such fine and imprisonment.

ARTICLE 2

SECTION 34. *Estimates of Expenditures.* On or before the fifteenth day of February of each year, the town manager shall submit to the selectmen a careful, detailed estimate in writing of the probable expenditures of the town government for the ensuing fiscal year, stating the amount required to meet the interest and maturing bonds and notes or other outstanding indebtedness of the town, and showing specifically the amount necessary to be provided for each fund and department, together with a statement of the expenditures of the town for the same purposes in the two preceding years and an estimate of the expenditures for the current year. He shall also submit a statement showing all revenues received by the town in the two preceding fiscal years together with an estimate of the receipts of the current year and an estimate of the amount of income from all sources of revenue exclusive of taxes upon property in the ensuing year. He shall

report the probable amount required to be levied and raised by taxation to defray all expenses and liabilities of the town together with an estimate of the tax rate necessary to raise said amount. For the purpose of enabling the town manager to make up the annual estimate of expenditures, all boards, officers, and committees of the town shall, upon his written request, furnish all information in their possession and submit to him in writing a detailed estimate of the appropriations required for the efficient and proper conduct of their respective departments during the next fiscal year.

(As amended by Ch. 142, Acts of 1984 and Ch. 123, Acts of 1993)

ARTICLE 2

SECTION 35. Annual Budget. The selectmen shall consider the tentative budget submitted by the town manager and make such recommendations relative thereto as they deem expedient and proper in the interests of the town. On or before the first day of March of each year the selectmen shall transmit a copy of the budget together with their recommendations relative thereto to each member of the finance committee.

(As amended by Ch. 139, Acts of 1984 and Ch. 123, Acts of 1993)

ARTICLE 2

SECTION 35A. School Budget. On or before the 1st day of February the School Committee shall submit to the Board of Selectmen and the Town Manager a detailed budget for the ensuing fiscal year.

(As amended by Ch 99, Acts of 2011)

ARTICLE 2

SECTION 35B. ANNUAL TOWN AUDIT

The Board of Selectmen will be responsible to hire the auditing firm to conduct the state mandated annual independent audit for the Town of Saugus.

As part of the process to procure services, the Selectmen should determine in advance the requirements and objective of the audit along with monitoring the progress of the audit. The audit should have (3) components including an opinion, followed by financial statements, and a separately provided management letter.

The results of the audit will immediately be provided to the Board of Selectmen, the Finance Committee and the Town Manager. It will be the responsibility of the Town Manager to address any concerns raised by the audit in a timely manner.

(As amended by Chapter 295 Acts of 2012)

FINANCE COMMITTEE.

ARTICLE 2

SECTION 36. Appointment of Finance Committee. There shall be a finance committee consisting of nine registered voters of the town. No elective or appointive town officer or town employee except a town meeting member shall be eligible to serve on said committee. The moderator elected under the provisions of this act in the year nineteen hundred and forty-eight shall forthwith appoint three members of the finance committee for terms of one year, three members for terms of two years, and three members for terms of three years. At each annual town meeting thereafter the moderator

shall appoint three members of said committee for terms of three years. The terms of office of said members shall commence immediately upon their qualification and shall expire at the final adjournment of the annual town meeting at which their successors are appointed. Said committee shall choose its own officers and shall serve without pay. It shall cause to be kept a true record of its proceedings. Upon the appointment and qualification of a finance committee as provided herein the terms of office of all members of the then existing committee shall terminate.

ARTICLE 2

SECTION 37. *Appointments to fill Vacancies.* The moderator shall fill any vacancy in said committee, and upon doing so shall notify the secretary of the committee and the town clerk of his action in writing. The term of office of any person so chosen to fill a vacancy shall expire at the final adjournment of the next succeeding annual town meeting, and the moderator shall appoint a successor to complete the unexpired term of the member in whose office such vacancy originally occurred.

(As amended by Ch. 144, Acts of 1954)

ARTICLE 2

SECTION 38. *Consideration of Town Warrant.* All articles in any warrant for a town meeting except articles providing for election of town officers and town meeting members and except zoning articles shall be referred to the finance committee for its consideration. The selectmen after drawing any such warrant shall transmit immediately a copy thereof to each member of said committee. A public hearing shall be held at least ten days before the annual town meeting upon all such articles in the warrant for such meeting and a notice of such hearing shall be given by posting a copy thereof in at least three public places in the town not less than three days before the time of holding such hearing. The finance committee may hold a public hearing on any or all articles in the warrant for a special town meeting. Notice of such hearing shall be given by posting a copy thereof in at least three public places in the town not less than three days before the time of holding such hearing. Said committee, after due consideration of the subject matter of such articles in any warrant, shall report thereon to the town meeting, in writing, such recommendations as it deems best for the interests of the town and its citizens. The report of the finance committee on such articles in the warrant for any annual meeting shall be filed with the town clerk not later than the third Monday of April and the town clerk shall forthwith cause said report to be printed and a copy thereof to be distributed prior to said meeting to each household in the town. The report of the finance committee together with the annual budget for the subsequent fiscal year shall be transmitted to each member of the town meeting not later than the third Monday of April.

(As amended by Ch. 141, Acts of 1984 and Ch. 26, Acts of 1994)

ARTICLE 2

SECTION 39. *Recommendations by Committee.* It shall be the duty of the finance committee annually to consider the expenditures in previous years and the estimated requirements for the ensuing year as set forth in the budget submitted to them by the selectmen. The finance committee shall add to the statement of expenditures and

estimates in the annual budget another column, giving the amounts which in its opinion should be appropriated for the ensuing year, and shall further add thereto such explanations and suggestions relating to the proposed appropriations as it may deem expedient, and report thereon as provided in section thirty-eight.

ARTICLE 2

SECTION 40. *Free Access to Financial Data.* In the discharge of its duty, said committee shall have free access to all books of records and accounts, bills and vouchers on which money has been or may be paid from the town treasury. Officers, boards and committees of the town shall, upon request, furnish said committee with facts, figures and any other information pertaining to their several activities.

ARTICLE 2

SECTION 41. *Annual Report.* It shall be the duty of the finance committee to make an annual report of its doings, with recommendations relative to financial matters and the conduct of town business, which shall be included in the annual town report.

REMOVAL.

ARTICLE 2

SECTION 42. *Holder of an Elective Office may be Removed.* Any holder of an elective office, except a town meeting member, may be removed therefrom by the registered voters of the town as herein provided. (As amended by Ch. 104, Acts of 1979)

ARTICLE 2

SECTION 43. *Removal Petition, Preparation, Filing.* Any fifty registered voters of the town may file with the town clerk a declaration of intent containing the name of the officer sought to be removed from office. The town clerk shall, within five working days, deliver to said voters making the declaration of intent, copies of petition blanks demanding such removal, printed forms of which he shall make available. The blanks shall be issued by the town clerk with his signature and official seal attached thereto. They shall be dated, addressed to the selectmen and shall contain the names of the fifty persons to whom they are issued, the name of the person whose removal is sought and shall demand the election of a successor in the said office. A copy of the petition shall be entered in a record book to be kept in the office of the town clerk. The removal petitions shall be returned and filed with the town clerk within twenty-five days after the filing of the declaration of intent and shall have been signed by at least twenty-five per cent of the registered voters of the town, who shall add to their signatures the street and number, if any, of their residences. The town clerk shall immediately submit the petitions to the registrars of voters of the town and the registrars shall forthwith certify thereon the number of signatures which are names of registered voters of the town.

(As amended by Ch. 104, Acts of 1979)

ARTICLE 2

SECTION 44. *Removal and Election.* If the petition shall be found and certified by the town clerk to be sufficient, he shall submit the same with his certificate to the selectmen immediately, and the selectmen shall, within five days, give written notice of the receipt of the certificate to the officer sought to be removed and shall thereupon order an election to be held on a Tuesday fixed by them, not less than twenty-five nor more than thirty-five days after the date of the town clerk's certificate that a sufficient petition is filed; provided, however, that if any other town election is to occur within one hundred and twenty days after the certificate, the selectmen shall postpone the holding of the removal election to the date of such other election. If a vacancy occurs in said office after a removal election has been ordered, the election shall nevertheless proceed as provided in this act. Any number of officers may stand for removal at the same election.

(As amended by Ch. 104, Acts of 1979)

ARTICLE 2

SECTION 45. *Nomination of Candidates.* The question of recalling any number of officers may be submitted at the same election. But as to each officer whose recall is sought there shall be a separate ballot. The nomination of candidates to succeed an officer whose recall is sought, the publication of the warrant for the recall election, and the conduct of such election, shall all be in accordance with the provisions of the General Laws, with the exception of chapter fifty-four A. *(As amended by Ch. 79, Acts of 1951)*

ARTICLE 2

SECTION 46. *Ballots.* Ballots used in a recall election shall submit the following propositions in the order indicated:

For the recall of (name of officer).

Against the recall of (name of officer).

Immediately at the right of each proposition there shall be a square in which the voter, by making a cross mark (X), may vote for either of the said propositions.

(As amended by Ch. 79, Acts of 1951)

ARTICLE 2

SECTION 47. *Election.* This section is repealed.

(As amended by Ch. 79, Acts of 1951 and Ch. 104, Acts of 1979)

ARTICLE 2

SECTION 48. *Election in Event of Resignation.* If an office in regard to which a sufficient recall petition is filed becomes vacant before the ballots are printed, the election shall be held as hereinbefore provided, except that the title of the ballot shall be "Town Election", that the propositions in regard to the recall shall be omitted from the ballot, and that above the names of the candidates there shall appear on the ballot the words "Candidates to succeed (name of officer) resigned". (If he resigned his office).

ARTICLE 2

SECTION 49. *Subsequent Removal.* No removal petition shall be filed against an officer within three months after he takes office, nor in the case of an officer subjected to a removal election and not removed thereby, until at least three months after the election in which his removal was submitted to the voters of the town.

(As amended by Ch. 104, Acts of 1979)

ARTICLE 2

SECTION 50. *Person Recalled not to be Appointed to Any Town Office within Two Years.* No person who has been recalled from an office, or who has resigned from office while recall proceedings were pending against him, shall be appointed to any town office within two years after such recall or such resignation.

ARTICLE 2

SECTION 51. *Duties of Certain Town Officials relative to Election.* It shall be the duty of the selectmen and the town clerk in office and any other town official upon whom by reason of his office a duty devolves under the provisions of this act, when this act is accepted by the registered voters as herein provided, to comply with all the requirements of law relating to elections, to the end that all things may be done necessary for the nomination and election of the officers first to be elected under this act.

Approved January 30, 1947.

ARTICLE 2

SECTION 51A. *Capital Improvement Plan.* The Board of Selectmen and the Town Manager shall be responsible for preparing a 5-year capital improvement plan for the Town of Saugus, which shall be updated annually. The school committee shall provide input to the board of selectmen and the town manager relative to such plan. Such plan shall include, but not be limited to, cost estimates, methods of financing, recommended time frames and such other information as requested by the board of selectmen or the town manager.

(As amended by Ch 99 Acts of 2011)

APPENDIX I

ABBREVIATED CHRONOLOGY OF LEGISLATIVE ACTS AND AMENDMENTS

1928. Chapter 55, Acts of 1928. Adopt representative town meeting.
1929. No amendments.
1930. No amendments.
1931. No amendments.
1932. No amendments.
1933. Chapter 248, Acts of 1933. Amendment to Chapter 55, Acts of 1928.
1934. No amendments.
1935. No amendments.
1936. No amendments.
1937. No amendments.
1938. No amendments.
1939. No amendments.
1940. No legislative session this year.
1941. Chapter 367, Acts of 1941. Amendment to Chapter 55, Acts of 1928.
1942. No regular legislative session, only a special session related to war issues.
1943. No amendments.
1944. No regular legislative session, only a special session related to war issues.
1945. No amendments.
1946. No amendments.
1947. Chapter 17, Acts of 1947. Act changing representative town meeting and creating a town manager form of government. (Original Charter)
Chapter 341, Acts of 1947. Act requiring submission of Chapter 17 to town voters.

1948. No amendments.

1949. No amendments.

1950. No amendments.

1951. Chapter 79, Acts of 1951. Amendment to Chapter 17, Acts of 1947,
Chapter 606, Acts of 1951. Amendment to Chapter 17, Acts of 1947.

1952. Chapter 199, Acts of 1952. Amendment to Chapter 17, Acts of 1947.

1953. Chapter 34, Acts of 1953. Amendment to Chapter 55, Acts of 1928.

1954. Chapter 144, Acts of 1954. Amendment to Chapter 17, Acts of 1947.

1955. No amendments.

1956. No amendments.

1957. No amendments.

1958. No amendments.

1959. No amendments.

1960. No amendments.

1961. No amendments.

1962. No amendments.

1963. No amendments.

1964. No amendments.

1965. No amendments.

1966. No amendments.

1967. No amendments.

1968. No amendments.

1969. No amendments.

1970. No amendments.

1971. Chapter 28, Acts of 1971. Amendment to Chapter 17, Acts of 1947.

1972. No amendments.

1973. No amendments.

1974. No amendments.

1975. Chapter 625, Acts of 1975. Listing of names on town election ballots.

1976. Chapter 23, Acts of 1976. Amendment to Chapter 55, Acts of 1928.

1977. No amendments.

1978. No amendments.

1979. Chapter 104, Acts of 1979. Amendments to Chapter 17, Acts of 1947.

1980. No amendments.

1981. Chapter 545, Acts of 1981. Amendment to Chapter 17, Acts of 1947.

1982. Chapter 395, Acts of 1982. Amendment to Chapter 17, Acts of 1947.

1983. No amendments.

1984. Chapter 134, Acts of 1984. Amendment to Chapter 55, Acts of 1928.

Chapter 139, Acts of 1984. Amendment to Chapter 17, Acts of 1947.

Chapter 140, Acts of 1984. Amendment to Chapter 17, Acts of 1947.

Chapter 141, Acts of 1984. Amendment to Chapter 17, Acts of 1947.

Chapter 142, Acts of 1984. Amendment to Chapter 17, Acts of 1947.

Chapter 143, Acts of 1984. Amendment to Chapter 17, Acts of 1947.

Chapter 203, Acts of 1984. Amendment to Chapter 17, Acts of 1947.

Chapter 229, Acts of 1984. Amendment to Chapter 17, Acts of 1947.

1985. No amendments.

1986. Chapter 528, Acts of 1986. Amendment to Chapter 17, Acts of 1947.

1987. No amendments.

1988. No amendments.

1989. Chapter 669, Acts of 1989. Amendments to Chapter 17, Acts of 1947.

1990. No amendments.

1991. No amendments.

1992. No amendments.

1993. Chapter 123, Acts of 1993. Amendment to Chapter 17, Acts of 1947.

1994. Chapter 26, Acts of 1994. Amendment to Chapter 17, Acts of 1947.
Chapter 27, Acts of 1994. Amendment to Chapter 17, Acts of 1947.

1995. No amendments.

1996. No amendments.

1997. No amendments.

1998. No amendments.

1999. Chapter 69, Acts of 1999. Amendment to Chapter 17, Acts of 1947.

2000. Chapter 350, Acts of 2000. Amendment to Chapter 55, Acts of 1928.

2001. No amendments.

2002. Chapter 477, Acts of 2002. Amendments to Chapter 17, Acts of 1947.

2003. No amendments.

2004. No amendments.

2005. No amendments.

2006. No amendments.

2007. No amendments

2008. No amendments

2009. No amendments

2010. No amendments

2011. Chapter 99, Acts of 2011. Amendments to Chapter 17, Acts of 1947.

2012. Chapter 295, Acts of 2012. Amendments to Chapter 17, Acts of 1947.

2013. Chapter 51, Acts of 2013. Amendments to Chapter 17, Acts of 1947.

Agenda Items for Meeting with Chair and Vice Chair of Saugus School Committee

- Investigation is finished and it will be approximately 1 month for the report and recommendations.
- HS principal growth update

April 13 , 2023

- Athletic eligibility change in the handbook
 - Handbook changes - ASAP
 - MS/HS Failure - lets focus on the “Failure” not the percentage
- Proposals for the SSSRF
 - Summer School
 - Tutors to support academic growth in general education classroom
- Investigation update - Arbitration quote/invoice
- School Committee [Agenda](#) Prep
- Staffing update
 - Post Confidential Secretary - Family Resource Center position (shift from confidential secretary to the Deputy Superintendent to the Superintendent)
 - Update on Educator Investigations/findings
 - Transition Plan - we need to identify time for the Senior Leadership team to meet and discussion the transition of my work priorities and tasks to other members of the team

Affidavit of Chi Tschang

I, Chi Tschang, hereby depose and state as follows:

1. I provide consulting services to school districts and systems through Excellence Relay Consulting.
2. The Saugus Public Schools contracted with me in or around August, 2022, to provide professional development consulting services.
3. My proposed language, adopted in the Saugus Public Schools contract, required payment to me of \$300 per hour (not including travel), which I intended to mean that my expenses associated with travel to Saugus to deliver the services were above and beyond my hourly rate.
4. After entering into the contract, my primary points of contact with Saugus Public Schools were Margo Ferrick, the Deputy Superintendent, and Pola Andrews, Executive Director of Finance and Administration with regard to my invoices.
5. I submitted my first invoice to Saugus Public Schools at the end of September, 2022 for five hours of services provided over three dates in September plus expenses associated with travel. The total amount of the invoice was \$2,272.25.
6. I was thereafter contacted by Dr. Ferrick via email on October 1, 2022. Her email, in full, with no one else copied, stated:

Hi Chi

Invoice #1 needs to be written as a daily rate of \$2272.25. Please don't break it down by specific costs.

Please email the updated version.

Thank You

A copy of this email is attached as Exhibit A.

7. I understood from my oral communications with Dr. Ferrick that my invoices needed to be presented in a certain format. As long as I was not being paid for work or expenses not actually incurred, I was willing to cooperate with the client to present my invoices in the format they required.
8. As requested by Dr. Ferrick, I submitted a revised invoice reflecting the total amount as a “day rate.” A copy of the original invoice, and the revised invoice as Ms. Ferrick requested, is attached at Exhibit B.
9. In October, I submitted two invoices, an itemized invoice showing all expenses associated with travel and my recorded hours at my hourly rate, as well as a lump sum invoice including expenses. The total in fees and expenses was \$11,361.24. I submitted two invoices in hopes that this would satisfy the requirements of Saugus Public Schools, while also wishing to be transparent about the time and expenses behind the charge. A copy of these invoices is attached at Exhibit C. I note that when I submitted the summarized invoice, I made a typographical error and entered the amount as \$11,361.64 instead of \$11,361.24.
10. As was my custom, the detailed invoice included receipts for all expenses. One dinner receipt included \$13 for two glasses of wine with dinner which I had intended to deduct from my bill, reducing the amount for that dinner from \$58.86 to \$45.86 but in error I reduced the amount to \$55.86. It was never my intention to bill Saugus Public Schools for the \$13, as the reduction on my itemized invoice demonstrates, and I did not reduce this expense sufficiently in error.
11. Dr. Ferrick and I subsequently spoke about my October invoice in two formats, and she directed me to revise my invoice, again, to ensure that the total hours covered the

full amount of my bill. I did so, at her direction, by increasing the hours to 38 while the total of the invoice remained the same. A copy of this invoice is attached as Exhibit D.

12. Ms. McMahon was not part of this discussion. I did not understand this to come from Ms. McMahon but, again, to be a particular requirement of Saugus Public Schools.

13. I submitted my November 2022 billing as I do for all my clients, with full detail, including my hours and expenses associated with travel and back-up receipts. A copy of the original invoice is attached as Exhibit E.

14. While Ms. McMahon and I had not discussed the prior two invoices, which were revised at the direction of Dr. Ferrick, after I submitted this bill I received an email from Ms. McMahon requesting me to resubmit for 28 hours, rather than 24.

15. I remembered Dr. Ferrick had instructed me to resubmit my invoice this way the prior month, and I presumed this was to be consistent with Dr. Ferrick's prior direction.

16. I then resubmitted my invoice, with the same total amount from my detailed invoice, reflected as 28 hours. A copy of this revised invoice is attached as Exhibit F.

17. I submitted my invoice for December hours at the end of the month. This was planning work and there was no travel and so no expenses.

18. My timesheet reflects I worked an additional two hours for Saugus Public Schools on January 3, 2023, and then, as I recall, my services were coming to an end. As a result, rather than bill Saugus Public Schools at the end of January for these two hours, I sent a revised invoice for my December and January time, totaling 7.5 hours, on January 4, 2023. Although I did not state on this invoice it covered January 3, 2023, I can see

from my time record that it did. A copy of the final invoice for December and January 2023 time is attached as Exhibit G.

19. My invoices at all times reflected actual time worked and actual expenses incurred to provide services to Saugus Public Schools, which I understood to be authorized under my contract with Saugus Public Schools.

20. I did not intend to bill Saugus Public Schools for \$13 for two glasses of wine consistent with my practice for other clients as well but reduced the expense by \$3 instead of \$13 incorrectly on my detailed invoice in error. I stand ready to return the \$10 I never intended to be reimbursed to Saugus Public Schools.

21. I hope this provides helpful context to the reason why multiple iterations of my invoices exist within the files of Saugus Public Schools.

22. I have never been contacted by the Saugus School Committee or any representative for that Committee, or the Town of Saugus or any agent of the Town, to answer any questions about my work for the Town or my invoices. At all times I endeavored to provide Saugus Public Schools with invoices that met their own particular requirements.

9/28/2023

SIGNED UNDER THE PENALTIES OF PERJURY ON THIS ___ OF SEPTEMBER, 2023.

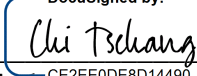
DocuSigned by:

CE2EE0DE8D14490...
Chi Tschang

EXHIBIT A

From: Margo Ferrick <mferrick@saugus.k12.ma.us>
Sent: Friday, October 14, 2022 1:22 PM
To: Chi Tschang
Subject: revised invoice please

Hi Chi

Invoice #1 needs to be written as a daily rate of \$2272.25. Please don't break it down by specific costs.

Please email the updated version.

Thank You

--

Margo Ferrick, MSW, EdD
Deputy Superintendent
Saugus Public Schools
(781) 820-9880

EXHIBIT B

Invoice #	1
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang
639 4th Ave. #7A
Brooklyn, NY 11232
917-280-4517
chi@excellencereflex.com

Date of Invoice:

September 30, 2022

Bill to

Erin McMahon
Saugus Public Schools

For

September work

#	DESCRIPTION	AMOUNT
1	Reimbursement: Delta Flight from NY to Boston, 10/4-5	\$422.20
2	Reimbursement: Holiday Inn Express, Boston, 10/4	\$200.05
3	Consulting Fee: 5.5 hours on 9/9, 9/13 and 9/27	\$1,650.00
	SUBTOTAL	\$2,272.25
	TAX RATE	0.00%
	OTHER	\$0.00
	TOTAL	\$2,272.25
Please make all checks payable to Excellence Reflex Consulting. If you have any questions concerning this invoice, contact Chi Tschang at 917-280-4517 or chi@excellencereflex.com		

THANK YOU FOR YOUR BUSINESS!

10:43   

< FLIGHT DETAILS

LGA ▶ BOS

Confirmation# GUERXH
Purchased Tue, Sep 27, 2022



FLIGHT INFO	
YX5616: LGA ▶ BOS	
DATE	10/04/2022
STATUS	OPEN
CABIN	I
YX5854: BOS ▶ LGA	
DATE	10/05/2022
STATUS	OPEN
CABIN	Z
KEY OF TERMS	

CHI TSCHANG 9296637839	
FLIGHT TICKET #	0062340628982
FARE	\$365.58 USD
TAXES, FEES, AND CHARGES	\$56.62 USD
FLIGHT TOTAL	\$422.20 USD
PAID WITH AMERICAN EXPRESS ENDING IN 1003	
▼ TAXES/FEES DETAIL ▼	

[TERMS AND CONDITIONS >](#)

Booking details

Holiday Inn Express Saugus (Logan Airport), an IHG Hotel

999 Broadway, Saugus, MA, 01906 United States of America

Check-in: Oct 4, 2022

Check-out: Oct 5, 2022

1 room x 1 night

Standard Room, 1 King Bed (LEISURE)

Booked for: Chi Tschang

Payment details

Room price

Tue, Oct 4 \$179.10

Taxes \$20.95

Total **\$200.05**

Paid
[AmericanExpress 1003]

Invoice #	1
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang
 639 4th Ave. #7A
 Brooklyn, NY 11232
 917-280-4517
chi@excellencereflex.com

Date of Invoice:

September 30, 2022

Bill to

Erin McMahon
 Saugus Public Schools

For

September work

#	DESCRIPTION	AMOUNT
1	Consulting fee: \$2,272.25 daily rate	\$2,272.25
2		
3		
	SUBTOTAL	\$2,272.25
	TAX RATE	0.00%
	OTHER	\$0.00
	TOTAL	\$2,272.25

Please make all checks payable to Excellence Reflex Consulting. If you have any questions concerning this invoice, contact Chi Tschang at 917-280-4517 or chi@excellencereflex.com

THANK YOU FOR YOUR BUSINESS!

10:43   

< FLIGHT DETAILS



LGA > BOS

Confirmation# GUERXH
Purchased Tue, Sep 27, 2022

Booking details

Holiday Inn Express Saugus (Logan Airport), an IHG Hotel

999 Broadway, Saugus, MA, 01906 United States of America
Check-in: Oct 4, 2022
Check-out: Oct 5, 2022
1 room x 1 night

Standard Room, 1 King Bed (LEISURE)

Booked for: Chi Tschang

Payment details

Room price
Tue, Oct 4 \$179.10

Taxes
\$20.95

Total **\$200.05**
Paid [AmericanExpress 1003]

FLIGHT INFO	
YX5616: LGA > BOS	
DATE	10/04/2022
STATUS	OPEN
CABIN	I
YX5854: BOS > LGA	
DATE	10/05/2022
STATUS	OPEN
CABIN	Z
KEY OF TERMS	

CHI TSCHANG 9296637839	
FLIGHT TICKET #	0062340628982
FARE	\$365.58 USD
TAXES, FEES, AND CHARGES	\$56.62 USD
FLIGHT TOTAL	\$422.20 USD
PAID WITH AMERICAN EXPRESS ENDING IN 1003	
▼ TAXES/FEES DETAIL ▼	

TERMS AND CONDITIONS >

EXHIBIT C

Invoice #	2
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang

639 4th Ave. #7A

Brooklyn, NY 11232

917-280-4517

chi@excellencereflex.com

Date of Invoice:

October 31, 2022

Bill to

Erin McMahon
Saugus Public Schools

For

October work

#	DESCRIPTION	AMOUNT	Receipts?
1	Reimbursement: Dinner at the Line Sports Grill, 10/4	\$50.57	Yes
2	Reimbursement: Uber from LOG to hotel, 10/4	\$55.77	Yes
3	Reimbursement: Uber from hotel to Saugus Middle/High, 10/5	\$10.50	Yes
4	Reimbursement: Uber from Belmonte STEAM to Logan, 10/5	\$23.40	Yes
5	Reimbursement: Dinner at Alta Strada, 10/5	\$4.28	Yes
6	Reimbursement: Parking at Laguardia airport, 10/4-10/5	\$140.00	Yes
7	Reimbursement: United Flight from LGA to ORD to BOS to LGA	\$465.10	Yes
8	Reimbursement: Parking at LGA (10/27-10/28)	\$90.00	Yes
9	Reimbursement: Hotels.com for 10/26-27	\$696.32	Yes
10	Reimbursement: Flight from Nashville to Boston, 11/1-2	\$589.20	Yes
11	Reimbursement: Park car at LGA, 11/1-2	\$108.00	Yes
12	Reimbursement: Holiday Inn Express Saugus, 11/1-2	\$141.47	Yes
13	Reimbursement: Staples copies for PD and shipping to Saugus, 10/23	\$268.43	Yes
14	Reimbursement: Dinner at Santarpio's, 10/27	\$55.36	Yes
15	Reimbursement: Uber from hotel to Saugus Middle/High, 10/27	\$26.40	Yes

16	Reimbursement: Uber from Saugus High to hotel, 10/27	\$28.44	Yes
17	Reimbursement: Purchase of water from hotel, 10/27	\$8.00	Yes
18	including full day site visit), 10/17 (0.5 hr), 10/19 (1 hr), 10/21 (0.5 hrs), 10/22 (1 hr), 10/23 (2 hrs), 10/27 (8 hrs including two	\$8,600.00	
	SUBTOTAL	\$11,361.24	
	TAX RATE	0.00%	
	OTHER	\$0.00	
	TOTAL	\$11,361.24	
Please make all checks payable to Excellence Reflex Consulting. If you have any questions concerning this invoice, contact Chi Tschang at 917-280-4517 or chi@excellencereflex.com			

THANK YOU FOR YOUR BUSINESS!

The Line Sports Grill

LGA F

Order number: 221004015001103

Order location: The Line Sports Grill

Order time: October 4th, 2022, 07:24 PM EDT

Payment methods: AMEX

Your receipt

1 Diet Coke \$4.85

1 Essex Burger \$19.99

Medium

No cheese

1 Iceberg Wedge \$15.99

Item subtotal: \$40.83

Sales tax: \$3.62

Tip: \$6.12

Total: \$50.57

Total

\$55.77

Trip fare	\$49.38
-----------	---------

Subtotal	\$49.38
----------	---------

Booking Fee <input type="checkbox"/>	\$2.69
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

Total

\$10.50

Trip fare \$8.64

Subtotal \$8.64

Booking Fee \$1.41

Temporary Fuel Surcharge \$0.45

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip.
You will receive a trip receipt when the payment is processed with payment information.

You rode with Robson

Total**\$23.40**

Trip fare	\$17.28
-----------	---------

Subtotal	\$17.28
----------	---------

Booking Fee <input type="checkbox"/>	\$2.42
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with JAMES

 4.93 Rating Has passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

Alta Strada
Boston Logan International Airport

495314 William V

CHK 22624
10/5/2022 5:47 PM

Dine In

1 Pure Leaf Lemon Tea BTL

18.5oz 4.00

AMEX \$4.28

XXXXXXXXXXXX1003

Check Tax \$0.00

Beverages NA \$4.00

Tax \$0.28

Payment \$4.28

Change Due \$0.00

----- Check Closed -----

10/5/2022 5:47 PM

LAGUARDIA AIRPORT
TERMINAL CD PARKING

EXIT LANE NO.:	402
RECEIPT:	131172
CASHIER:	0
TRANSACTION:	52013
SNR:	01 403 0341506
ENTRY:	10.04.22 18:55
PAID AT:	10.05.22 23:08
TICKET TYPE:	TRANSIENT TICKE T
FEE:	140.00 USD
PAID:	140.00 USD

TOTAL:	140.00 USD

CAR: HUC7699
 STAY 1D 4:13
 CARDHOLDER COPY

MID	*****
TERM	*****0439
10/05/22	23:09
TRAN 052013	
CARD1003
AMERICAN EXPRESS	
ICC	
SALE CREDIT	
AID	A000000025010801
TC	73CB00A25BA75EA7
AUTH CODE	897377
AMOUNT	\$140.00
TOTAL	\$140.00

No Cardholder
 verification

Ticket #: 0062344725332

Place of Issue:

Issue Date: 19OCT22

Expiration Date: 31DEC23

METHOD OF PAYMENT	
AX*****2001	\$930.20 USD

CHARGES	
Air Transportation Charges	
Base Fare	\$829.78 USD
Taxes, Fees and Charges	
United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY)	\$11.20 USD
United States - Transportation Tax (US)	\$62.22 USD
United States - Passenger Facility Charge (XF)	\$13.50 USD
United States - Flight Segment Tax (ZP)	\$13.50 USD
TICKET AMOUNT	\$930.20 USD

Checked Bag Allowance

The fees below are based on your original ticket purchase. If you qualify for free or discounted checked baggage, this will be taken into account when you check in. Visit delta.com for details on baggage embargoes that may apply to your itinerary.

Thank you for booking official on-airport parking at LaGuardia Airport
DocuSign Envelope ID: C818C840-765B-43AF-8F49-6944A7B3A7D2

Your booking confirmation email will be with you shortly

Booking Reference: LGAC439243

Entry: 5:00 PM - 10/24/2022

Booking Date: 3:01 PM 10/19/2022

Exit: 3:00 PM - 10/28/2022

Parking Lot: Terminal C Standard

Email: chitschang@gmail.com

Total **\$180.00**

Directions to Terminal C Parking can be found [here](#).

Please also note effective Saturday, June 4th, there will be a new Terminal C walkway with direct access into the terminal from Level 5 of the parking structure.

[Home](#)

[Manage Booking](#)

Pricing and rewards

Pricing

Room price

Wed, Oct 26	\$298.99
Thu, Oct 27	\$298.99
Taxes	\$98.34

Total **\$696.32**
Pay at property

[See fee information](#)

[Chat with virtual agent](#)

Nashville, TN ▶ Boston, MA

Passenger Information

CHI TSCHANG

SkyMiles#: 9296637839

Confirmation Number: G05KBR

Ticket Number: 0062344411445

Flight

DATE AND FLIGHT	STATUS	CLASS	SEAT/CABIN
BNA ▶ BOS Tue 01Nov2022 DL 2254	OPEN	W	11A
BOS ▶ BNA Wed 02Nov2022 YX 5743	OPEN	W	

Detailed Charges

Air Transportation Charges

Base Fare: \$520.94 USD

Taxes, Fees and Charges

United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY)	\$11.20 USD
United States - Transportation Tax (US)	\$39.06 USD
United States - Passenger Facility Charge (XF)	\$9.00 USD
United States - Flight Segment Tax (ZP)	\$9.00 USD
Total Price:	\$589.20 USD

Paid with American Express ending 2001 \$589.20 USD

[View Terms and Conditions](#)

Thank you for booking [Terminal C airport parking at LaGuardia Airport](#).

Your booking confirmation email will be with you shortly

Booking Reference: LGAC440014

Entry: 3:30 PM - 10/30/2022

Booking Date: 11:17 AM 10/21/2022

Exit: 11:30 PM - 11/04/2022

Parking Lot: Terminal C Standard

Email: chitschang@gmail.com

Total **\$270.00**

Directions to Terminal C Parking can be found [here](#).

Please also note effective Saturday, June 4th, there will be a new Terminal C walkway with direct access into the terminal from Level 5 of the parking structure.

Pricing and rewards

Pricing

Room price

Tue, Nov 1

\$126.65

Taxes

\$14.82

Total

\$141.47

Pay at property

Connect

348 4th Avenue
 Brooklyn, NY 11215
 718-222-5732

Sale

Store: 957 Register: 5
 Date: 10/23/22 Time: 12:52 PM
 Transaction: 20643 Cashier: 2039988

Qty	Item	Price	Amount
1	ASTOBRGHT 300 CT. 759598916421	14.99	14.99
	Subtotal		14.99
	NEW YORK 8.875%		1.33
	Total		16.32

AMERICAN EXPRESS USD\$16.32
 Card No. : XXXXXXXXXXXX2001 [C]
 Chip Read
 Auth No. : 803143
 AID.: A000000025010801

Staples Connect,
 the working and learning store.
 Discover every tool to take on tomorrow
 including products, services
 and inspiration that help you
 unlock what is possible.

Shop Smarter. Get Rewarded.
 Staples Rewards members get up to

348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 1:37 PM
Transaction: 20648 Cashier: 2039988

Qty	Item	Price	Amount
1	SPLS BINDER CLIP M 718103151078	3.99	3.99

Subtotal	3.99
NEW YORK 8.875%	0.35

Total 4.34

AMERICAN EXPRESS USD\$4.34
Card No. : XXXXXXXXXXXX2001 [C]
Chip Read
Auth No. : 860477
AID.: A000000025010801

Staples Connect,
the working and learning store.
Discover every tool to take on tomorrow
including products, services
and inspiration that help you
unlock what is possible.

Shop Smarter. Get Rewarded.
Staples Rewards members get up to
5% back in Rewards.
Exclusions Apply. See an associate for

**Staples
Connect**

348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 1:57 PM
Transaction: 20649 Cashier: 2039988

Qty	Item	Price	Amount
	STAPLES 3/16 BUBBL		
1	718103380256	7.49	7.49
	12X9X9 RECTANGLE B		
1	718103422178	1.99	1.99
	SPLS BINDER CLIP M		
1	718103151139	3.99	3.99

Subtotal 13.47
NEW YORK 8.875% 1.20

Total 14.67

AMERICAN EXPRESS USD\$14.67

Card No. : XXXXXXXXXXXXX2001 [C]

Chip Read

Auth No. : 882949

AID.: A000000025010801

Staples Connect,

348 4th Ave
348 4TH BROOKLYN, NY 11215
(718) 222-5732

SALE 0 26 026 47348
957 10/23/22 12:52
QTY SKU PRICE

DUPLICATE COPY
Not Valid For Refund

45	Standard Copy		
	2821512 1.220ea	54.90N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.18N	
	Order No. 4095747348		
44	Standard Copy		
	2821512 0.180ea	7.92N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 0.360ea	16.20N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 1.280ea	57.60N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.92N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.92N	
	Order No. 4095747348		
44	Standard Copy		
	2821512 0.920ea	40.48N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 0.560ea	25.20N	
	Order No. 4095747348		
20	Standard Copy		
	2821512 0.740ea	14.80N	
	Order No. 4095747348		
SUBTOTAL		219.12	
	Standard Tax 0.0%	0.00	
TOTAL		\$219.12	

AMERICAN EXPRESS USD\$219.12
Card No.: XXXXXXXXXXXXX2001 [C] [H]
Auth No. 825788
Chip Read
Mode.: Issuer
AID.: A000000025010801
TVR.: 0000008000
IAD.: A0E4C1647553F48C3030

**Staples
Connect**
348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 2:15 PM
Transaction: 20650 Cashier: 1992261

Qty	Item	Price	Amount
-----	------	-------	--------

***** Order Number 6866123479*****

1	STANDARD GROUND CO 389788	14.00	14.00
---	------------------------------	-------	-------

Questions on Customer Order 6866123479
Call your local Staples Store

Subtotal 14.00

Total 14.00

AMERICAN EXPRESS USD\$14.00
Card No.: XXXXXXXXXXXXX2001 [C]
Chip Read
Auth No.: 807337
AID.: A000000025010801

Staples Connect,
the working and learning
together every tool to

Santarpio's Pizza- East
Boston
111 Chelsea Street
Boston, MA 02128

Server: Loredana Q
Check #152 Table 9
Ordered: 10/27/22 7:05 PM

1 Glass Chianti	\$7.50
1 Root Beer	\$2.50
1 The Works without Anchovies	\$20.00
1 Sausage	\$9.00
1 Chicken Tip Skewer	\$10.00
1 Glass Burgundy	\$6.00

Subtotal	\$55.00
Tax	\$3.86
Total	\$58.86

Thanks for riding, Chi

We hope you enjoyed your ride
this morning.



Total **\$26.40**

Trip fare \$20.24

Subtotal \$20.24

Booking Fee ⓘ \$2.46

Temporary Fuel Surcharge ⓘ \$0.45

Airport Facility Charge \$3.25

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with Elaine

4.92 ★ Rating

ⓘ Max passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

[Rate or tip](#)

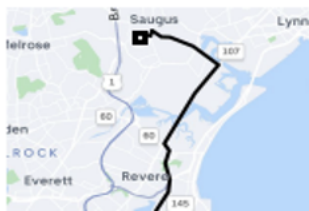
When you ride with Uber, your trips are insured in case of a covered accident.

[Learn more >](#)

UberX 9.83 miles | 23 min

7:32 AM
207 Porter St, Boston, MA
02128, US

7:56 AM
25 Dow St, Saugus, MA
01906, US



Thanks for riding, Chi

We hope you enjoyed your ride
this afternoon.



Total **\$28.44**

Trip fare \$25.07

Subtotal \$25.07

Booking Fee ⓘ \$2.92

Temporary Fuel Surcharge ⓘ \$0.45

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with Yassine

4.25 ★ Rating

Has passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

[Rate or tip](#)

When you ride with Uber, your trips are insured in case of a covered accident.

[Learn more >](#)

UberX 12.36 miles | 31 min

4:41 PM

25 Dow St, Saugus, MA
01906, US

5:13 PM

207 Porter St, Boston, MA
02128, US



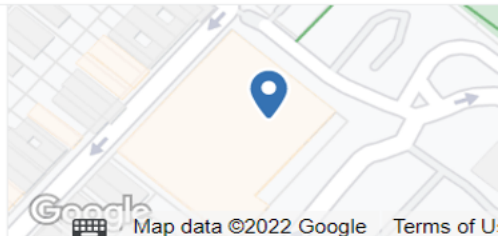


Pending



Print

\$8.00



Card: CHI YOUNG TSCHANG - 32001

Method: Card entered manually

**EMBASSY SUITES BY
HILTON BOSTON - AT
LOGAN AIRPORT**

Don't recognize this charge?

207 PORTER ST

-

This amount may be a pre-authorized charge and might not reflect the final amount.

BOSTON

MA

[Learn more](#)

02128

Invoice #	2
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang

639 4th Ave. #7A

Brooklyn, NY 11232

917-280-4517

chi@excellencereflex.com

Date of Invoice:

October 31, 2022

Bill to

Erin McMahon
Saugus Public Schools

For

October work

#	DESCRIPTION	AMOUNT
1	Total consulting work: 38 hours of consulting work	\$11,361.64
	SUBTOTAL	\$11,361.64
	TAX RATE	0.00%
	OTHER	\$0.00
	TOTAL	\$11,361.64
Please make all checks payable to Excellence Reflex Consulting. If you have any questions concerning this invoice, contact Chi Tschang at 917-280-4517 or chi@excellencereflex.com		

THANK YOU FOR YOUR BUSINESS!

The Line Sports Grill

LGA F

Order number: 221004015001103

Order location: The Line Sports Grill

Order time: October 4th, 2022, 07:24 PM EDT

Payment methods: AMEX

Your receipt

1 Diet Coke	\$4.85
-------------	--------

1 Essex Burger	\$19.99
----------------	---------

Medium

No cheese

1 Iceberg Wedge	\$15.99
-----------------	---------

Item subtotal:	\$40.83
----------------	---------

Sales tax:	\$3.62
------------	--------

Tip:	\$6.12
------	--------

Total:	\$50.57
---------------	----------------

Total

\$55.77

Trip fare	\$49.38
-----------	---------

Subtotal	\$49.38
----------	---------

Booking Fee <input type="checkbox"/>	\$2.69
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

Total

\$10.50

Trip fare \$8.64

Subtotal \$8.64

Booking Fee \$1.41

Temporary Fuel Surcharge \$0.45

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip.
You will receive a trip receipt when the payment is processed with payment information.

You rode with Robson

Total**\$23.40**

Trip fare	\$17.28
-----------	---------

Subtotal	\$17.28
----------	---------

Booking Fee <input type="checkbox"/>	\$2.42
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with JAMES

 4.93 Rating Has passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

Alta Strada
Boston Logan International Airport

495314 William V

CHK 22624
10/5/2022 5:47 PM

Dine In

1 Pure Leaf Lemon Tea BTL

18.5oz 4.00

AMEX \$4.28

XXXXXXXXXXXX1003

Check Tax \$0.00

Beverages NA \$4.00

Tax \$0.28

Payment \$4.28

Change Due \$0.00

----- Check Closed -----

10/5/2022 5:47 PM

LAGUARDIA AIRPORT
TERMINAL CD PARKING

EXIT LANE NO.:	402
RECEIPT:	131172
CASHIER:	0
TRANSACTION:	52013
SNR:	01 403 0341506
ENTRY:	10.04.22 18:55
PAID AT:	10.05.22 23:08
TICKET TYPE:	TRANSIENT TICKE T
FEE:	140.00 USD
PAID:	140.00 USD

TOTAL:	140.00 USD

CAR: HUC7699
 STAY 1D 4:13
 CARDHOLDER COPY

MID	*****
TERM	*****0439
10/05/22	23:09
TRAN 052013	
CARD1003
AMERICAN EXPRESS	
ICC	
SALE CREDIT	
AID	A000000025010801
TC	73CB00A25BA75EA7
AUTH CODE	897377
AMOUNT	\$140.00
TOTAL	\$140.00

No Cardholder
 verification

Ticket #: 0062344725332

Place of Issue:

Issue Date: 19OCT22

Expiration Date: 31DEC23

METHOD OF PAYMENT	
AX*****2001	\$930.20 USD

CHARGES	
Air Transportation Charges	
Base Fare	\$829.78 USD
Taxes, Fees and Charges	
United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY)	\$11.20 USD
United States - Transportation Tax (US)	\$62.22 USD
United States - Passenger Facility Charge (XF)	\$13.50 USD
United States - Flight Segment Tax (ZP)	\$13.50 USD
TICKET AMOUNT	\$930.20 USD

Checked Bag Allowance

The fees below are based on your original ticket purchase. If you qualify for free or discounted checked baggage, this will be taken into account when you check in. Visit delta.com for details on baggage embargoes that may apply to your itinerary.

Thank you for booking official on-airport parking at LaGuardia Airport
DocuSign Envelope ID: C818C840-765B-43AF-8F49-6944A7B3A7D2

Your booking confirmation email will be with you shortly

Booking Reference: LGAC439243

Entry: 5:00 PM - 10/24/2022

Booking Date: 3:01 PM 10/19/2022

Exit: 3:00 PM - 10/28/2022

Parking Lot: Terminal C Standard

Email: chitschang@gmail.com

Total **\$180.00**

Directions to Terminal C Parking can be found [here](#).

Please also note effective Saturday, June 4th, there will be a new Terminal C walkway with direct access into the terminal from Level 5 of the parking structure.

[Home](#)

[Manage Booking](#)

Pricing and rewards

Pricing

Room price

Wed, Oct 26	\$298.99
Thu, Oct 27	\$298.99
Taxes	\$98.34

Total **\$696.32**
Pay at property

[See fee information](#)

[Chat with virtual agent](#)

Nashville, TN ▶ Boston, MA

Passenger Information

CHI TSCHANG

SkyMiles#: 9296637839

Confirmation Number: G05KBR

Ticket Number: 0062344411445

Flight

DATE AND FLIGHT	STATUS	CLASS	SEAT/CABIN
BNA ▶ BOS Tue 01Nov2022 DL 2254	OPEN	W	11A
BOS ▶ BNA Wed 02Nov2022 YX 5743	OPEN	W	

Detailed Charges

Air Transportation Charges

Base Fare: \$520.94 USD

Taxes, Fees and Charges

United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY)	\$11.20 USD
United States - Transportation Tax (US)	\$39.06 USD
United States - Passenger Facility Charge (XF)	\$9.00 USD
United States - Flight Segment Tax (ZP)	\$9.00 USD
Total Price:	\$589.20 USD

Paid with American Express ending 2001 \$589.20 USD

[View Terms and Conditions](#)

Thank you for booking [Terminal C airport parking at LaGuardia Airport](#).

Your booking confirmation email will be with you shortly

Booking Reference: LGAC440014

Entry: 3:30 PM - 10/30/2022

Booking Date: 11:17 AM 10/21/2022

Exit: 11:30 PM - 11/04/2022

Parking Lot: Terminal C Standard

Email: chitschang@gmail.com

Total **\$270.00**

Directions to Terminal C Parking can be found [here](#).

Please also note effective Saturday, June 4th, there will be a new Terminal C walkway with direct access into the terminal from Level 5 of the parking structure.

Pricing and rewards

Pricing

Room price

Tue, Nov 1

\$126.65

Taxes

\$14.82

Total

\$141.47

Pay at property

Connect

348 4th Avenue
 Brooklyn, NY 11215
 718-222-5732

Sale

Store: 957 Register: 5
 Date: 10/23/22 Time: 12:52 PM
 Transaction: 20643 Cashier: 2039988

Qty	Item	Price	Amount
1	ASTOBRIGHT 300 CT. 759598916421	14.99	14.99
	Subtotal		14.99
	NEW YORK 8.875%		1.33
	Total		16.32

AMERICAN EXPRESS USD\$16.32
 Card No. : XXXXXXXXXXXX2001 [C]
 Chip Read
 Auth No. : 803143
 AID.: A000000025010801

Staples Connect,
 the working and learning store.
 Discover every tool to take on tomorrow
 including products, services
 and inspiration that help you
 unlock what is possible.

Shop Smarter. Get Rewarded.
 Staples Rewards members get up to

348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 1:37 PM
Transaction: 20648 Cashier: 2039988

Qty	Item	Price	Amount
1	SPLS BINDER CLIP M 718103151078	3.99	3.99

Subtotal	3.99
NEW YORK 8.875%	0.35

Total 4.34

AMERICAN EXPRESS USD\$4.34
Card No. : XXXXXXXXXXXX2001 [C]
Chip Read
Auth No. : 860477
AID.: A000000025010801

Staples Connect,
the working and learning store.
Discover every tool to take on tomorrow
including products, services
and inspiration that help you
unlock what is possible.

Shop Smarter. Get Rewarded.
Staples Rewards members get up to
5% back in Rewards.
Exclusions Apply. See an associate for

**Staples
Connect**

348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 1:57 PM
Transaction: 20649 Cashier: 2039988

Qty	Item	Price	Amount
	STAPLES 3/16 BUBBL		
1	718103380256	7.49	7.49
	12X9X9 RECTANGLE B		
1	718103422178	1.99	1.99
	SPLS BINDER CLIP M		
1	718103151139	3.99	3.99

Subtotal 13.47
NEW YORK 8.875% 1.20

Total 14.67

AMERICAN EXPRESS USD\$14.67

Card No. : XXXXXXXXXXXXX2001 [C]

Chip Read

Auth No. : 882949

AID.: A000000025010801

Staples Connect,

348 4th Ave
348 4TH BROOKLYN, NY 11215
(718) 222-5732

SALE 0 26 026 47348
957 10/23/22 12:52
QTY SKU PRICE

DUPLICATE COPY
Not Valid For Refund

45	Standard Copy		
	2821512 1.220ea	54.90N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.18N	
	Order No. 4095747348		
44	Standard Copy		
	2821512 0.180ea	7.92N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 0.360ea	16.20N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 1.280ea	57.60N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.92N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.92N	
	Order No. 4095747348		
44	Standard Copy		
	2821512 0.920ea	40.48N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 0.560ea	25.20N	
	Order No. 4095747348		
20	Standard Copy		
	2821512 0.740ea	14.80N	
	Order No. 4095747348		
SUBTOTAL		219.12	
Standard Tax 0.0%		0.00	
TOTAL		\$219.12	

AMERICAN EXPRESS USD\$219.12
Card No.: XXXXXXXXXXXXX2001 [C] [H]
Auth No. 825788
Chip Read
Mode.: Issuer
AID.: A000000025010801
TVR.: 0000008000
IAD.: A0E4C1647553F48C3030

**Staples
Connect**
348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 2:15 PM
Transaction: 20650 Cashier: 1992261

Qty	Item	Price	Amount
-----	------	-------	--------

***** Order Number 6866123479*****

1	STANDARD GROUND CO 389788	14.00	14.00
---	------------------------------	-------	-------

Questions on Customer Order 6866123479
Call your local Staples Store

Subtotal 14.00

Total 14.00

AMERICAN EXPRESS USD\$14.00
Card No.: XXXXXXXXXXXXX2001 [C]
Chip Read
Auth No.: 807337
AID.: A000000025010801

Staples Connect,
the working and learning
together every tool to

Santarpio's Pizza- East
Boston
111 Chelsea Street
Boston, MA 02128

Server: Loredana Q
Check #152 Table 9
Ordered: 10/27/22 7:05 PM

1 Glass Chianti	\$7.50
1 Root Beer	\$2.50
1 The Works without Anchovies	\$20.00
1 Sausage	\$9.00
1 Chicken Tip Skewer	\$10.00
1 Glass Burgundy	\$6.00

Subtotal	\$55.00
Tax	\$3.86
Total	\$58.86

Thanks for riding, Chi

We hope you enjoyed your ride
this morning.



Total **\$26.40**

Trip fare \$20.24

Subtotal \$20.24

Booking Fee ⓘ \$2.46

Temporary Fuel Surcharge ⓘ \$0.45

Airport Facility Charge \$3.25

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with Elaine

4.92 ★ Rating

👤 Max passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

[Rate or tip](#)

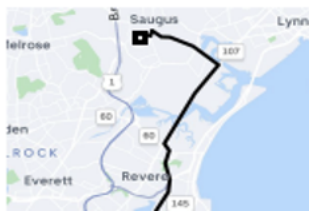
When you ride with Uber, your trips are insured in case of a covered accident.

[Learn more >](#)

UberX 9.83 miles | 23 min

7:32 AM
207 Porter St, Boston, MA
02128, US

7:56 AM
25 Dow St, Saugus, MA
01906, US



Thanks for riding, Chi

We hope you enjoyed your ride
this afternoon.



Total **\$28.44**

Trip fare \$25.07

Subtotal \$25.07

Booking Fee ⓘ \$2.92

Temporary Fuel Surcharge ⓘ \$0.45

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with Yassine

4.25 ★ Rating

Has passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

[Rate or tip](#)

When you ride with Uber, your trips are insured in case of a covered accident.

[Learn more >](#)

UberX 12.36 miles | 31 min

4:41 PM

25 Dow St, Saugus, MA
01906, US

5:13 PM

207 Porter St, Boston, MA
02128, US



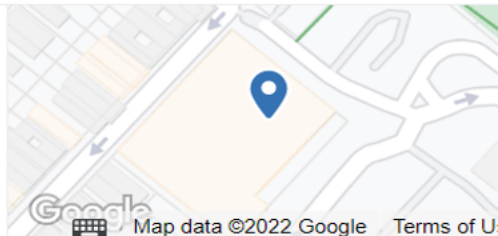


Pending



Print

\$8.00



Card: CHI YOUNG TSCHANG - 32001

Method: Card entered manually

Don't recognize this charge?

This amount may be a pre-authorized charge and might not reflect the final amount.

[Learn more](#)

**EMBASSY SUITES BY
HILTON BOSTON - AT
LOGAN AIRPORT**

207 PORTER ST

-

BOSTON

MA

02128

EXHIBIT D

Invoice #	2
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang

639 4th Ave. #7A

Brooklyn, NY 11232

917-280-4517

chi@excellencereflex.com

Date of Invoice:

October 31, 2022

Bill to

Erin McMahon
Saugus Public Schools

For

October work

#	DESCRIPTION	AMOUNT
1	Total consulting work: 38 hours of consulting work	\$11,361.64
	SUBTOTAL	\$11,361.64
	TAX RATE	0.00%
	OTHER	\$0.00
	TOTAL	\$11,361.64
Please make all checks payable to Excellence Reflex Consulting. If you have any questions concerning this invoice, contact Chi Tschang at 917-280-4517 or chi@excellencereflex.com		

THANK YOU FOR YOUR BUSINESS!

The Line Sports Grill

LGA F

Order number: 221004015001103

Order location: The Line Sports Grill

Order time: October 4th, 2022, 07:24 PM EDT

Payment methods: AMEX

Your receipt

1 Diet Coke	\$4.85
-------------	--------

1 Essex Burger	\$19.99
----------------	---------

Medium

No cheese

1 Iceberg Wedge	\$15.99
-----------------	---------

Item subtotal:	\$40.83
----------------	---------

Sales tax:	\$3.62
------------	--------

Tip:	\$6.12
------	--------

Total:	\$50.57
---------------	----------------

Total

\$55.77

Trip fare	\$49.38
-----------	---------

Subtotal	\$49.38
----------	---------

Booking Fee <input type="checkbox"/>	\$2.69
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

Total

\$10.50

Trip fare \$8.64

Subtotal \$8.64

Booking Fee \$1.41

Temporary Fuel Surcharge \$0.45

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip.
You will receive a trip receipt when the payment is processed with payment information.

You rode with Robson

Total**\$23.40**

Trip fare	\$17.28
-----------	---------

Subtotal	\$17.28
----------	---------

Booking Fee <input type="checkbox"/>	\$2.42
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with JAMES

4.93 <input type="checkbox"/>	Rating
-------------------------------	--------

<input type="checkbox"/>	Has passed a multi-step safety screen
--------------------------	---------------------------------------

Drivers are critical to communities right now. Say thanks with a tip.

Alta Strada
Boston Logan International Airport

495314 William V

CHK 22624
10/5/2022 5:47 PM

Dine In

1 Pure Leaf Lemon Tea BTL

18.5oz 4.00

AMEX \$4.28

XXXXXXXXXXXX1003

Check Tax \$0.00

Beverages NA \$4.00

Tax \$0.28

Payment \$4.28

Change Due \$0.00

----- Check Closed -----

10/5/2022 5:47 PM

LAGUARDIA AIRPORT
TERMINAL CD PARKING

EXIT LANE NO.:	402
RECEIPT:	131172
CASHIER:	0
TRANSACTION:	52013
SNR:	01 403 0341506
ENTRY:	10.04.22 18:55
PAID AT:	10.05.22 23:08
TICKET TYPE:	TRANSIENT TICKE T
FEE:	140.00 USD
PAID:	140.00 USD

TOTAL:	140.00 USD

CAR: HUC7699
 STAY 1D 4:13
 CARDHOLDER COPY

MID	*****
TERM	*****0439
10/05/22	23:09
TRAN 052013	
CARD1003
AMERICAN EXPRESS	
ICC	
SALE CREDIT	
AID	A000000025010801
TC	73CB00A25BA75EA7
AUTH CODE	897377
AMOUNT	\$140.00
TOTAL	\$140.00

No Cardholder
 verification

Ticket #: 0062344725332

Place of Issue:

Issue Date: 19OCT22

Expiration Date: 31DEC23

METHOD OF PAYMENT	
AX*****2001	\$930.20 USD

CHARGES	
Air Transportation Charges	
Base Fare	\$829.78 USD
Taxes, Fees and Charges	
United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY)	\$11.20 USD
United States - Transportation Tax (US)	\$62.22 USD
United States - Passenger Facility Charge (XF)	\$13.50 USD
United States - Flight Segment Tax (ZP)	\$13.50 USD
TICKET AMOUNT	\$930.20 USD

Checked Bag Allowance

The fees below are based on your original ticket purchase. If you qualify for free or discounted checked baggage, this will be taken into account when you check in. Visit delta.com for details on baggage embargoes that may apply to your itinerary.

Thank you for booking official on-airport parking at LaGuardia Airport
DocuSign Envelope ID: C818C840-765B-43AF-8F49-6944A7B3A7D2

Your booking confirmation email will be with you shortly

Booking Reference: LGAC439243

Entry: 5:00 PM - 10/24/2022

Booking Date: 3:01 PM 10/19/2022

Exit: 3:00 PM - 10/28/2022

Parking Lot: Terminal C Standard

Email: chitschang@gmail.com

Total **\$180.00**

Directions to Terminal C Parking can be found [here](#).

Please also note effective Saturday, June 4th, there will be a new Terminal C walkway with direct access into the terminal from Level 5 of the parking structure.

[Home](#)

[Manage Booking](#)

Pricing and rewards

Pricing

Room price

Wed, Oct 26	\$298.99
Thu, Oct 27	\$298.99
Taxes	\$98.34

Total **\$696.32**
Pay at property

[See fee information](#)

[Chat with virtual agent](#)

Nashville, TN ► Boston, MA

Passenger Information

CHI TSCHANG

SkyMiles#: 9296637839

Confirmation Number: G05KBR

Ticket Number: 0062344411445

Flight

DATE AND FLIGHT	STATUS	CLASS	SEAT/CABIN
BNA ► BOS Tue 01Nov2022 DL 2254	OPEN	W	11A
BOS ► BNA Wed 02Nov2022 YX 5743	OPEN	W	

Detailed Charges

Air Transportation Charges

Base Fare: \$520.94 USD

Taxes, Fees and Charges

United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY)	\$11.20 USD
United States - Transportation Tax (US)	\$39.06 USD
United States - Passenger Facility Charge (XF)	\$9.00 USD
United States - Flight Segment Tax (ZP)	\$9.00 USD
Total Price:	\$589.20 USD

Paid with American Express ending 2001 \$589.20 USD

[View Terms and Conditions](#)

Thank you for booking **Standard** airport parking at LaGuardia Airport.

Your booking confirmation email will be with you shortly

Booking Reference: LGAC440014

Entry: 3:30 PM - 10/30/2022

Booking Date: 11:17 AM 10/21/2022

Exit: 11:30 PM - 11/04/2022

Parking Lot: Terminal C Standard

Email: chitschang@gmail.com

Total **\$270.00**

Directions to Terminal C Parking can be found [here](#).

Please also note effective Saturday, June 4th, there will be a new Terminal C walkway with direct access into the terminal from Level 5 of the parking structure.

Pricing and rewards

Pricing

Room price

Tue, Nov 1

\$126.65

Taxes

\$14.82

Total

\$141.47

Pay at property

Connect

348 4th Avenue
 Brooklyn, NY 11215
 718-222-5732

Sale

Store: 957 Register: 5
 Date: 10/23/22 Time: 12:52 PM
 Transaction: 20643 Cashier: 2039988

Qty	Item	Price	Amount
1	ASTOBRIGHT 300 CT. 759598916421	14.99	14.99
	Subtotal		14.99
	NEW YORK 8.875%		1.33
	Total		16.32

AMERICAN EXPRESS USD\$16.32
 Card No. : XXXXXXXXXXXX2001 [C]
 Chip Read
 Auth No. : 803143
 AID.: A000000025010801

Staples Connect,
 the working and learning store.
 Discover every tool to take on tomorrow
 including products, services
 and inspiration that help you
 unlock what is possible.

Shop Smarter. Get Rewarded.
 Staples Rewards members get up to

348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 1:37 PM
Transaction: 20648 Cashier: 2039988

Qty	Item	Price	Amount
1	SPLS BINDER CLIP M 718103151078	3.99	3.99

Subtotal	3.99
NEW YORK 8.875%	0.35

Total 4.34

AMERICAN EXPRESS USD\$4.34
Card No. : XXXXXXXXXXXX2001 [C]
Chip Read
Auth No. : 860477
AID.: A000000025010801

Staples Connect,
the working and learning store.
Discover every tool to take on tomorrow
including products, services
and inspiration that help you
unlock what is possible.

Shop Smarter. Get Rewarded.
Staples Rewards members get up to
5% back in Rewards.
Exclusions Apply. See an associate for

**Staples
Connect**

348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 1:57 PM
Transaction: 20649 Cashier: 2039988

Qty	Item	Price	Amount
	STAPLES 3/16 BUBBL		
1	718103380256	7.49	7.49
	12X9X9 RECTANGLE B		
1	718103422178	1.99	1.99
	SPLS BINDER CLIP M		
1	718103151139	3.99	3.99

Subtotal 13.47
NEW YORK 8.875% 1.20

Total 14.67

AMERICAN EXPRESS USD\$14.67

Card No. : XXXXXXXXXXXXX2001 [C]

Chip Read

Auth No. : 882949

AID.: A000000025010801

Staples Connect,

348 4th Ave
348 4TH BROOKLYN, NY 11215
(718) 222-5732

SALE 0 26 026 47348
957 10/23/22 12:52
QTY SKU PRICE

DUPLICATE COPY
Not Valid For Refund

45	Standard Copy		
	2821512 1.220ea	54.90N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.18N	
	Order No. 4095747348		
44	Standard Copy		
	2821512 0.180ea	7.92N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 0.360ea	16.20N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 1.280ea	57.60N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.92N	
	Order No. 4095747348		
1	Standard Copy		
	2821512	0.92N	
	Order No. 4095747348		
44	Standard Copy		
	2821512 0.920ea	40.48N	
	Order No. 4095747348		
45	Standard Copy		
	2821512 0.560ea	25.20N	
	Order No. 4095747348		
20	Standard Copy		
	2821512 0.740ea	14.80N	
	Order No. 4095747348		
SUBTOTAL		219.12	
Standard Tax 0.0%		0.00	
TOTAL		\$219.12	

AMERICAN EXPRESS USD\$219.12
Card No.: XXXXXXXXXXXX2001 [C] [H]
Auth No. 825788
Chip Read
Mode.: Issuer
AID.: A00000025010801
TVR.: 0000008000
IAD.: A0E4C1647553F48C3030

**Staples
Connect**

348 4th Avenue
Brooklyn, NY 11215
718-222-5732

Sale

Store: 957 Register: 5
Date: 10/23/22 Time: 2:15 PM
Transaction: 20650 Cashier: 1992261

Qty	Item	Price	Amount
-----	------	-------	--------

***** Order Number 6866123479*****

1	STANDARD GROUND CO 389788	14.00	14.00
---	------------------------------	-------	-------

Questions on Customer Order 6866123479
Call your local Staples Store

Subtotal 14.00

Total 14.00

AMERICAN EXPRESS USD\$14.00
Card No.: XXXXXXXXXXXX2001 [C]
Chip Read
Auth No.: 807337
AID.: A00000025010801

Staples Connect,
the working and learning
partner every tool to

Santarpio's Pizza- East
Boston
111 Chelsea Street
Boston, MA 02128

Server: Loredana Q
Check #152 Table 9
Ordered: 10/27/22 7:05 PM

1 Glass Chianti	\$7.50
1 Root Beer	\$2.50
1 The Works without Anchovies	\$20.00
1 Sausage	\$9.00
1 Chicken Tip Skewer	\$10.00
1 Glass Burgundy	\$6.00

Subtotal	\$55.00
Tax	\$3.86
Total	\$58.86

Thanks for riding, Chi

We hope you enjoyed your ride
this morning.



Total **\$26.40**

Trip fare \$20.24

Subtotal \$20.24

Booking Fee ⓘ \$2.46

Temporary Fuel Surcharge ⓘ \$0.45

Airport Facility Charge \$3.25

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with Elaine

4.92 ★ Rating

ⓘ Max passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

[Rate or tip](#)

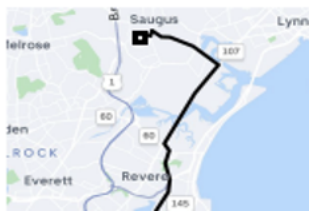
When you ride with Uber, your trips are insured in case of a covered accident.

[Learn more >](#)

UberX 9.83 miles | 23 min

7:32 AM
207 Porter St, Boston, MA
02128, US

7:56 AM
25 Dow St, Saugus, MA
01906, US



Thanks for riding, Chi

We hope you enjoyed your ride
this afternoon.



Total **\$28.44**

Trip fare \$25.07

Subtotal \$25.07

Booking Fee ⓘ \$2.92

Temporary Fuel Surcharge ⓘ \$0.45

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with Yassine

4.25 ★ Rating

Has passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

[Rate or tip](#)

When you ride with Uber, your trips are insured in case of a covered accident.

[Learn more >](#)

UberX 12.36 miles | 31 min

4:41 PM

25 Dow St, Saugus, MA
01906, US

5:13 PM

207 Porter St, Boston, MA
02128, US





Pending



Print

\$8.00

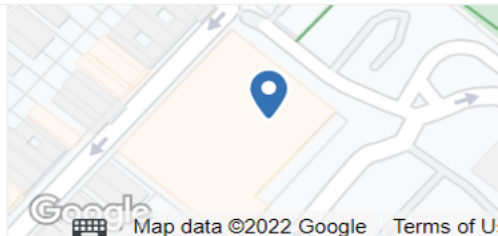
Card: CHI YOUNG TSCHANG - 32001

Method: Card entered manually

Don't recognize this charge?

This amount may be a pre-authorized charge and might not reflect the final amount.

[Learn more](#)



**EMBASSY SUITES BY
HILTON BOSTON - AT
LOGAN AIRPORT**

207 PORTER ST

-

BOSTON

MA

02128

EXHIBIT E

Invoice #	3
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang

639 4th Ave. #7A

Brooklyn, NY 11232

917-280-4517

chi@excellencereflex.com

Date of Invoice:

November 30, 2022

Bill to

Erin McMahon

Saugus Public Schools

For

November work

DESCRIPTION	AMOUNT	Receipts?
Reimbursement: Dinner at B Good, 11/2	\$21.40	Yes
Reimbursement: Uber from Saugus District to Logan, 11/2	\$24.75	Yes
Reimbursement: Uber from Holiday Inn Express to Saugus High, 11/2	\$9.16	Yes
Reimbursement: Uber from Logan to Holiday Inn Express, 11/1	\$31.72	Yes
Reimbursement: Uber from KAN to BNA, 11/1	\$20.06	Yes
Reimbursement: Parking for additional night at LGA, 11/5	\$9.00	Yes
Reimbursement: Delta flight to Boston, 11/16	\$604.60	Yes
Reimbursement: Parking at LGA airport, 11/15-11/16	\$67.50	Yes
Reimbursement: Holiday Inn, 11/15	\$166.43	Yes
Reimbursement: Dinner at Rossi Pizzeria (LGA), 11/15	\$47.37	Yes
Reimbursement: Uber from Logan to Holiday Inn Express, 11/15	\$45.35	Yes
Reimbursement: Water and soda	\$5.00	Yes
Reimbursement: Uber from Holiday Inn Express to Saugus District, 11/16	\$11.62	Yes
Reimbursement: Uber from Saugus District to Logan, 11/16	\$25.01	Yes
hrs), 11/12 (1 hr), 11/14 (2 hrs), 11/15 (2 hrs), 11/16 (8 hrs) and 11/23 (1.5 hrs)	\$7,200.00	

B. Good Burger
Delaware North Travel
Boston Logan International Airport

ORDER: 908

TSCHANG/CHI YOUNG
11/2/2022 5:16 PM

Grab: 18451453
Ref: 164908

Spicy Avocado & Lime Bowl 16.80
Add Chicken
Add Egg

Gatorade Cool Blue - 20oz 3.20

Subtotal 20.00

Sales Tax 1.40

Total USD\$ 21.40

Charged to AMEX 2001

Tell us about your experience by visiting
DelawareNorthListens.com

Your order was powered by Grab!
Next time, avoid the line with Grab
mobile ordering! www.getgrab.com

TOTAL**\$24.75**

Trip fare	\$18.61
-----------	---------

Subtotal	\$18.61
----------	---------

Booking Fee <input type="checkbox"/>	\$2.44
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with AGATHANGELOS

Total \$9.16

Trip fare \$7.30

Subtotal \$7.30

Booking Fee \$1.41

Temporary Fuel Surcharge \$0.45

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip.
You will receive a trip receipt when the payment is processed with payment information.

Total

\$31.72

Trip fare	\$23.79
-----------	---------

Subtotal	\$23.79
----------	---------

Booking Fee <input type="checkbox"/>	\$2.71
--------------------------------------	--------

Wait Time <input type="checkbox"/>	\$1.52
------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

Payments



AmEx ****2001

11/2/22 9:16 AM

\$31.72

[Download PDF](#)

Total

\$20.06

Trip fare \$11.55

Subtotal \$11.55

Booking Fee \$2.89

Wait Time \$0.07

Airport and City Surcharge \$5.00

Temporary Fuel Surcharge \$0.55

Payments



AmEx ****2001

11/2/22 3:39 AM

\$20.06

LAGUARDIA AIRPORT
TERMINAL CD PARKING

EXIT LANE NO.: 404
 RECEIPT: 115798
 CASHIER: 0
 TRANSACTION: 53239
 SNR: 01 000 0345709
 ENTRY: 10.30.22 15:38
 PAID AT: 11.05.22 17:36
 TICKET TYPE: LOST TICKET
 FEE: 45.00 USD
 PAID: 45.00 USD

TOTAL: 45.00 USD

CAR: ?0000345709

STAY 6D 1:58

CARDHOLDER COPY

MID *****
 TERM *****0440
 11/05/22 17:36
 TRAN 053239
 CARD2001
 AMERICAN EXPRESS
 ICC
 SALE CREDIT
 AID A000000025010801
 TC 7DC36FC1917A373A
 AUTH CODE 868198
 AMOUNT \$45.00
 TOTAL \$45.00

No Cardholder
verification
(00) APPROVED

Your account will be
debited with the above
am

TAXES INCLUDED

NEW YORK-LaGuardia, NY ► Boston, MA

Passenger Information

CHI TSCHANG

SkyMiles#: 9296637839

Confirmation Number: HQZLP9

Ticket Number: 0062348555495

Flight

DATE AND FLIGHT	STATUS	CLASS	SEAT/CABIN
LGA ► BOS Tue 15Nov2022 YX 5766	OPEN	I	
BOS ► ATL Wed 16Nov2022 DL 504	OPEN	I	3D
ATL ► BNA Wed 16Nov2022 DL 2433	OPEN	I	2A
BNA ► LGA Thu 17Nov2022 9E 5491	OPEN	I	

Detailed Charges

Air Transportation Charges

Base Fare: \$1,080.93 USD

Taxes, Fees and Charges

United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY) \$11.20 USD

United States - Transportation Tax (US) \$81.07 USD

United States - Passenger Facility Charge (XF) \$18.00 USD

United States - Flight Segment Tax (ZP) \$18.00 USD

Total Price: \$1,209.20 USD

Paid with American Express ending 2001 \$1,209.20 USD

[View Terms and Conditions](#)

Your booking confirmation email will be with you shortly

Booking Reference: LGAC449231

Entry: 6:30 PM - 11/15/2022

Booking Date: 9:29 AM 11/11/2022

Exit: 11:00 PM - 11/17/2022

Parking Lot: Terminal C Standard

Email: chitschang@gmail.com

Total **\$135.00**

Directions to Terminal C Parking can be found [here](#).

Please also note effective Saturday, June 4th, there will be a new Terminal C walkway with direct access into the terminal from Level 5 of the parking structure.

Holiday Inn Express Saugus (Logan Airport), an IHG Hotel

999 Broadway, Saugus, MA, 01906 United States of America

Check-in: Nov 15, 2022

Check-out: Nov 16, 2022

1 room x 1 night

Standard Room, 1 King Bed (LEISURE)

Booked for: Chi Tschang

Payment details

Room price

Tue, Nov 15 \$149.00

Taxes \$17.43

Total **\$166.43**

Paid

[AmericanExpress 2001]

LGA G

Order number: **221115028000014**

Order location: Rossi Pizzeria Dine In

Order time: November 15th, 2022, 07:04 PM EST

Payment methods: AMEX

Your receipt

1 Diet Coke	\$4.85
1 Pepperoni Pizza Mushrooms	\$19.39
1 Tomato & Mozzarella Salad	\$14.00
Item subtotal:	\$38.24
Sales tax:	\$3.39
Tip:	\$5.74
Total:	\$47.37

Thanks for riding, Chi

We hope you enjoyed your ride
this evening.



Total

\$45.35

Trip fare	\$38.94
-----------	---------

Subtotal	\$38.94
----------	---------

Booking Fee ?	\$2.71
-------------------------------	--------

Temporary Fuel Surcharge ?	\$0.45
--	--------

Airport Facility Charge	\$3.25
-------------------------	--------

Post It	Folio No. :	5043	Room No. :	
	A/R Number :		Arrival :	
	Group Code :		Departure :	
	Company :		Conf. No. :	
	Membership No. :		Rate Code :	
	Invoice No. :		Page No. :	1 of 1

Date	Description	Charges	Cre
11-15-22	Sundries	3.00	
11-15-22	Sundries	2.00	
11-15-22	American Express XXXXXXXXXXXXXXX2001		
Total		5.00	
Balance		0.00	

Guest Signature: _____

I have received the goods and / or services in the amount shown hereon. I agree that my liability for this bill is not waived and agree to be held personally liable in the event that the indicated person, company, or associate fails to pay for any part or the full amount of these charges. If a credit card charge, I further agree to perform the obligations set forth in the cardholder's agreement with the issuer.

Total

\$11.62

Trip fare	\$9.76
-----------	--------

Subtotal	\$9.76
----------	--------

Booking Fee <input type="checkbox"/>	\$1.41
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with Anderson

4.95 Rating

Has passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

Total

\$25.01

Trip fare	\$18.91
-----------	---------

Subtotal	\$18.91
----------	---------

Booking Fee <input type="checkbox"/>	\$2.40
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

EXHIBIT F

Invoice #	3
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang

639 4th Ave. #7A

Brooklyn, NY 11232

917-280-4517

chi@excellencereflex.com

Date of Invoice:

November 30, 2022

Bill to

Erin McMahon
Saugus Public Schools

For

November work

#	DESCRIPTION	AMOUNT
15	Consulting Fee: 28 hours of work	\$8,288.97
16		
17		
18		
	SUBTOTAL	\$8,288.97
	TAX RATE	0.00%
	OTHER	\$0.00
	TOTAL	\$8,288.97
Please make all checks payable to Excellence Reflex Consulting. If you have any questions concerning this invoice, contact Chi Tschang at 917-280-4517 or chi@excellencereflex.com		

THANK YOU FOR YOUR BUSINESS!

B. Good Burger
Delaware North Travel
Boston Logan International Airport

ORDER: 908

TSCHANG/CHI YOUNG
11/2/2022 5:16 PM

Grab: 18451453
Ref: 164908

Spicy Avocado & Lime Bowl 16.80
Add Chicken
Add Egg

Gatorade Cool Blue - 20oz 3.20

Subtotal 20.00

Sales Tax 1.40

Total USD\$ 21.40

Charged to AMEX 2001

Tell us about your experience by visiting
DelawareNorthListens.com

Your order was powered by Grab!
Next time, avoid the line with Grab
mobile ordering! www.getgrab.com

TOTAL**\$24.75**

Trip fare	\$18.61
-----------	---------

Subtotal	\$18.61
----------	---------

Booking Fee <input type="checkbox"/>	\$2.44
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip. You will receive a trip receipt when the payment is processed with payment information.

You rode with AGATHANGELOS

Total **\$9.16**

Trip fare \$7.30

Subtotal \$7.30

Booking Fee \$1.41

Temporary Fuel Surcharge \$0.45

[Download PDF](#)

This is not a payment receipt. It is a trip summary to acknowledge the completion of the trip.
You will receive a trip receipt when the payment is processed with payment information.

Total

\$31.72

Trip fare	\$23.79
-----------	---------

Subtotal	\$23.79
----------	---------

Booking Fee <input type="checkbox"/>	\$2.71
--------------------------------------	--------

Wait Time <input type="checkbox"/>	\$1.52
------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

Payments



AmEx **2001**

11/2/22 9:16 AM

\$31.72

[Download PDF](#)

Total

\$20.06

Trip fare \$11.55

Subtotal \$11.55

Booking Fee \$2.89

Wait Time \$0.07

Airport and City Surcharge \$5.00

Temporary Fuel Surcharge \$0.55

Payments



AmEx ****2001

11/2/22 3:39 AM

\$20.06

LAGUARDIA AIRPORT
TERMINAL CD PARKING

EXIT LANE NO.: 404
RECEIPT: 115798
CASHIER: 0
TRANSACTION: 53239
SNR: 01 000 0345709
ENTRY: 10.30.22 15:38
PAID AT: 11.05.22 17:36
TICKET TYPE: LOST TICKET
FEE: 45.00 USD
PAID: 45.00 USD

TOTAL: 45.00 USD

CAR: ?0000345709

STAY 6D 1:58

CARDHOLDER COPY

MID *****

TERM *****0440

11/05/22 17:36

TRAN 053239

CARD2001

AMERICAN EXPRESS

ICC

SALE CREDIT

AID A000000025010801

TC 7DC36FC1917A373A

AUTH CODE 868198

AMOUNT \$45.00

TOTAL \$45.00

No Cardholder
verification
(00) APPROVED

Your account will be
debited with the above
am

TAXES INCLUDED

NEW YORK-LaGuardia, NY ► Boston, MA

Passenger Information

CHI TSCHANG

SkyMiles#: 9296637839

Confirmation Number: HQZLP9

Ticket Number: 0062348555495

Flight

DATE AND FLIGHT	STATUS	CLASS	SEAT/CABIN
LGA ► BOS Tue 15Nov2022 YX 5766	OPEN	I	
BOS ► ATL Wed 16Nov2022 DL 504	OPEN	I	3D
ATL ► BNA Wed 16Nov2022 DL 2433	OPEN	I	2A
BNA ► LGA Thu 17Nov2022 9E 5491	OPEN	I	

Detailed Charges

Air Transportation Charges

Base Fare: \$1,080.93 USD

Taxes, Fees and Charges

United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY) \$11.20 USD

United States - Transportation Tax (US) \$81.07 USD

United States - Passenger Facility Charge (XF) \$18.00 USD

United States - Flight Segment Tax (ZP) \$18.00 USD

Total Price: \$1,209.20 USD

Paid with American Express ending 2001 \$1,209.20 USD

[View Terms and Conditions](#)

Your booking confirmation email will be with you shortly

Booking Reference: LGAC449231

Entry: 6:30 PM - 11/15/2022

Booking Date: 9:29 AM 11/11/2022

Exit: 11:00 PM - 11/17/2022

Parking Lot: Terminal C Standard

Email: chitschang@gmail.com

Total **\$135.00**

Directions to Terminal C Parking can be found [here](#).

Please also note effective Saturday, June 4th, there will be a new Terminal C walkway with direct access into the terminal from Level 5 of the parking structure.

Holiday Inn Express Saugus (Logan Airport), an IHG Hotel

999 Broadway, Saugus, MA, 01906 United States of America

Check-in: Nov 15, 2022

Check-out: Nov 16, 2022

1 room x 1 night

Standard Room, 1 King Bed (LEISURE)

Booked for: Chi Tschang

Payment details

Room price

Tue, Nov 15 \$149.00

Taxes \$17.43

Total **\$166.43**

Paid

[AmericanExpress 2001]

LGA G

Order number: **221115028000014**

Order location: Rossi Pizzeria Dine In

Order time: November 15th, 2022, 07:04 PM EST

Payment methods: AMEX

Your receipt

1 Diet Coke	\$4.85
-------------	--------

1 Pepperoni Pizza	\$19.39
Mushrooms	

1 Tomato & Mozzarella Salad	\$14.00
-----------------------------	---------

Item subtotal:	\$38.24
----------------	---------

Sales tax:	\$3.39
------------	--------

Tip:	\$5.74
------	--------

Total:	\$47.37
---------------	----------------

Thanks for riding, Chi

We hope you enjoyed your ride
this evening.



Total

\$45.35

Trip fare	\$38.94
-----------	---------

Subtotal	\$38.94
----------	---------

Booking Fee ?	\$2.71
-------------------------------	--------

Temporary Fuel Surcharge ?	\$0.45
--	--------

Airport Facility Charge	\$3.25
-------------------------	--------

Post It	Folio No. :	5043	Room No. :	
	A/R Number :		Arrival :	
	Group Code :		Departure :	
	Company :		Conf. No. :	
	Membership No. :		Rate Code :	
	Invoice No. :		Page No. :	1 of 1

Date	Description	Charges	Cre
11-15-22	Sundries	3.00	
11-15-22	Sundries	2.00	
11-15-22	American Express XXXXXXXXXXXXXXX2001		
Total		5.00	
Balance		0.00	

Guest Signature: _____

I have received the goods and / or services in the amount shown hereon. I agree that my liability for this bill is not waived and agree to be held personally liable in the event that the indicated person, company, or associate fails to pay for any part or the full amount of these charges. If a credit card charge, I further agree to perform the obligations set forth in the cardholder's agreement with the issuer.

Total

\$11.62

Trip fare	\$9.76
-----------	--------

Subtotal	\$9.76
----------	--------

Booking Fee <input type="checkbox"/>	\$1.41
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

[Download PDF](#)

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You rode with Anderson

4.95 Rating

Has passed a multi-step safety screen

Drivers are critical to communities right now. Say thanks with a tip.

Total

\$25.01

Trip fare	\$18.91
-----------	---------

Subtotal	\$18.91
----------	---------

Booking Fee <input type="checkbox"/>	\$2.40
--------------------------------------	--------

Temporary Fuel Surcharge <input type="checkbox"/>	\$0.45
---	--------

Airport Facility Charge	\$3.25
-------------------------	--------

[Download PDF](#)

EXHIBIT G"

Invoice #	4
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang
639 4th Ave. #7A
Brooklyn, NY 11232
917-280-4517
chi@excellencereflex.com

Date of Invoice:

December 31, 2022

Bill to

Erin McMahon
Saugus Public Schools

For

December work


#	DESCRIPTION	AMOUNT
1	Consulting Fee: 7.5 hours of work	\$2,250.00
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		

#	DESCRIPTION	AMOUNT
18		
	SUBTOTAL	\$2,250.00
	TAX RATE	0.00%
	OTHER	\$0.00
	TOTAL	\$2,250.00
Please make all checks payable to Excellence Reflex Consulting. If you have any questions concerning this invoice, contact Chi Tschang at 917-280-4517 or chi@excellencereflex.com		

THANK YOU FOR YOUR BUSINESS!

**DISCLOSURE BY NON-ELECTED MUNICIPAL EMPLOYEE OF FINANCIAL INTEREST
AND DETERMINATION BY APPOINTING AUTHORITY
AS REQUIRED BY G. L. c. 268A, § 19**

MUNICIPAL EMPLOYEE INFORMATION	
Name:	Erin McMahon
Title or Position:	Superintendent
Municipal Agency:	Saugus Public Schools
Agency Address:	25 Dow Street Saugus MA. 01906
Office Phone:	781-231-5000
Office E-mail:	
	My duties require me to participate in a particular matter, and I may not participate because of a financial interest that I am disclosing here. I request a determination from my appointing authority about how I should proceed.
PARTICULAR MATTER	
Particular matter E.g., a judicial or other proceeding, application, submission, request for a ruling or other determination, contract, claim, controversy, charge, accusation, arrest, decision, determination, or finding.	Please describe the particular matter: See Attached
Your required participation in the particular matter: E.g., approval, disapproval, decision, recommendation, rendering advice, investigation, other.	Please describe the task you are required to perform with respect to the particular matter. See Attached
FINANCIAL INTEREST IN THE PARTICULAR MATTER	
Write an X by all that apply.	<ul style="list-style-type: none"> - I have a financial interest in the matter. - My immediate family member has a financial interest in the matter. - My business partner has a financial interest in the matter. - I am an officer, director, trustee, partner or employee of a business organization, and the business organization has a financial interest in the matter. - I am negotiating or have made an arrangement concerning future employment with a person or organization, and the person or organization has a financial interest in the matter.

Financial interest in the matter	Please explain the financial interest and include a dollar amount if you know it. See Attached
* Employee signature:	
Date:	04/00/23

DETERMINATION BY APPOINTING OFFICIAL

APPOINTING AUTHORITY INFORMATION	
Name of Appointing Authority:	
Title or Position:	
Agency/Department:	
Agency Address:	
Office Phone:	
Office E-mail:	
DETERMINATION	
Determination by appointing authority:	As appointing official, as required by G.L. c. 268A, § 19, I have reviewed the particular matter and the financial interest identified above by a municipal employee. I have determined that the financial interest is not so substantial as to be deemed likely to affect the integrity of the services which the municipality may expect from the employee.
Appointing Authority signature:	
Date:	
Comment:	


Attach additional pages if necessary.

The appointing authority shall keep this Disclosure and Determination as a public record.

**DISCLOSURE UNDER §23(b)(3)
OF A GIFT UNRELATED TO OFFICIAL ACTION, POSITION OR DUTIES
AS REQUIRED BY 930 CMR 5.06**

PUBLIC EMPLOYEE INFORMATION	
Name of public employee:	Erin McMahon
Title/ Position:	Superintendent
Agency/ Department:	Saugus Public Schools
Agency address:	25 Dow Street Saugus MA. 01906
Office Phone	781-231-5000
Office E-mail	
Put an X beside the relevant statement about a six-month period.	<p>I have accepted a gift of substantial value (i.e., worth \$50 or more) from a person or organization who is not a lobbyist. The gift is entirely unrelated to official action by me as a state, county or municipal employee, or to my official position, or to the performance of my official duties. I am filing this disclosure because</p> <p><input type="checkbox"/> A matter involving the giver previously came before me within the six months prior to my acceptance of the gift; or</p> <p><input type="checkbox"/> A matter involving the giver is coming before me during the six months after I accepted the gift.</p> <p>My purpose in filing the disclosure is to dispel the appearance that the person or organization who gave me the gift can unduly enjoy my favor or improperly influence me when I perform my official duties, or that I am likely to act or fail to act as a result of kinship, rank, position or undue influence of any party or person.</p>
GIFT UNRELATED TO OFFICIAL ACTION, POSITION OR DUTIES	
Name and address of person or organization that gave you the gift	No gift received Disclosure pursuant to 23(b) See Attached
Your relationship to the giver of the gift	
Date when you accepted the gift	
Description of the gift	

	Value of the gift	
	Circumstances under which you received the gift	
		PARTICULAR MATTER REGARDING THE GIVER
	Answer questions below if applicable	MATTER THAT CAME BEFORE YOU WITHIN SIX MONTHS BEFORE YOU RECEIVED THE GIFT
	Describe the matter involving the giver that came before you as a public employee.	
	Date when the matter came before you.	
	What responsibility did you have for taking action or making a decision?	
	Answer questions below if applicable	MATTER THAT WILL COME BEFORE YOU WITHIN SIX MONTHS AFTER YOU RECEIVED THE GIFT
	Describe the matter regarding the giver that is coming before you for decision or official action.	
	Date when the matter is coming before you	
	What responsibility do you have for taking action or making a decision?	

<p>If you cannot confirm this statement, you should recuse yourself.</p>		<p>REGARDING FUTURE ACTION, WRITE AN XTO CONFIRM THIS STATEMENT.</p> <p>— Taking into account the relationship or affiliation that I have disclosed, I feel that I can perform, my official duties objectively and fairly with regard to the matter that I have described above.</p>
Employee signature:		
Date:		04/06/23

Attach additional pages if necessary.

Not elected to your public position - file with your appointing authority.

Elected state or county employees - file with the State Ethics Commission.

Members of the General Court - file with the House or Senate clerk or the State Ethics Commission.

Elected municipal employee - file with the City Clerk or Town Clerk.

Elected regional school committee member - file with the clerk or secretary of the committee.

Disclosure pursuant to M.G.L. c.268—Erin McMahon, Superintendent of Schools, Saugus MA

INTRODUCTION

While I believe I have adhered to all requirements of the law and no disclosure is necessary, nonetheless, I have come to understand there to be some concerns about services Relay Graduate School of Education (“Relay”) provided to Saugus Public Schools and whether I had a consulting relationship with Relay when I began my work in Saugus in July, 2021 or thereafter. I therefore make the following disclosure.

I did not have a consulting or work agreement with Relay at the time I began work in Saugus, on July 1, 2021. I did not bring Relay to Saugus with the expectation that they would offer me employment, a consulting relationship in the future, or any benefit of substantial value.

By way of context, I have been compelled to take administrative leave while the Town of Saugus/Saugus Public Schools conducts an investigation into alleged complaints about my work as Superintendent. Those complaints have not been shared with me in the format required under my contract following repeated requests, and the School Committee has not engaged with me on any such issues as my contract requires. I have commenced arbitration to address this deficiency.

I regret to say that I believe the current investigation is motivated in large part by my gender. While there are many reasons I have come to this conclusion, including that I acted at all times in the best interests of the District and transparently, I will mention only one objective fact here: Saugus has replaced four prior Superintendents in the past 10 years, but it has never commenced such an investigation into any of the prior Superintendents, all male.

Nonetheless, in response to questions about services provided to the Saugus Public Schools by Relay Graduate School of Education and whether I had a consulting relationship with Relay when I began my work in Saugus in July of 2021, or thereafter, I make the following disclosure pursuant to M.G. L. c. 268A, section 19 and section 23(b)(3):

BACKGROUND ON RELAY, PURSUIT OF MY DOCTORAL DEGREE, and CONSULTING ACTIVITIES

The circumstances surrounding the District contracting with Relay for its provision of professional development programming for District staff in August, 2021, and my extremely limited consulting relationship with Relay in February and June/July, 2022, which has ceased, is as follows.

The Massachusetts Department of Elementary and Secondary Education assessed the performance of the Saugus Public Schools in a comprehensive, 88-page report in 2019. DESE identified (and I am quoting from the report below in bullet points) the deficiencies in the educational program in Saugus, particularly the absence of data-based decision-making for curriculum and instruction, at the time as:

- District and school improvement plans are incomplete, unfocused, uneven in quality, and in some cases, nonexistent. There is limited evidence of strategic planning to drive improvement and assessment of progress toward the realization of outcomes,

- The school committee, central office, and school leaders have not established a culture of collaboration that focuses on improving teaching and learning and is infused with a sense of urgency.
- In observed classrooms, the quality of instruction was inconsistent districtwide,
- The district does not have a high-quality, standards-aligned, documented curriculum; a regular curriculum review and revision process; and a sufficient number of people empowered to exercise curriculum leadership,
- The district's data collection and analysis system is incomplete and inconsistent.
- The district does not use data systematically to improve teaching, learning, and decision-making, and to inform key stakeholders.
- The district's educator evaluation system does not ensure that educators receive high-quality feedback that helps them to improve their practice,
- The district's professional development program is not informed by student and educator data, aligned with district and educator goals, and focused on student outcomes.
- The district does not have a proactive tiered system of targeted academic and other support to meet the needs of all students, based upon data-driven decision-making and progress monitoring.
- The district has not established a positive behavioral system with an ongoing data-monitoring process to evaluate progress,
- Many principals, teachers, and students expressed concern and frustration with the history of allocation of financial resources, which they stated has led to an inadequate deployment of staff, both at the leadership level and in key school-based roles, and insufficient provision of learning materials, textbooks, and supplies,
- The district's budget documents for fiscal year 2019 and fiscal year 2020 do not include key information that connects improvement planning and student performance to the allocation of resources, nor do they include all available resources, such as grants and revolving accounts. In addition, the district and the town do not have an up-to-date and signed written agreement on municipal expenditures in support of the district.
- The district and the town do not have a comprehensive plan to improve and maintain its buildings and to ensure the effective use of buildings and operational systems. Staffing of facilities is incomplete.

When I was hired as Superintendent in July 2021, I was aware of the DESE findings because the Committee required each applicant to review the DESE report. The Committee instructed applicants to be familiar with the report and to be prepared to answer questions related to it in the

interview process. I immediately began to assess the needs of students, parents, teachers, administrators and local political leaders in developing a course of action to raise student performance from the bottom tenth of the state to the top tenth. As part of the planning for district wide improvement I considered the then absence of meaningful data collection and analysis—without which we could not identify a baseline and plan for improvement. The Saugus School Committee agreed that one of my goals was to create and implement a plan for District-wide improvement.

Relay Graduate School of Education (hereinafter “Relay GSE” or “Relay”) is a nationally recognized and accredited school of education that trains teachers, school leaders, and principals on the core elements of a concept developed by Relay known as Leverage Leadership. Leveraged Leadership is focused on improving student performance and teachers’ instructional practices through data collection and analysis. These steps lead to curriculum planning, a review of existing instructional practices, and development of potential options for improving instruction. School districts across the country rely on the Relay program to create evidence-based, data-driven instructional practices.

Based on my previous work in the Denver Colorado Public Schools (2012-2017), my work as Chief Academic Officer for KIPP (a nationwide organization for charter schools) (2018-2020) and my work at the Massachusetts DESE before I came to Saugus (2020-2021), I knew about Relay’s innovative programs. Because the Relay methodology is highly effective, over the course of several years in several different school systems and organizations across the country, I have recommended that dozens, if not hundreds, of school administrators enroll in Relay training programs.

For example, in 2014-2015, while I was an Instructional Superintendent with Denver Public Schools, Denver Public Schools formally partnered with Relay. At that time, I participated in the Relay training along with more than 20 other Instructional Superintendents in the newly forming National Principals Supervisor Academy. It was a job requirement to implement the Relay data/evidence practices in the Denver system. This was my first contact with Relay.

The training I participated in through Relay was intended to permit expansion of the reach of their PD program to more districts on a national level. I successfully used the practices I learned through Relay (weekly data meetings, observation, and student culture) in my region or cluster of schools within the Denver school system. Utilization of Relay by my region resulted in student growth of 5%, the highest growth among the elementary regions, from 2014-2016.

After the success in Denver, I was encouraged by my supervisor to apply for the Leverage Leadership Institute (“LLI”) for 2015-2016. LLI was a training program designed for leaders of schools performing in the top 10% of their district or state and to allow them to expand access to the methodology developed by Relay to other school leaders. In the following year, 2016-2017, and due to the results obtained with the Relay program, as the Associate Chief of Academics for Denver Public Schools, I was responsible for managing the Relay GSE relationship and continuing to expand the professional development programming within Denver Public Schools.

Since leaving Denver Public Schools, I have relied on my expertise in the Relay PD programs to bring that methodology, or to recommend it, throughout my career in large part due to the incredible, first-hand results I saw in Denver. At the KIPP Foundation, which operates a nationwide network of charter schools I relied on my experience with coaching PD sessions that Relay sponsored (known as triathlons) to lead Relay's PD programs at KIPP. When I returned to Massachusetts in 2020, I recommended Relay programs to districts from time to time, although I had no decision-making authority in terms of whether a district chose to work with Relay. I was pleased when Holyoke chose to engage Relay as part of its turnaround strategy with DESE to train all principals, although I was not part of that district's decision to do so.

While at DESE I applied for entrance into the doctoral program through a joint Mass DESE/Lynch School of Education program at Boston College. When I was selected for the Superintendentcy in Saugus in the late Spring of 2021, as part of the contract negotiation process with the Saugus School Committee, I disclosed that I would be participating in the BC program. The BC program in which I was enrolled meets mostly on weekends and for a multi-day in-person session in the summer. I also told the Committee that I had a limited teaching commitment at Columbia University in New York as an adjunct faculty member, which I wanted to complete. These were the only outside consulting commitments I anticipated when I entered into my contract, and the Committee was open to my pursuit of these outside commitments.

As of the Summer of 2021, I had not consulted for Relay since 2018.

The contract I signed contains language expressly acknowledging my participation in the Doctoral program at BC and the following language in section 10.2, permitting me to engage in consulting work:

10.2 Consulting/Teaching: The Superintendent may engage in professional consulting/teaching work provided that such consulting/teaching work does not interfere with or detract from the Superintendent's work as Superintendent for the Saugus Public Schools. The Superintendent must provide notice to the Committee Chair and use her vacation leave to cover her absences, if any, for such consulting/teaching work. The Committee shall not reimburse the Superintendent for any expenses associated with such consulting/teaching work.

I began my work as Superintendent in Saugus on July 1, 2021. Because of the time needed to do the work in Saugus and in the BC program, I stopped teaching and working at Columbia after the Spring of 2022.

While I did not seek out consulting opportunities, from time to time I was asked to provide coaching or training to educators. I believed these opportunities benefitted me as much as the educators involved, as they kept me sharp on current PD programs and practices. As those opportunities arose which I wished to pursue, I notified then Committee Chair Tom Whittredge during regular, but generally not scheduled, meetings we had in my District office. All such opportunities and any pay I received have been disclosed to Committee representatives.

Along these lines, and in connection with the explicit goal to vastly improve performance throughout the District, I obtained a proposal from Relay to provide year-long PD to administrative staff in Saugus, beginning the following summer in New York City. I was advised by District staff that in Massachusetts, c. 30B, sec. 1(22) exempts professional development or staff training from generally applicable requirements for bidding services. That said, I did explore alternatives locally, and determined they would be more expensive and less effective. I also explored having Relay come on site for training, which would also have been more costly.

Months after obtaining Relay's memorandum of understanding in August 2021, as set out above, I received a blast email asking prior LLI participants to coach for Relay over the following school year. I agreed to do so, primarily because I believed I would gain exposure to updated Relay materials and methodology that would help me facilitate its introduction to and implementation in Saugus Public Schools, which material I would otherwise need to access by being a paid participant in a Relay program. I was paid a total of \$1000.00 for the two, three-hour sessions on February 3 and 4, 2022. Consistent with my contract, I discussed this opportunity with the Chair when it arose, and to my memory, the Chair never asked for further notice or information. I put my coaching sessions on my District calendar which I posted routinely for public consumption outside of my office.

After the resignation of the former Chair, Vincent Serino came on as Chair in May 2022. I spoke to him, at length, on several occasions, about what we were trying to achieve by sending four Saugus leaders to be trained by Relay's leadership programs. I received no compensation from Relay in connection with this program. Saugus was charged the normal rate for these services. As part of those conversations with Mr. Serino, I shared that I had previously coached the Relay "triathlons" as part of the summer training and that it supported my own continued development. The compensation was nominal but the experience kept me current with the Relay practices.

In February 2022, I explored various ways to donate the fee for my time for February 3 and 4 to the Saugus Education Fund to defray the cost of teacher meals during their PD. I was told this was not possible, first by Relay who would not pay the Fund directly and then by the District who told me I could not donate the fee directly to the Fund. I have documentation of these communications which I have shared. Following these efforts, my family and friends contributed over \$2000.00 to the Fund to carry-out my intent to pay for food for faculty during PD. Mr. Serino, then Vice Chair of the Committee, wrote me an email on February 11, 2022, thanking me for arranging this gesture of support.

I was again asked by Relay in an email dated June 23, 2022, to coach in the summer of 2022 because they were short coaches, and I agreed to do so. One three hour session was June 30, 2022, and the other was July 28, 2022.

The total amount I received from Relay GSE for consulting during the 2021-22 school year was \$1875.00.

Due to the demands of my position in Saugus and the BC doctoral program, I have not coached anyone on behalf of any consulting group this school year (2022-23) and have not coached with Relay since July 28, 2022.

CONCLUSION

I had no financial interest in or with Relay when I began my work in Saugus. I had no financial interest in or with Relay when I negotiated a memorandum of understanding for administrators to participate in training in August 2021. I have no present or expected future financial interest in Relay or its activities. I disclosed in the 21-22 school year Relay's voluntary retention of me for about 12 hours of consulting time, at Relay's initiation, and actually tried to donate my fee to Saugus to offset costs of Saugus' PD programming.

On these facts, there is no real or reasonably construed conflict of interest under M.G.L. c.268A.

ERIN MCMAHON

PROFILE

Dynamic and effective school and district leader focused on improving educational outcomes for all students. Proven leader in increasing student performance and closing achievement gaps for at-risk students, especially among middle and high school students. Committed to data-driven decision making and teacher performance improvement, retention of exceptional personnel and collaborative decision-making. Strong relationship builder with a focus on diversity, equity and inclusion. Leader who has worked K-12, K-8 as a teacher and regional superintendent; assistant principal and principal, 6th – 12th grade, as well as Chief Academic Officer and as an advisor for the Commissioner of MA DESE. Experienced with project management and finance.

EDUCATION

Yale University

Bachelor of Arts, History

Yale University Women's Soccer Team, Ivy League Champions; Vice President, Pi Beta Phi Sorority

New Haven, CT

Cornell University

Master of Business Administration, Finance and Operations

Park Leadership Fellow; Alumni Class President; Founding Member of Alumni Board; Captain, Frozen Assets

Ithaca, NY

Pace University

Master of Science in Education Leadership

New Leaders for New Schools, Cohort 5

New York, NY

RELEVANT PROFESSIONAL EXPERIENCE

2020-present MA DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION Malden, MA

Senior Advisor to the Commissioner, Fall Implementation Lead

- Guiding the reentry process, making recommendations for health and safety, rapid response, and remote learning.
- Providing practical recommendations to district superintendents on how to plan for different models of learning.
- Monitoring the implementation and the quality of the reopening; tracking lead indicators of wellness/instruction.

2012-2018 DENVER PUBLIC SCHOOLS (207 schools served more than 90,000 students) Denver, CO

Associate Chief, Academics, and Innovation

- Participated in the Superintendent's Cabinet, district committees, community, and family engagement events.
- Supervised and coached team of 7 leaders responsible for a 500+ central academic team and \$44 million budget.
- Led responsive organizational change management through program evaluation, including feedback from stakeholders, that resulted in mid-year adjustments to curriculum, professional learning, staffing and budgets to drive academic growth. Teacher satisfaction with professional learning rates with this work grew from 51 to 97%, and the district had the largest one-year student achievement gains in Denver Public Schools history.
- Led the curriculum adoption process for more than 110 schools to ensure high quality standards-based content and instruction in alignment with the district strategic plan.
- Co-led an early literacy strategy that resulted in a 17% gain on READ Act assessments district-wide for K-3rd.
- Started a middle school pilot program at 3 schools to close opportunity gaps for African American boys.

2013-2016 Regional Superintendent – (14 schools served more than 6,200 students)

- Led 8 of 14 schools to outpace the district literacy and math growth rates by at least 10 points in one year.
- Supervised, evaluated and coached leaders at the highest performing school in the district and three Title I schools with growth over 20 points in reading
- Coached, modeled, and led instructional practices on data-driven instruction, observation, and school culture.
- Made difficult personnel decisions and action to improve student achievement. Then recruited and hired five new leaders and retained eight exceptional school leaders. Led monthly professional development for all leaders.
- Developed a wrap-around service team that provided targeted English Language Learner support; resulted in achievement gains ranging from 6 to 10% for students with IBPs, a 15% increase for second language students.

ERIN MCMAHON

2012-2013 DENVER PUBLIC SCHOOLS

Denver, CO

Director, Teacher Talent Management

- Supervised, evaluated, and coached a team of 17. Collectively responsible for the change management and implementation of a new centralized teacher performance evaluation system in the district resulting in a transformation of strategic hiring practices. Co-created new recruitment approaches that created a pre-screened candidate pool with three times the previous average of highly qualified candidates.
- Spearheaded a three-member team to negotiate contracts with the teachers' association (union) and the Chief Personnel Officer. Co-created the district's first Peer Assistance and Review appeal process.

2004 - 2012 NEW YORK CITY DEPARTMENT OF EDUCATION

New York, NY

Principal, Henry Street School for International Studies (served more than 500 students)

- Led a middle and high school that served more than 500 middle and high school students.
- Effectively supervised, evaluated and coached a team of 50 employees (40 teachers, 2 assistant principals, 3 secretaries, 3 school aides, school safety officers, and a parent coordinator) with a \$4 million school budget.
- Inspired and motivated staff to focus on inclusive teaching practices resulting in 10-to-20-point gains in the NY Regents exam in at least 4 exam categories. Passing this exam is a graduation requirement in New York State.
- Eliminated a \$20,000 deficit and created \$79,000 surplus in just one year through successful stakeholder engagement and new funding by city government and community organizations.
- Raised more than \$200,000 to create a new school-wide arts program, outfit 75% of students with 1:1 laptop.
- Selected as one of five high schools in the nation selected by The AfterSchool Corporation (TASC) to create and pilot a 6th -- 12th grade Extended Learning Time Program. Based on parent feedback, offered the program from 3:30 to 6 p.m. daily to meet childcare needs and support learning. Increased student attendance by 11%.
- Revamped virtually all school systems ranging from attendance to operations resulting in significant increases in school culture, climate and safety. Reduced suspensions over 100% (from 250 to 59 in one year alone).
- Evaluated and reorganized the special education program to ensure compliance with district, state and federal policies and increased high quality services to meet student needs and eliminate opportunity gaps.

2006 - 2008 William W. Niles Middle School (served 1,200 students)

New York, NY

Assistant Principal

- Led the talented and gifted program, which served 350 learners in a 1,200-student school.
- Supported students resulting in 20% of the class being accepted in Specialized High Schools in the city.
- Created community partnerships to develop over \$300K in scholarships for students from economically disadvantaged backgrounds to attend prestigious Catholic & private schools.
- Directed school data teams and professional learning to established achievement benchmarks, identify target students, use school-wide data, and increase the number of students who were proficient to 90% of the school.
- Provided professional learning to 100+ teachers and paraprofessionals on how use data to support ELLs
- Created new parent communication and engagement strategies resulting in 100% return of 1150 free and reduced lunch forms, which added \$30,000 to the annual school budget.

2005 - 2006 Eleanor Roosevelt High School (served 450+ students)

New York, NY

Principal Resident/New Leaders for New Schools

- Apprenticed at one of the top 100 schools in the nation (according to *U.S. World & News Report*).
- Co-developed the student advisory curriculum for the first graduating class at this high school.
- Supervised data teams, motivated staff and developed an innovative process for reviewing Financial Aid.

1995 - 1997 WASHINGTON, DC PUBLIC SCHOOLS

Washington, DC

Teacher, English as a Second Language, K-6, Rudolph Elementary (served 500 students)

- Taught 51 ESL students in English using data, culturally responsive pedagogy and differentiated rigorous grade level instruction, which resulted in 16 students gaining proficiency within two years.
- Coached girls' and boys' soccer teams for the national nonprofit America Scores, an after-school program.

ERIN MCMAHON

ADDITIONAL PROFESSIONAL EXPERIENCE

2018 – 2020 KIPP FOUNDATION (224 schools serving 115,000 students)

New York, NY

Chief Program Officer/Chief Academic Officer

- Reorganized direct reports and responsibilities to refine the work and focus. Shifted from supervising 4 people and collectively 65 employees to overseeing 3 additional employees and an \$17 million budget.
- Co-led a team of Chief Academic Officers to create a national academic strategic plan, focused on literacy and K-12 science technology, engineering and math (STEM).
- Evaluated the effectiveness of curriculum and conducted a \$6 million overhaul of the national writing curriculum.
- Oversaw the expansion of science curriculum to increase student participation in the K-12 STEM program.
- Reduced the budget by 17% percent (more than \$3 million) to meet organizational goals.

2017-present COLUMBIA UNIVERSITY – GRADUATE SCHOOL OF BUSINESS

New York, NY

Adjunct Professor, Education Leadership

- Teach a graduate level business courses in educational leadership that focuses on solving the human capital challenges of leading schools and school systems.
- Authored human capital cases focused on Newark, Success Academy and the NYC Teaching Fellows.

CERTIFICATIONS

- MA Department of Elementary and Secondary Education, Superintendents' License, Provisional, 2020-2025
- District of Columbia Elementary School (ESL, 1-6) - Alternative Teacher Certification, 1995-1997
- New York, Administrative (School Building License) K-12, 2005 – 2010 (Provisional); 2010-2015 (Permanent).
- National Principal Academy Fellowship, Relay Graduate School of Education, Certificate of Completion, 2015
- Leverage Leadership Institute, Relay Graduate School of Education, Gold-certified, 2016.
- Institute for Professional Excellence in Coaching, Master Practitioner, Energy Leadership Index, October 2018
- International Coach Federation, Professional Certified Coach, March 2019

PROFESSIONAL LEARNING

- Ernst and Young, Change Management (Business Change Implementation) Trainer, 1997 – 2001
- New Urban Schools Principals' Training, Harvard Graduate School of Education, January 2007
- New Leaders for New Schools, Assessment Pilot Team led by Kim Marshall, 2009 - 2012
- Aspen-Pahara Fellowship, Fall 2019 cohort

LANGUAGE

Novice Spanish writer; conversational Spanish speaker

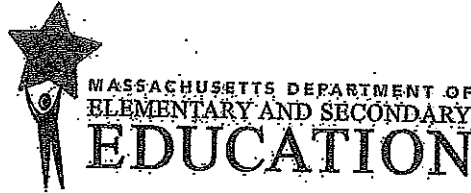
PRESENTATIONS AND PAPERS

- Presenter, *Using Data to Make Human Capital Decisions*, EduStat Conference, Ithaca, New York, July 2013
- Presenter, *Promising Strategies to Assist Teachers in Implementing the Common Core and Teacher Evaluation to Improve Instruction*, Council of Chief State Schools Officers, December 2013
- Columbia Caseworks: Newark Public Schools, Success Academy, and The New York City Teaching Fellows

COMMUNITY SERVICE

- Our Lady Star of the Sea, Marblehead, MA - parishioner

Saugus Public Schools Comprehensive District Review



This document was prepared by the
Massachusetts Department of Elementary and Secondary Education

Jeffrey C. Riley
Commissioner

Published November 2019

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District Review Report

Saugus Public Schools

Comprehensive review conducted March
18–21, 2019



Office of District Reviews and Monitoring

Massachusetts Department of Elementary and Secondary Education

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Executive Summary

The district is engaged in a physical transformation, as it creates new and totally renewed school buildings that will soon serve every student. In addition to its investment in its plant, the district is also making clear steps toward improvement in its literacy practices at the elementary level, leveraging partnerships with external resources and partners to increase the capacity of its educators, and increasing its efforts to support students at risk of not graduating. At the same time, the district faces challenges in planning, collaboration, instruction, curriculum, data use, educator evaluation, professional development, student support, and the allocation of resources. This report recommends a series of steps that can increase the district's capacity to ensure the learning success of all its students. These recommendations, outlined below and detailed in the body of the report, share an emphasis on placing student outcomes at the center of all planning and action, using data to drive improvement, developing the district's capacity to support students effectively, and investing in the development of educators.

The current building effort offers a powerful example of the challenge facing the district. In June 2017, after an extensive townwide campaign, voters overwhelmingly supported two debt exclusion votes, which committed the town to providing every student in the district a new or renovated school. As a part of this \$186 million building initiative for a new middle school-high school building and two fully renovated buildings that will house all elementary students, the town secured the substantial support of the Massachusetts School Building Authority (MSBA), which committed \$92.7 million of this funding. As the buildings come on line in school years 2021 and 2022, students and staff will experience substantial improvements in access to high-quality facilities and learning resources. The review team is impressed that the community would make so substantial and lasting a commitment to its children and to its schools, leveraging high levels of state support. Multiple staff, administrators, municipal leaders, families, and students expressed excitement and pride in these projects. Many leaders were observed dedicating time and effort to ensure the successful completion of the building and renovation projects.

Buildings are important, but no matter how fine they are, they cannot ensure student success. When the review team asked how they planned to improve student outcomes, multiple leaders and staff pointed to the pending state-of-the-art facilities in response, expressing the expectation that student outcomes would rise once school was underway in the new buildings. The review team found this trend problematic. Certainly, new and renovated facilities will offer students and educators much to build on, and widespread support from a community can affect the morale of a school or district. The review team has a deep appreciation for the degree of effort involved when any district takes on the construction of a new school, let alone when a district takes on the renovation or rebuilding of all its schools simultaneously—something that the review team has not seen before. The team also appreciates that this effort, which is being led by a lean administrative team, is taxing leaders' ability to attend to the things that will make the difference in student outcomes. Nonetheless, the team found little to indicate that the kinds of advancement needed in the district were likely to emerge from improvements in facilities, however substantial.

Saugus Public Schools Comprehensive District Review

Improvement in student learning outcomes derives from effective teaching and high expectations and comprehensive support for students, teachers, and school leaders. The review team was impressed by the urgent need for a series of changes in how leaders and staff do the planning, implementing, and evaluating of teaching and learning—the activities that are most likely to lead to better student outcomes. With all due respect to the enormity of the accomplishment that funding and completing the building projects represent, the review team's evidence, analysis, and concrete recommendations focus leaders and staff on how—as a part of their daily work, in the midst of this transformation—they can strengthen their practice to improve outcomes for all students.

Instruction

The team observed 64 classes throughout the district: 20 at the high school, 17 at the middle school, and 27 at the 4 elementary schools. The team observed 29 English language arts (ELA) classes, 17 mathematics classes, and 18 classes in other subject areas. Among the classes observed were three special education classes and one English language learner (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.

The quality of instruction in observed classes was inconsistent from class to class and school to school. While instruction at the elementary level demonstrated greater evidence of good practice, instruction at all three levels did not reliably provide students with clear learning objectives, create rigorous learning opportunities, focus on the development of higher-order thinking skills and respond to the diverse learning needs of all students. Instruction at the elementary level showed substantial evidence of student engagement, and the team observed many teachers at this level checking for understanding, providing feedback, and adjusting their instruction. The team found limited evidence of such practices in observed middle and high school classes.

Strengths

- Under the leadership of the school committee and the superintendent, the district partnered effectively with municipal leaders to increase the level of community support for the schools.
- At the elementary level, a research-based initiative has been established to develop a coherent approach to the delivery of writing instruction across the district's four elementary schools.
- The district is leveraging internal and external resources in a coordinated attempt to enhance and expand the professional capacities of teachers and school leaders.
- The district has increased support for students at risk of not graduating by hiring two wraparound counselors and establishing credit recovery options.

Saugus Public Schools Comprehensive District Review

- As part of a comprehensive restructuring of its educational model, the district has secured funding for construction of a new middle/high school building, an addition and renovations for another school, and renovations to one other school building. By 2021, all students will attend a new, renovated, or renovated/expanded school with up-to-date facilities.

Challenges and Areas for Growth

- District and school improvement plans are incomplete, unfocused, uneven in quality, and in some cases, nonexistent. There is limited evidence of strategic planning to drive improvement and assessment of progress toward the realization of outcomes.
- The school committee, central office, and school leaders have not established a culture of collaboration that focuses on improving teaching and learning and is infused with a sense of urgency.
- In observed classrooms, the quality of instruction was inconsistent districtwide.
- The district does not have a high-quality, standards-aligned, documented curriculum; a regular curriculum review and revision process; and a sufficient number of people empowered to exercise curriculum leadership.
- The district's data collection and analysis system is incomplete and inconsistent.
- The district does not use data systematically to improve teaching, learning, and decision-making, and to inform key stakeholders.
- The district's educator evaluation system does not ensure that educators receive high-quality feedback¹ that helps them to improve their practice.
- The district's professional development program is not informed by student and educator data, aligned with district and educator goals, and focused on student outcomes.
- The district does not have a proactive tiered system of targeted academic and other support to meet the needs of all students, based upon data-driven decision-making and progress monitoring.
- The district has not established a positive behavioral system with an ongoing data-monitoring process to evaluate progress.
- Many principals, teachers, and students expressed concern and frustration with the history of allocation of financial resources, which they stated has led to an inadequate deployment of staff, both at the leadership level and in key school-based roles, and insufficient provision of learning materials, textbooks, and supplies.

¹ High-quality feedback is specific, timely, and actionable.

Saugus Public Schools Comprehensive District Review

- The district's budget documents for fiscal year 2019 and fiscal year 2020 do not include key information that connects improvement planning and student performance to the allocation of resources, nor do they include all available resources, such as grants and revolving accounts. In addition, the district and the town do not have an up-to-date and signed written agreement on municipal expenditures in support of the district.
- The district and the town do not have a comprehensive plan to improve and maintain its buildings and to ensure the effective use of buildings and operational systems. Staffing of facilities is incomplete.

Recommendations

- The district should ensure that its planning documents drive the development, implementation, and modification of educational programs and practices.
- The district should develop a robust emphasis on collecting, using, and sharing student data within all leadership teams, focusing team meetings on educational goals and improvement strategies, and building a sense of urgency.
- The district should ensure that all teachers have access to high-quality, comprehensive, standards-based, and horizontally and vertically aligned curricula, and the support needed to implement the curricula effectively. The district should develop and implement an ongoing curriculum review and revision process.
- The district should ensure that all teachers provide effective standards-based instruction that challenges and supports all students. A focus on instructional improvement should drive districtwide and school-based planning, professional learning and coaching, collaboration and common planning time, and educator evaluation.
- The district should develop uniform and integrated policies for the efficient and purposeful collection, use, and sharing of data to improve teaching, learning, and decision-making.
- The district should fully implement all components of the educator evaluation system, with a particular emphasis on ensuring that all educators receive high-quality feedback.
- The district should build a professional development program that is informed by data and includes well-defined, measurable goals that are aligned with district, school, and educator goals.
- The district should develop and implement a formal tiered system of support.
- The district should adopt a multi-tiered positive behavioral intervention and support system and provide professional development to help district and school leaders, teachers, and support staff to implement it across the district.

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- The district should strengthen its efforts to improve student attendance and reduce the need to rely on suspension as a response to misconduct.
- The district should review whether its current allocation of resources effectively meets the goals and priorities needed to improve students' performance, opportunities, and outcomes, and reallocate resources as necessary.
- The district should develop a clear, comprehensive budget document that details how the budget supports district and school goals, how much schools and programs cost, and how outside funds are used. The district and the town should formalize in writing their agreement on municipal expenditures that are provided to the district.
- District administrators and town officials should develop a long-term capital improvement plan, as well as a preventative maintenance manual.

Saugus Public Schools District Review Overview

Purpose

Conducted under Chapter 15, Section 55A of the Massachusetts General Laws, comprehensive 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 (DESE): 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. In addition to providing information to each district reviewed, DESE uses review reports to identify resources and/or technical assistance to provide to the district.

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, students, and students' families. Team members also observe classroom instruction. Subsequent to the onsite review, the team meets for two days to develop findings and recommendations before submitting a draft report to DESE. DESE edits and fact-checks the draft report and sends it to the district for factual review before publishing it on the DESE website.

Site Visit

The site visit to the Saugus Public Schools was conducted from March 18–21, 2019. The site visit included 37 hours of interviews and focus groups with approximately 90 stakeholders, including school committee members, district administrators, school staff, students, students' families, teachers' association representatives, and external coaches. The review team conducted 3 focus groups with 5 elementary-school teachers, 19 middle-school teachers, and 15 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, attendance, and expenditures. The team observed classroom instruction in 64 classrooms in 6 schools. The team collected data using DESE's Instructional Inventory, a tool for recording observed characteristics of standards-based teaching. This data is contained in Appendix C.

District Profile

Saugus has a town manager form of government and the chair of the school committee is elected. The member receiving the most votes in the school committee election is customarily elected chair, although this practice is not always followed. The five member school committee meets twice monthly from September through June, except in December and February when it meets once. The school committee usually does not meet in July and August.

The current superintendent has been in the position since July 1, 2016. The district leadership team includes the superintendent, the executive director of curriculum, instruction, and accountability, the executive director of pupil personnel services and special education and the executive director of finance and administration. Between 2013 and 2018, the number of central office positions declined 23 percent, and these four leaders are the only central office staff. The district has six principals leading six schools. There are five other school administrators, two vice-principals at the middle school, two assistant principals at the high school, and a guidance director at the high school. In the 2018–2019 school year, there were 202.8 FTE teachers in the district.

In the 2018–2019 school year, 2,609 students were enrolled in the district's 6 schools:

**Table 1: Saugus Public Schools
Schools, Type, Grades Served, and Enrollment*, 2018–2019**

School	Type	Grades Served	Enrollment
Veterans Memorial Elementary School	ES	Pre-K–5	524
Lynnhurst Elementary School	ES	K–5	282
Oaklandvale Elementary School	ES	K–5	241
Waybright Elementary School	ES	Pre-K–5	229
Belmonte Middle School	MS	6–8	634
Saugus High School	HS	9–12	699
Total	6	Pre-K–12	2,609
*As of October 1, 2018			

Between 2014 and 2018 overall student enrollment decreased by 7.6 percent, from 2,850 in 2014 to 2,609 in 2018. Enrollment figures by race/ethnicity and high needs populations (i.e., students with disabilities, economically disadvantaged students, and English learners (ELs) and former ELs) as compared with the state are provided in Tables B1a and B1b in Appendix B.

The total in-district per-pupil expenditure was higher than the median in-district per-pupil expenditure for 48 K–12 districts of similar size (2,000–2,999 students) in fiscal year 2017: \$15,487 as compared with

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\$14,595 (see District Analysis and Review Tool Detail: Staffing & Finance). Actual net school spending has been well above what is required by the Chapter 70 state education aid program, as shown in Table B3 in Appendix B.

Student Performance

Note: The Next-Generation MCAS assessment is administered to grades 3–8 in English language arts (ELA) and mathematics; it was administered for the first time in 2017. (For more information, see <http://www.doe.mass.edu/mcas/parents/results-faq.html>.) The MCAS is administered to grades 5 and 8 in science and to grade 10 in ELA, math, and science. Data from the two assessments are presented separately because the tests are different and cannot be compared.

**Table 2: Saugus Public Schools
Accountability Percentile, Criterion Reference Target (CRT) Percentage, Reason for Classification**

School	Accountability Percentile	CRT Percentage	Overall Classification	Reason For Classification
Lynnhurst	73	81%	Not requiring assistance or intervention	Meeting targets
Oaklandvale	46	43%	Not requiring assistance or intervention	Partially meeting targets
Veterans Memorial	53	87%	Not requiring assistance or intervention	Meeting targets
Waybright	51	25%	Not requiring assistance or intervention	Partially meeting target
Saugus Middle	9	8%	Requiring assistance or intervention	In need of focused/targeted support: Among the lowest performing 10% of schools and low subgroup performance for White students and high needs students
Saugus High	23	57%	Not requiring assistance or intervention	Partially meeting targets
District	—	31%	Not requiring assistance or intervention	Partially meeting targets

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**Table 3: Saugus Public Schools
Next-Generation MCAS ELA Scaled Scores Grades 3–8, 2017–2018**

Group	N (2018)	2017	2018	Change	State (2018)	Above/Below
African American/Black	57	492.6	491.8	-0.8	490.3	1.5
Asian	47	501.5	506.2	4.7	511.6	5.4
Hispanic or Latino	222	495.4	493.6	-1.8	489.7	3.9
Multi-Race	32	500.9	499.4	-1.5	507.8	6.9
White	882	499.1	497.2	-1.9	504.2	7.0
High Needs	617	493.1	490.2	-2.9	490.1	0.1
Econ. Dis.	405	494.8	491.7	-3.1	490.2	1.5
SWD	244	481.6	482.1	0.5	480.8	1.3
EL	151	489.4	489.4	0.0	488.4	1.0
All	1,249	498.5	496.6	-1.9	500.5	3.9

Next Generation MCAS Achievement Levels: 440–470 Not Meeting Expectations; 470–500 Partially Meeting Expectations; 500–530 Meeting Expectations; 530–560 Exceeding Expectations

**Table 4: Saugus Public Schools
Next-Generation MCAS Math Scaled Scores Grades 3–8, 2017–2018**

Group	N (2018)	2017	2018	Change	State (2018)	Above/Below
African American/Black	59	488.7	487.1	-1.6	486.9	0.2
Asian	47	510.3	510.0	-0.3	514.3	4.0
Hispanic or Latino	224	495.7	494.6	-1.1	487.4	7.2
Multi-Race	32	501.6	494.9	-6.7	499.7	4.8
White	885	500.1	499.1	-1.0	501.8	2.7
High Needs	621	491.9	491.0	-0.9	488.2	2.8
Econ. Dis.	410	493.7	492.3	-1.4	487.7	4.6
SWD	243	482.1	482.1	0.0	479.2	2.9
EL	151	492.3	492.1	-0.2	488.5	3.6
All	1,256	499.3	498.0	-1.3	498.4	0.1

Next Generation MCAS Achievement Levels: 440–470 Not Meeting Expectations; 470–500 Partially Meeting Expectations; 500–530 Meeting Expectations; 530–560 Exceeding Expectations

**Table 5: Saugus Public Schools
Next-Generation MCAS ELA Percent Meeting or Exceeding Expectations Grades 3–8, 2017–2018**

Group	N (2018)	2017	2018	Change	State (2018)	Above/Below
African American/Black	57	27%	33%	6	31%	2
Asian	47	57%	64%	7	71%	7
Hispanic or Latino	222	45%	37%	-8	31%	6
Multi-Race	32	52%	44%	-8	54%	10
White	882	47%	44%	-3	58%	14
High Needs	617	32%	31%	-1	31%	0
Econ. Dis.	405	39%	33%	-6	32%	1
SWD	244	11%	14%	3	12%	0
EL	151	31%	33%	2	30%	3
All	1,249	47%	43%	-4	51%	8

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**Table 6: Saugus Public Schools
Next-Generation MCAS Math Percent Meeting or Exceeding Expectations Grades 3–8, 2017–2018**

Group	N (2018)	2017	2018	Change	State (2018)	Above/Below
African American/Black	59	22%	32%	10	26%	6
Asian	47	80%	72%	-8	74%	-2
Hispanic or Latino	224	41%	37%	-4	27%	10
Multi-Race	37	60%	41%	-16	49%	-5
White	885	49%	48%	-1	55%	-7
High Needs	624	32%	31%	-1	28%	3
Econ. Dis.	410	37%	33%	-4	27%	6
SWD	248	11%	15%	4	14%	-1
EL	151	39%	36%	-3	30%	6
All	1,256	48%	46%	-2	48%	-2

**Table 7: Saugus Public Schools
MCAS ELA Percent Scoring Proficient or Advanced in Grade 10, 2017–2018**

Group	N (2018)	2017	2018	Change	State (2018)	Above/Below
African American/Black	8	—	—	—	85%	—
Asian	9	—	—	—	95%	—
Hispanic or Latino	28	89%	82%	-7	78%	4
Multi-Race	1	—	—	—	93%	—
White	114	89%	91%	2	94%	-3
High Needs	73	77%	78%	1	79%	-1
Econ. Dis.	48	86%	83%	-3	81%	2
SWD	23	45%	57%	12	69%	-12
EL	12	—	75%	—	64%	11
All	161	89%	90%	1	91%	-1

**Table 8: Saugus Public Schools
MCAS Math Percent Scoring Proficient or Advanced in Grade 10, 2017–2018**

Group	N (2018)	2017	2018	Change	State (2018)	Above/Below
African American/Black	8	—	—	—	60%	—
Asian	9	—	—	—	91%	—
Hispanic or Latino	29	58%	66%	8	56%	10
Multi-Race	1	—	—	—	78%	—
White	113	69%	69%	0	85%	-16
High Needs	74	49%	50%	1	57%	-7
Econ. Dis.	49	58%	55%	-3	59%	-4
SWD	23	10%	26%	16	40%	-14
EL	12	—	67%	—	44%	23
All	161	69%	69%	0	78%	-9

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**Table 9: Saugus Public Schools
MCAS Science Percent Scoring Proficient or Advanced in Grades 5, 8, and 10, 2015–2018**

Group	N (2018)	2015	2016	2017	2018	4-yr Change	State (2018)
African American/Black	27	32%	37%	30%	37%	5	30%
Asian	23	61%	48%	48%	57%	4	63%
Hispanic or Latino	75	44%	39%	29%	40%	-4	30%
Multi-Race	9						54%
White	434	52%	44%	50%	43%	-9	60%
High Needs	265	33%	28%	29%	29%	4	31%
Econ. Dis.	166	40%	32%	33%	32%	-8	32%
SWD	111	15%	3%	14%	14%	1	21%
EL	51	12%	27%	24%	35%	23	20%
All	570	50%	43%	46%	42%	8	53%

**Table 10: Saugus Public Schools
Next-Generation MCAS ELA Percent Meeting or Exceeding Expectations in Grades 3–8, 2017–2018**

Grade	N	2017	2018	Change	State (2018)	Above/Below
3	178	54%	56%	2	52%	4
4	214	48%	50%	2	53%	3
5	214	58%	59%	1	54%	5
6	216	46%	38%	-8	51%	13
7	207	37%	26%	-11	46%	-20
8	220	38%	31%	-7	51%	-20
3-8	1,249	47%	43%	-4	51%	-8

**Table 11: Saugus Public Schools
Next-Generation MCAS Math Percent Meeting or Exceeding Expectations in Grades 3–8, 2017–2018**

Grade	N	2017	2018	Change	State (2018)	Above/Below
3	177	58%	54%	-4	50%	4
4	215	51%	48%	-3	48%	0
5	214	50%	57%	7	46%	11
6	217	55%	46%	-9	45%	1
7	212	42%	25%	-17	46%	-21
8	224	35%	27%	-8	50%	-3
3-8	1,256	48%	46%	-2	48%	-2

**Table 12: Saugus Public Schools
MCAS Science Percent Scoring Proficient or Advanced in Grades 5, 8, and 10, 2015–2018**

Grade	N (2018)	2015	2016	2017	2018	4-yr Change	State (2018)
5	214	47%	47%	42%	49%	2	47%
8	224	38%	26%	35%	24%	-17	35%
10	135	70%	66%	68%	68%	-2	74%
All	570	50%	43%	46%	42%	8	52%

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**Table 13: Saugus Public Schools
English Language Arts and Math Mean Student Growth Percentile, 2018**

Grade	ELA			Math		
	N (2018)	2018	State 2018	N (2018)	2018	State (2018)
3	--	--	--	--	--	--
4	194	42.2	50.0	195	47.1	50.1
5	197	57.1	50.1	197	65.1	50.0
6	201	51.2	50.1	202	49.9	50.0
7	184	32.5	50.0	187	29.1	50.0
8	209	41.5	50.0	210	48.3	50.0
10	141	36.6	49.9	141	45.7	49.9

**Table 14: Saugus Public Schools
Next-Generation MCAS ELA Percent Meeting or Exceeding Expectations by School and Grade, 2018**

School	3	4	5	6	7	8	3-8
Lynnhurst	61%	68%	71%	--	--	--	67%
Oaklandvale	68%	36%	61%	--	--	--	53%
Veterans Memorial	57%	49%	55%	--	--	--	54%
Waybright	43%	56%	60%	--	--	--	54%
Saugus Middle	--	--	--	38%	26%	32%	32%
District	56%	50%	59%	38%	26%	31%	43%
State	52%	53%	54%	51%	46%	51%	51%

**Table 15: Saugus Public Schools
Next-Generation MCAS Math Percent Meeting or Exceeding Expectations by School and Grade, 2018**

School	3	4	5	6	7	8	3-8
Lynnhurst	51%	63%	65%	--	--	--	60%
Oaklandvale	74%	48%	58%	--	--	--	59%
Veterans Memorial	49%	49%	51%	--	--	--	49%
Waybright	54%	39%	65%	--	--	--	55%
Saugus Middle	--	--	--	46%	27%	48%	41%
District	54%	48%	57%	46%	25%	47%	46%
State	50%	48%	46%	47%	46%	50%	48%

**Table 16: Saugus Public Schools
MCAS ELA and Math Percent Scoring Proficient or Advanced in Grade 10, 2018**

School	ELA	Math
Saugus High	91%	70%
State	91%	78%

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**Table 17: Saugus Public Schools
MCAS Science Percent Scoring Proficient or Advanced by School and Grade, 2018**

School	3	4	5	6	7	8	10	Total
Lynnhurst	—	—	47%	—	—	—	—	47%
Oaklandvale	—	—	43%	—	—	—	—	43%
Veterans Memorial	—	—	47%	—	—	—	—	47%
Waybright	—	—	63%	—	—	—	—	63%
Saugus Middle	—	—	—	—	—	21%	—	21%
Saugus High	—	—	—	—	—	—	69%	69%
District	—	—	49%	—	—	21%	68%	42%
State	—	—	47%	—	—	35%	74%	52%

**Table 18: Saugus Public Schools
Next-Generation MCAS ELA Percent Meeting and Exceeding Expectations by School and Student Group, 2018**

School	All	High Needs	Econ. Dis.	S/W/D	EL	African American	Asian	Hispanic	Multi-race	White
Lynnhurst	67%	53%	56%	39%	50%	—	—	59%	—	68%
Oaklandvale	53%	45%	50%	23%	52%	—	—	56%	—	52%
Veterans Memorial	54%	39%	42%	6%	73%	57%	—	46%	—	54%
Waybright	54%	40%	34%	36%	45%	—	—	60%	—	53%
Saugus Middle	32%	19%	21%	7%	15%	19%	59%	25%	—	34%
District	43%	31%	33%	14%	33%	33%	64%	37%	44%	44%
State	51%	31%	32%	14%	30%	31%	71%	31%	54%	58%

**Table 19: Saugus Public Schools
Next-Generation MCAS Math Percent Meeting and Exceeding Expectations by School and Student Group, 2018**

School	All	High Needs	Econ. Dis.	S/W/D	EL	African American	Asian	Hispanic	Multi-race	White
Lynnhurst	60%	48%	41%	40%	44%	—	—	50%	—	61%
Oaklandvale	59%	48%	52%	27%	52%	—	—	61%	—	56%
Veterans Memorial	49%	35%	34%	13%	64%	43%	—	43%	—	50%
Waybright	53%	46%	48%	32%	64%	—	—	40%	—	52%
Saugus Middle	41%	23%	28%	5%	22%	21%	64%	31%	—	44%
District	46%	31%	33%	15%	36%	32%	67%	37%	44%	48%
State	48%	28%	27%	14%	30%	26%	74%	27%	49%	55%

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**Table 20: Saugus Public Schools
MCAS ELA and Math Percent Scoring Proficient or Advanced in Grade 10 by School and Student Group, 2015–2018**

School	ELA					Math				
	2015	2016	2017	2018	4-yr Change	2015	2016	2017	2018	4-yr Change
Saugus High	90%	91%	90%	91%	1	79%	70%	70%	70%	9
African American/Black	70%	--	--	--	--	70%	--	--	--	--
Asian	67%	91%	--	--	--	92%	82%	--	--	--
Hispanic	88%	94%	88%	85%	-3	84%	81%	59%	65%	-19
Multi-race	--	--	--	--	--	--	--	--	--	--
White	94%	89%	90%	92%	-2	77%	69%	71%	71%	-6
High Needs	80%	75%	80%	81%	1	65%	59%	51%	52%	-13
Econ. Dis.	85%	93%	91%	83%	-2	69%	75%	62%	54%	-15
SWD	52%	29%	53%	60%	8	27%	29%	11%	30%	3
EL	--	--	--	82%	--	--	--	--	73%	--

**Table 21: Saugus Public Schools
MCAS Science Percent Scoring Proficient or Advanced in Science by School and Student Group, 2015–2018**

School	N (2018)	2015	2016	2017	2018	4-yr Change
Lynnhurst	49	58%	57%	45%	47%	11
African American/Black	1	--	--	--	--	--
Asian	4	--	--	--	--	--
Hispanic	5	--	--	--	--	--
Multi-race	1	--	--	--	--	--
White	38	59%	57%	52%	45%	-14
High Needs	27	43%	41%	24%	37%	-6
Econ. Dis.	12	--	47%	20%	25%	--
SWD	12	--	--	--	33%	--
EL	8	--	--	--	--	--
Oaklandvale	31	52%	21%	49%	48%	4
African American/Black	--	--	--	--	--	--
Asian	1	--	--	--	--	--
Hispanic	6	--	--	50%	--	--
Multi-race	2	--	--	--	--	--
White	22	57%	26%	48%	55%	-2
High Needs	14	42%	30%	32%	36%	-6
Econ. Dis.	10	50%	--	37%	30%	-20
SWD	4	--	--	--	--	--
EL	6	--	--	--	--	--

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Veterans Memorial	85	38%	39%	32%	47%	9
African American/Black	4	--	40%	--	--	--
Asian	2	--	--	--	--	--
Hispanic	16	40%	50%	23%	50%	--
Multi-race	2	--	--	--	--	--
White	61	39%	36%	35%	46%	7
High Needs	44	20%	22%	14%	36%	16
Econ. Dis.	32	28%	23%	13%	38%	10
SWD	18	8%	0%	13%	6%	-2
EL	9	--	--	9%	--	--
Weymouth	40	58%	73%	64%	63%	5
African American/Black	2	--	--	--	--	--
Asian	2	--	--	--	--	--
Hispanic	4	--	--	--	--	--
Multi-race	1	--	--	--	--	--
White	30	63%	73%	65%	63%	0
High Needs	20	33%	53%	60%	60%	27
Econ. Dis.	9	--	50%	69%	--	--
SWD	10	--	--	--	40%	--
EL	5	--	--	--	--	--
Saugus Middle	248	39%	28%	36%	24%	18
African American/Black	11	--	31%	--	9%	--
Asian	6	--	--	--	--	--
Hispanic	21	27%	20%	10%	19%	-8
Multi-race	1	--	--	--	--	--
White	178	40%	28%	43%	22%	-18
High Needs	88	20%	19%	23%	7%	-13
Econ. Dis.	51	25%	22%	24%	12%	-13
SWD	38	4%	0%	13%	0%	-4
EL	16	--	--	9%	0%	--
Saugus High	133	70%	66%	69%	69%	1
African American/Black	8	--	--	--	--	--
Asian	8	75%	60%	--	--	--
Hispanic	21	67%	53%	54%	52%	-15
Multi-race	--	--	--	--	--	--
White	96	72%	69%	69%	72%	0
High Needs	58	53%	43%	48%	48%	-5
Econ. Dis.	42	57%	58%	59%	50%	-7
SWD	20	30%	14%	16%	30%	0
EL	6	--	--	--	--	--

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**Table 22: Saugus Public Schools
Four-Year Cohort Graduation Rates by Student Group, 2015–2018**

Group	N (2018)	2015	2016	2017	2018	4-yr Change	State (2018)
African American/Black	5	70.0	100.0	90.0	—	—	80.1
Asian	12	—	83.3	91.7	66.7	—	91.1
Hispanic or Latino	21	77.8	70.6	81.5	76.2	-1.6	73.8
Multi-Race, non-Hisp/Lat	2	—	—	—	—	—	86.5
White	114	89.5	87.3	90.1	87.7	-1.8	92.2
High-needs	63	76.7	71.4	85.2	76.2	-0.5	78.0
Economically Disadvantaged*	52	80.3	76.1	85.3	78.8	-1.5	77.4
SWD	19	66.7	61.9	85.7	52.6	-14.1	72.4
EL	5	—	—	—	—	—	64.1
All	156	86.6	86.4	89.2	84.0	-2.6	87.9

* Four-year cohort graduation rate for students from low-income families used for 2015 rates.

**Table 23: Saugus Public Schools
Five-Year Cohort Graduation Rates by Student Group, 2014–2017**

Group	N (2017)	2014	2015	2016	2017	4-yr Change	State (2017)
African American/Black	10	62.5	80.0	100.0	90.0	27.5	84.2
Asian	12	100.0	—	83.3	91.7	3.3	95.4
Hispanic or Latino	87	80.0	83.3	70.6	85.2	5.2	77.4
Multi-Race, non-Hisp/Lat	1	—	—	—	—	—	87.7
White	162	82.8	91.4	89.9	90.7	7.9	93.9
High-needs	108	70.3	80.2	79.3	86.1	15.3	83.0
Economically Disadvantaged*	102	72.7	81.6	78.9	86.3	13.6	82.0
SWD	28	50.0	76.2	81.0	85.7	35.7	76.8
EL	5	85.7	—	—	—	—	69.0
All	212	82.3	89.3	88.5	90.4	7.8	90.1

* Five-year cohort graduation rate for students from low-income families used for 2014 rates.

**Table 24: Saugus Public Schools
In-School Suspension Rates by Student Group, 2015–2018**

Group	2015	2016	2017	2018	4-yr Change	State (2018)
African American/Black	—	10.3	11.7	10.1	—	3.4
Asian	—	—	—	—	—	0.6
Hispanic or Latino	—	3.4	4.7	5.2	—	2.4
Multi-Race, non-Hispanic or Latino	—	—	—	9.0	—	2.3
White	1.3	4.3	3.8	5.0	3.7	1.4
High Needs	1.9	5.8	5.4	6.2	4.3	2.7
Economically disadvantaged*	2.3	6.1	7.1	7.3	5	2.9
SWD	2.0	7.7	6.3	6.5	4.5	3.3
EL	—	—	—	3.6	—	1.8
All	1.2	4.3	4.1	5.2	4	1.8

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**Table 25: Saugus Public Schools
Out-of-School Suspension Rates by Student Group, 2015–2018**

Group	2015	2016	2017	2018	4-yr Change	State (2018)
African American/Black	--	--	8.6	5.9	--	6.0
Asian						0.7
Hispanic or Latino	--	2.1	3.5	3.9	--	5.1
Multi-Race, non-Hispanic or Latino				9.0		3.3
White	2.0	1.9	2.9	2.4	0.4	1.4
High Needs	2.6	3.0	4.1	4.2	1.6	4.6
Economically disadvantaged*	3.0	3.1	5.1	4.7	1.7	5.4
SWD	2.5	4.9	4.6	4.1	1.6	5.8
EL	--	--	--	2.0	--	3.7
All	1.7	1.7	3.2	3.0	1.3	2.9

**Table 26: Saugus Public Schools
Dropout Rates by Student Group, 2015–2018**

Group	2015	2016	2017	2018	4-yr Change	State (2018)
African American/Black	3.4	0.0	0.0	3.7	0.3	2.9
Asian	0.0	8.3	2.5	3.2	3.2	0.6
Hispanic or Latino	2.6	4.0	1.2	4.1	1.5	4.5
Multi-Race, non-Hispanic or Latino	0.0			0.6	2.0	1.0
White	1.4	2.3	1.8	2.9	1.5	1.0
High Needs	3.8	3.8	2.6	4.1	0.3	3.6
Economically disadvantaged*	3.6	5.3	2.3	4.4	0.8	3.6
SWD	3.1	3.9	2.5	2.5	-0.6	3.4
EL	0.0	0.0	6.7	14.3	14.3	7.6
All	1.8	2.8	1.8	3.1	1.3	1.9

*Drop-out rates for students from low-income families used for 2014 rates.

**Table 27: Saugus Public Schools
Advanced Coursework Completion by Student Group, 2017–2018**

Group	N (2018)	2017	2018	Change	Target
African American/Black	11	--	--	--	--
Asian	17				
Hispanic or Latino	42	--	--	--	--
Multi-Race, non-Hispanic or Latino	2				
White	252	66.4	95.2	28.8	71.5
High Needs	107	41.3	96.3	55.0	48.3
Economically disadvantaged	73	46.8	100.0	53.2	55.9
SWD	33	21.7	84.8	63.1	27.2
EL	20	--	--	--	--
All	326	63.8	96.6	32.8	68.4

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**Table 28: Saugus Public Schools
Progress toward Attaining English Language Proficiency, 2017–2018**

Group	Non-high school					High school				
	N (2018)	2017	2018	Change	Target	N (2018)	2017	2018	Change	Target
EL	81	--	--	--	--	--	--	--	--	--
All	81	68.6	70.4	1.8	57.1	--	--	--	--	--

**Table 29: Saugus Public Schools
Chronic Absence Rates by Student Group, * 2017–2018**

Group	Non-high school					High school				
	N (2018)	2017	2018	Change	Target	N (2018)	2017	2018	Change	Target
African American/Black	77	--	--	--	--	29	--	--	--	--
Asian	87	--	--	--	--	39	--	--	--	--
Hispanic or Latino	323	--	--	--	--	116	--	--	--	--
Multi-race, non-Hisp./Lat.	41	--	--	--	--	6	--	--	--	--
White	1,195	13.6	14.6	-1.0	12.6	513	29.9	28.1	1.8	28.9
High needs	874	18.1	21.5	-3.4	16.2	299	39.7	38.5	1.2	37.8
Economically Disadvantaged	511	20.0	25.6	-5.6	17.4	181	47.1	44.8	2.3	44.5
SWD	308	16.9	16.9	0.0	14.5	90	42.3	34.4	7.9	39.9
EL	246	--	--	--	--	64	--	--	--	--
All	1,736	18.2	17.8	0.4	12.1	700	29.3	28.4	0.9	28.2

* The percentage of students absent 10 percent or more of their total number of student days of membership in a school

Leadership and Governance

Contextual Background

The district is emerging from a period of discontinuity and frequent transition in the role of superintendent. Five superintendents served during the interval between 2013 and 2016. The current superintendent's tenure of 2.75 years is the second longest in the past decade. In March 2019, the school committee formally extended the superintendent's contract for an additional three years, offering the prospect of more stable leadership.

The district has also experienced recent changes in central office and school leadership positions. At the time of the onsite in March 2019, two of the three central office leaders had served for less than two years; the middle school principal was in her second year; and two of the four elementary school principals were in their first year.

The district has few leadership positions. The central office consists of only four leaders: the superintendent and executive directors in finance and administration, pupil personnel services and special education, and curriculum, instruction, and accountability. There are no additional central office positions in curriculum, instruction, assessment, student support, facilities, and finance. The high school has two assistant principals and a guidance director, and the middle school has two vice principals; however, there are no team leaders, coaches, and department heads in the schools.

Within the context of these staffing constraints, the district has adopted a strategy of engaging external resource organizations and consultants as coaches, trainers, and strategists in critical improvement areas, such as elementary school literacy, the educator evaluation system, and instructional practices. Consultants have also been engaged to help with turnaround work at the middle school and the planning of work in data teaming.

A high proportion of district and school leaders have been hired from within. Of the 10 district leaders who work in the central office or lead a school, 5 attended the Saugus schools. Six have been employed in the Saugus schools for most of their careers, averaging twenty-two and one-half years as employees of the district.

Strength Finding

1. **Under the leadership of the school committee and the superintendent, the district partnered effectively with municipal leaders to increase the level of community support for the schools.**
 - A. In June 2017, two debt exclusion proposals amounting to 186 million dollars for new and renovated school buildings were approved by a 71 percent majority vote following a year of collaboration among the superintendent, the school committee, the town manager, and community partners.

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1. Subsequent to these votes, the Massachusetts School Building Authority (MSBA) approved \$92.7 million in funding for a new middle-high school.
- B.** Municipal officials, school committee members, and district leaders attributed the success of the debt exclusion initiative to community engagement and outreach efforts led by the superintendent, the town manager, the school committee chair, and others.
1. Over the course of the final year of this effort, district leaders, municipal officials, and community partners collaborated to make the case for the long-term benefits to the town of this investment and persuaded stakeholders, including families, business leaders, non-profit and community agencies, and civic associations, to support it.
 2. District leaders and municipal officials reported that the chair of the school committee, who also served as chair of the school building committee, formed a close working relationship with other district leaders, municipal officials, and community leaders.
 - a. Municipal officials expressed the view that the advocacy of district leaders, municipal officials, and community partners was critical to the success of the bond initiative. The bond issue will add 445 dollars to the annual tax bill for an average single-family home over a period of 30 years.
- C.** District leaders and municipal financial officials have worked collaboratively to increase community support for the schools.
1. The superintendent stated that his communication with the town manager has resulted in a strong professional association. The town manager reported that the superintendent collaborated with him and that they had a positive relationship.
 2. The town accountant and the town finance director reported that the executive director of finance and administration communicated regularly with them and that they all followed professionally accepted financial practices. This has increased confidence in district-municipal transactions.

Impact: By forging positive ties between the district and the town, working with community partners, and making the case for investment and change, district leaders and town officials have facilitated a large new investment in the town's schools, laying the foundation for improvements in the quality of student learning experiences and academic outcomes.

Challenges and Areas for Growth

2. District and school improvement plans are incomplete, uneven in quality, and in some cases, nonexistent. There is limited evidence of strategic planning to drive improvement and assessment of progress toward the realization of outcomes.

A. The district does not have a current district improvement plan (DIP) that details the work that will be done to improve educational programs and practices.

1. A two-page draft document entitled *District Plan Overview 2018–2021* consists of a mission statement, a vision statement, a theory of action, values, strategic objectives, and outcomes. While this document provides a promising initial framework for strategic planning over a multi-year period, it does not include student outcomes, measures such as SMART goals,² and specific goals for any of the school years it encompasses. School Improvement Plans (SIPs) are not linked to the draft district plan.

2. When asked about a DIP or a strategic plan, district leaders referenced the Saugus Educational Plan, which was developed by the superintendent in January 2017 in fulfillment of a requirement for MSBA approval of the middle-high school building project. This document includes a detailed description of the limitations of each school's facilities, necessary improvements, and planned programmatic and curricular upgrades. The Saugus Educational Plan does not contain essential components of a DIP, including goals for improved student outcomes, specific improvements in academic performance, and a clear and explicit framework for improvement.

B. Some current SIPs detail specific goals for student outcomes and offer leaders a means for assessing progress toward these goals; however, most do not include essential components of effective SIPs.

1. The 2018–2019 Lynnhurst Elementary School SIP meets a high standard. This plan provides a detailed accounting of student outcomes for the prior school year as assessed by multiple measures; tracks school progress against clearly established benchmarks of progress; describes the school's analysis of why goals were not met, met, or exceeded; and lays out a detailed set of sequenced goals and objectives for the current school year, including timelines, clearly defined activities, persons responsible, and measurable outcomes.

a. Most significantly, each of the four SMART goals of the Lynnhurst SIP consists of identified target groups of students, concrete student outcomes, timelines, ties to specific measurements, and benchmarks.

2. No written goals, in any of the other SIPs or districtwide planning documents reviewed by the team were this complete.

² SMART goals are Specific and Strategic; Measurable; Action Oriented; Rigorous, Realistic, and Results Focused; and Timed and Tracked.

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3. The 2018–2020 Waybright Elementary School SIP tracks the school's progress toward fulfillment of the goals for the prior school year; documents gaps in student performance; identifies barriers to improvement; and lays out a clear plan for the 2018–2019 school year. The plan includes goals to improve instruction, teacher collaboration, home to school connections usage of technology, and student performance on open-ended questions. All of the goals are in SMART goal format; however, while most include action steps, persons responsible, and measures of progress, they often do not specify target groups of students, measures of performance, and timelines.
 4. The 53-page 2019–2020 SIP for the high school includes: comprehensive data on MCAS, graduation, attendance, dropout rates and other outcomes, an analysis of gaps in student achievement in ELA and math and among students with disabilities and English learners, and an analysis of the barriers to closing these gaps and strategies for improvement, including the idea of a Saturday Intervention Program to help students recover course credit. The SIP does include a set of charted objectives, but the specific benchmarks for the academic year are all focused on the process of setting up a schedule, or developing a program or administrative process, rather than on the student academic outcomes that it is intended to help achieve. The plan does not include any benchmarks or outcomes that target an identified level of improvement in student performance to be achieved, at any level, in any subject.
 5. The 2017–2018 Belmonte Middle School SIP established ambitious goals for improved student outcomes on the MCAS tests. These included reducing the proficiency gap between all students and students in the high needs group by one-half in English language arts (ELA), mathematics, and science and technology/engineering and enabling all students to achieve a Student Growth Percentile of 55 or higher. However, these goals were not supported by clear plans for changes in practice and the SIP did not have measurable benchmarks or plans for assessing students' incremental progress toward intended outcomes.
 6. The 2018–2019 Veterans Elementary School SIP consists of process action steps that the school plans to take, but is missing improvement targets, including specific educational outcomes for students.
- C. The Oaklandvale Elementary School and the Belmonte Middle School do not have current SIPs. The team was told that the Oaklandvale principal began in July of 2018, well after the period in which a SIP was normally prepared for the following school year, and did not have the benefit of a current SIP to work from. The middle school engaged in the turnaround planning process with the Statewide System of Support (SSoS) team in school year 2018–2019 and as part of that process had the benefit of a turnaround site visit by an external vendor. However, both Oaklandvale and Belmonte do not have a school or district-generated framework to inform and shape their work, assess their progress, and make changes.
- D. All the SIPS reviewed by the team are common in format; however, the district does not have a central, districtwide procedure for developing the DIP and ensuring the alignment of SIP goals with DIP goals.

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- E. Multiple interviews and a document review indicated that a number of the current efforts of the district were insufficiently documented.**

Impact: The absence of a DIP leaves school leaders and teams with little guidance and structure for aligning their planning efforts. It is hard for a district or a school to make sustained and meaningful progress without clear and focused plans, measurable goals linked to timelines, benchmarks, and persons and teams responsible and accountable for achieving outcomes. In such circumstances, leaders have great difficulty focusing and prioritizing their work, accurately accessing progress, and planning intelligently for next stages. Educators, families, students, and other stakeholders who do not have access to planning processes cannot meaningfully participate in setting the direction for and assessing the effectiveness of the work of the district and individual schools. As its multiple current initiatives unfold, some with ample reporting and others with a limited degree of documentation, the district leadership faces the challenge of developing the capacity to account for and present its improvement work in routine, reliable, and transparent ways.

- 3. The school committee, central office, and school leaders have not established a culture of collaboration that focuses on improving teaching and learning and is infused with a sense of urgency.**
- A.** Interviews with school committee members and staff and a review of school committee meeting minutes indicated that the school committee infrequently planned for, critically considered, and assessed progress toward the realization of student learning goals. Although the school committee reviews MCAS tests results annually, it rarely reviews any other student outcome data or monitors the impact of key improvement strategies on student performance.
- B.** Interviews with school committee members and other stakeholders and a review of school committee minutes indicated that the school committee was often preoccupied by conflict among members, communication issues between individual school committee members and the superintendent, and matters that were not the responsibility of the school committee, such as personnel.
1. Recently, the school committee instituted a policy prohibiting the participation of three or more members of the school committee in a social media interaction in compliance with the open meeting law. This policy was in response to members' frequent use of social media to communicate with each other about district-related matters.
- C.** School committee members have not recently engaged in a common set of formal learning, planning, or professional development experiences that would give them a shared approach to their responsibilities and work.
1. While some members of the school committee have attended Massachusetts Association of School Committees (MASC) trainings, the entire school committee has not participated in team development training, or conducted planning exercises to develop common expectations, norms, and practices.

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D. District and school leaders stated that their meetings focused almost entirely on logistical and managerial matters and updates that could be communicated by email or other means.

1. Leaders expressed disappointment that their work did not focus more on improvement practices and how to strengthen them.
2. Leaders reported that they rarely reviewed disaggregated student group data, including data on the performance of economically disadvantaged students, English learners, and students with disabilities.

Impact: A district is unlikely to achieve and sustain meaningful improvement without developing priorities, routines, and practices to ensure the stewardship of improvement work. Progress is impeded when leaders are not regularly and publicly focused on improvement goals, the school committee does not review student performance data regularly, and the leadership team's collaborative time focuses only intermittently on solving the learning and teaching challenges that confront staff and students.

Recommendations

1. The district should ensure that its planning documents drive the development, implementation, and modification of educational programs and practices.

A. Under the leadership of the superintendent, the district should convene a representative group of stakeholders to develop a District Improvement Plan (DIP).

1. The DIP should include measurable goals (including progress benchmarks and final outcomes).
 - a. The goals should be based on an analysis of historical, longitudinal, and current disaggregated data related to student performance, opportunities, and outcomes.
2. The goals should be SMART (Specific and Strategic; Measurable; Action Oriented; Rigorous, Realistic, and Results Focused; and Timed and Tracked).
3. The district should consider whether to build on the draft District Plan Overview 2018–2021.
 - a. This decision should be based in part on the extent to which the draft District Plan Overview reflects a careful review of data and wide input from district stakeholders.

B. Principals, in collaboration with school councils, should ensure that each school develops an annual School Improvement Plan (SIP) aligned with the DIP. Each SIP should include specific measures to determine the progress of school-based initiatives.

1. Similar to the DIP, these measures should be SMART.

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2. Leaders of schools with the longest and strongest tradition of producing effective SIPs could be invited to co-lead a session to help teams from other schools improve their planning practices.
- C. The district should develop a process for reviewing SIPs for quality and alignment with SIP goals, and for using the most recent student data to continually monitor and update district and school improvement plans.
 - D. District and school leaders should provide frequent, timely, and thorough information to the school committee, staff, students, families, and community on progress toward the achievement of plan goals.

Benefits: By developing, communicating, and using measurable goals based on an analysis of historical, longitudinal, and current disaggregated student data and other data sources, the district will ensure that it is focused on the most important areas for improvement. By making a commitment to the yearly amount of change that it plans to achieve, the district will be able to plan and regularly monitor the impact of key improvement strategies, instructional practices, and the use of resources on student performance, opportunities, and outcomes.

Recommended resources:

- DESE's *District Standards and Indicators* (<http://www.mass.gov/edu/docs/ese/accountability/district-standards-indicators.pdf>) identify the characteristics of effective districts in supporting and sustaining school improvement.
- The *Conditions for School Effectiveness Self-Assessment* (<http://www.mass.gov/edu/docs/ese/accountability/school-effect-self-assessment.pdf>) is a tool for conducting a scan of current practice, identifying areas of strength, and highlighting areas requiring greater focus.
- 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.
- DESE's *Planning for Success* tools (<http://www.doe.mass.edu/research/success/>) 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.
- *Focused Planning for Accelerating Student Learning* (<http://www.mass.gov/edu/docs/ese/accountability/dsac/focused-planning.pdf>) provides guidance for districts to accelerate achievement for all students through the development of a focused, actionable and sustainable Accelerated Improvement Plan (AIP).

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- *District Accelerated Improvement Planning - Guiding Principles for Effective Benchmarks* (<http://www.mass.gov/edu/docs/ese/accountability/turnaround/level-4-guiding-principles-effective-benchmarks.pdf>) provides information about different types of benchmarks to guide and measure district improvement efforts.
 - *What Makes a Goal Smarter?* (<http://www.doe.mass.edu/edeval/resources/presentations/SMARTGoals/Handout5.pdf>) is a description of SMART goals with accompanying examples. The handout was designed to support educators in developing goals as part of the educator evaluation system, but could also be a useful reference for the district as it develops or refines its DIP and SIPs.
 - *Turnaround Practices in Action* (<http://www.mass.gov/edu/docs/ese/accountability/turnaround/practices-report-2014.pdf>) is a practice guide that highlights practices and strategies observed in turnaround schools that have shown significant and rapid gains in student achievement. It presents key practices for consideration as avenues to improve and sustain ongoing and future turnaround efforts.
2. **The district should develop a robust emphasis on collecting, using and sharing student data within all leadership teams, focusing team meetings on educational goals and improvement strategies and building a sense of urgency.**
- A. School committee meetings should give high priority to reviewing and discussing student performance data and evidence and the results of educational initiatives.
 - B. All meetings held in the district, as a matter of course, should include consideration of student outcomes, and make deliberate use of student data.
 - C. In keeping with the new school committee policy about the use of social media, the district should ensure that its use of media and social media is consistent with its strategic purposes, and focuses on discussions of school and district improvement initiatives, student performance, and evidence of outcomes.

Benefits from implementing this recommendation include using planning and training time to analyze data, increasing the skills of district and school leaders and school committee members in using data to advance improvement work, using social and other media to inform stakeholders about district initiatives and student outcomes, and building the capacity of the district as a whole.

Recommended resources:

- *Advisory on School Governance* (<http://www.doe.mass.edu/lawsregs/advisory/cm1115gov.html>) explains state law as it applies to particular functions of school governance, and provides recommendations on the important role that each partner in this endeavor plays in advancing collaboration and school improvement.

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- The *District Governance Program* (<http://www.masc.org/field-services-2/district-governance-project>), provided by the Massachusetts Association of School Committees, is designed to focus on continuous improvement and to build understanding of the roles and responsibilities of the school committee and the superintendent.

Curriculum and Instruction

Contextual Background

The executive director of curriculum, instruction, and accountability is the one person in the district with a designated leadership role for curriculum. Elementary principals provide some oversight to curriculum in their schools. The district director's intended curricular responsibilities include oversight, revision, and implementation of the district's curriculum; however, he has additional responsibilities for a range of substantive district initiatives. With these factors considered, district-led curriculum practices are not robust.

Of the three levels in the district, the elementary level (Pre-K–5) has the most curricular consistency. For literacy, all four elementary schools follow the Pearson *Reading Street Program* and use a phonics program in kindergarten through grade 2, *Enhanced Core Reading Instruction* (ECRI), developed by HILL for Literacy. In addition, Keys to Literacy (KTL) has been providing professional development in writing over the course of two school years to all elementary teachers. For mathematics, the elementary level follows the *enVisions 2.0 Math Program*. While the elementary curriculum is achieving some coherence, *Reading Street* and *enVision 2.0* have both been found by EdReports to be insufficiently aligned to college- and career-ready standards and, as a result, are ineligible for review by DESE's CURATE project. There is little evidence of vertical alignment between the elementary- and middle-school levels.

Curricular practices at the middle school and the high school have been affected by an absence of content leadership, instructional coaches, team leaders, and department heads. For the most part, curriculum is teacher driven. Teachers use the standards and search for online resources. The district has not systematically addressed recent shifts in Massachusetts curriculum frameworks in ELA, math, and science. Existing curriculum documents are incomplete and many have not been updated. There is no centralized, consistent online access to curriculum. Although the superintendent's draft District Plan Overview 2018–2021 identifies the realignment of curriculum as one of its strategic initiatives, and the executive director of curriculum, instruction, and accountability confirmed the realignment of curriculum as one of his goals, at the time of the onsite in March 2019, the district had not made concrete plans to initiate this work.

The district does not have a 1:1 Chromebook policy, but has steadily increased the number of Chromebooks throughout the district to improve access. At the time of the onsite, the use of Google Classroom was developing in the district, but teachers reported that they needed more professional development and instructional technology support.

Common planning time (CPT) varies among the four elementary schools. Middle-school teachers meet once every six days as curriculum teams where they plan lessons and look for resources. At the high school, grade 9 and 10 teachers meet twice per week in CPT and the rest of the staff meets once a week for 35 minutes. While this time was designated to enable teachers to plan and discuss lessons, multiple teachers reported that they had to use it for preparing and duplicating materials. During the 2018–2019

school year, teacher-led professional learning communities (PLCs) at the middle school are reading and discussing a book on Universal Design for Learning (UDL).



At the time of the onsite, the district was analyzing whether enrollment in honors and advanced placement courses reflected the current student demographics. The high school worked with an external consultant a number of years ago to break down barriers for students to enter honors and advanced placement courses. The high school has a small academy for an advanced program of studies, which begins in grade 9, focuses on advanced placement courses, and has specific grade point average entry requirements; it enrolls fewer than 30 students.

In planning for the future middle/high school, the district decided that it would use 68-minute blocks throughout the school, and organized a team of 13 middle- and high-school teachers to begin to develop an approach to implementing this new system. This group of teachers has worked closely with an external consultant in a series of professional learning exercises focused on research-based instructional practices, such as the use of objectives, activators, "do nows," exit tickets, and summarizers. Using a train-the-trainer approach, the team has been modeling these instructional practices for middle- and high-school teachers during the district's five half-day professional development days.

Strength Finding

1. **At the elementary level, a research-based initiative has been established to develop a coherent approach to the delivery of writing instruction across the district's four elementary schools.**
 - A. Since the 2017–2018 school year, the district has partnered with Keys to Literacy (KTL), an external professional development (PD) provider, to build the capacity of elementary teachers to deliver high-quality writing instruction across the district's elementary schools.
 1. A document review and interviews with district and school leaders indicated that KTL consultants worked collaboratively with principals and teachers to plan and coordinate PD focused on writing instruction and the assessment of writing standards within all the district's elementary schools.
 2. District and school leaders reported that KTL consultants, whom district educators sometimes referred to as coaches, provided both coaching and PD in writing instruction to the district's elementary teachers in schools and during the district's five half-day PD days.
 - a. Typically, KTL consultants/coaches are assigned to an elementary school and grade level. In the morning, they go into classrooms, conduct observations of writing instruction, and provide feedback to teachers. They also use KTL writing strategies to model writing lessons and reflect with teachers. In the afternoon, they facilitate district grade-level meetings with teachers that principals also frequently attend.

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- i. Multi-grade groups are also formed to ensure the vertical alignment of writing instruction.
 - ii. Teachers reported that during the first year of working with KTL consultants, grade-level teams developed rubrics to score writing assessments.
- b. During the PD meetings, grade-level teachers review student work with the KTL consultants to monitor students' writing progress.
- B. Through the KTL initiative and the collaborative work of elementary teachers, the district has developed writing tools, and research-based writing practices are being implemented in classrooms.
- 1. Interviews and a document review indicated that elementary teachers were using writing rubrics and prompts that they developed collaboratively.
 - 2. During the 2018–2019 school year, KTL coaches have helped teachers incorporate research-based writing practices in their classroom instruction.
- C. The KTL initiative has supported the alignment of high-quality writing instruction across the district's elementary schools and has contributed to elementary teacher collaboration across the district.
- 1. Elementary principals reported that the KTL initiative has been valuable in increasing the horizontal alignment and cohesiveness of the writing program at the elementary level.
 - 2. Teachers said that they valued collaborating with other elementary teachers and found the cross-district meetings helpful.
 - 3. Three 2018–2019 elementary School Improvement Plans cite the importance of the KTL initiative in creating a coherent districtwide approach to writing that builds an effective and consistent delivery of writing instruction.
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Impact: By providing research-based support for written-language instruction that is consistently implemented across elementary schools and aligned both vertically and horizontally, the district ensures that its elementary students are likely to experience high-quality instruction that will lead to improved academic outcomes.

Challenges and Areas for Growth

2. In observed classrooms, the quality of instruction was inconsistent districtwide.

A. Focus Area #1: Learning Objectives & Expectations Although the use of learning objectives was being addressed in professional development for middle- and high-school teachers, the team found limited evidence of the practice in middle- and high-school classes. In fact, there was limited evidence of teachers ensuring that students understood what they were learning and why in most observed classes districtwide.

1. The review team found sufficient and compelling evidence that learning objectives were clearly explained (characteristic #2) in 48 percent of observed elementary classes, in 30 percent of middle-school classes, and in 40 percent of high-school classes.
 - a. In classes where the team found sufficient and compelling evidence of this practice, learning objectives were clear, carefully explained, and reinforced during the lesson. When asked, students in these classes could explain what they were doing and why.
 - b. In contrast, the team found that teachers did not effectively use learning objectives in most observed classes. Classroom objectives were not posted, not referenced during the lesson, and were not clear to students. For example, in one middle-school class observed at the start of the lesson, objectives were not posted or verbally shared with students. The teachers did not attempt to ensure that students understood the focus of the lesson or had a grasp of the relationship of what they would be learning to prior knowledge or instruction.
2. In 81 percent of observed elementary classes, in 29 percent of middle-school classes, and in 35 percent of high-school classes, the review team found sufficient and compelling evidence that teachers conducted frequent checks for understanding, provide feedback, and adjusted instruction (characteristic #4).
 - a. In most elementary classes, teachers conducted checks for understanding by circulating around the room and providing feedback to individual students, pairs, or groups. In a grade 1 mathematics class, the teacher asked students to walk her through how they solved a math problem. Teachers checked students' do now responses, or provided exit tickets at the end of lessons.
 - b. In contrast, in most observed middle- and high-school classes, the team found a limited range and use of effective strategies to check for student understanding. In these classes, teachers called only on volunteers, engaged the same students repeatedly, directed questions at the whole group, and sought and accepted one or two-word individual and group responses. In some observed classes, teachers never checked for understanding during the observation period.

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- i. The team observed only one use of an exit ticket in middle-school observations (n=17) and two in high-school observations (n=20). The team did not observe other strategies at these levels, such as think-pair-share or summarizers at the end of lessons to check for student understanding.

B. Focus Area #2: Student Engagement & Higher-Order Thinking Although school leaders at every level identified student engagement as a key instructional goal, only the elementary level showed sufficient evidence of student engagement. Districtwide, in most classrooms observed, students did not have sufficient opportunities to engage in challenging higher-order thinking skills.

1. In 78 percent of elementary classes and in 35 percent of both observed middle-school and high-school classes, the review team found sufficient to compelling evidence of students being engaged in the content of the lesson and having opportunities to be responsible for doing the thinking in the classroom (characteristic #5).
 - a. The team noted that students in most observed elementary classes were actively engaged in the content of the lesson. In these classes, students took ownership of learning while teachers acted as facilitators. Students wrote and shared their writing with partners, or completed math tasks that connected to the lesson objective on their own or with partners. In addition, in a number of classes, students were actively involved in hands-on science experiments.
 - i. For example, in a grade 5 science class, students conducted experiments at their desks, recording data to be used for making predictions and analysis.
 - b. Although the team noted examples of classes at both the middle and high schools where students were actively engaged in lesson content, in most observed classes at both levels, teacher-directed lessons dominated the modes of instruction. Teachers did most of the work—lecturing, reading to students, explaining and solving math problems—while students sat taking notes, listening, or copying text from the interactive white board. Expectations were not set for students to be active learners through initiative-taking, practice, or active inquiry. For example, in one high-school class where multiple students finished their project early, provision was not made to engage them in any follow-up learning task. They sat and did nothing.
 - i. Some students kept their heads on their desks without the teacher intervening or redirecting them. In other classes, students repeatedly checked their cell phones.
2. In 44 percent of observed elementary classes, in only 6 percent of middle-school classes, and in 25 percent of high-school classes, the review team found sufficient and compelling evidence of students having consistent opportunities to engage in tasks that required analysis, problem-solving, evaluation, or application of new knowledge.

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- a. At the elementary level, in classes with limited opportunities for students to develop higher-order thinking skills, students filled in worksheets, or completed tasks that focused on facts or comprehension. Teachers asked lower-level recall questions which did not require students to develop their thinking skills. In one observed class, the teacher did not give students a chance to answer her question before she provided the answer.
 - b. Similarly, in almost all observed middle-school classes, teachers did not effectively use questions to increase students' higher-order thinking skills. Teachers' questions were predominantly focused on lower-level thinking skills. In these classes, teachers did the explaining, not the students. The team noted a heavy use of worksheets and learning packets where students filled in answers. Overall, classes were characterized by low academic expectations. In one ELA class, the teacher read to students during the entire observation time without posing one probing discussion question that might have supported higher-order thinking.
 - c. The team found that in only 5 of the 20 observed high-school classes, teachers asked students challenging questions or gave them assignments that included analysis, synthesis, or evaluation. In most observed high school classes, including advanced courses, students were minimally engaged in higher-order thinking skills. In these classes, teachers' questions were predominantly lower-level recall questions or did not require students to explain their thinking. The team did not observe any examples of learning tasks such as debates, student designed projects, role-playing or student self-reflection. Instead, the focus was on correct answers. For example, in an advanced mathematics class, when students solved problems, the teacher did not set expectations for them to explain their answers.
- C. Focus Area #3: Inclusive Practices & Classroom Culture** Ensuring that lessons are designed to support and challenge students, regardless of the learning needs, was the least developed characteristic of effective instruction, districtwide.
1. In 30 percent of observed elementary classes, in 6 percent of middle-school classes, and in 10 percent of high-classes, the team saw sufficient and compelling evidence that lessons supported all students, regardless of their varied learning needs. The team did not find a single example of compelling evidence of this practice in observed middle- and high-school classes. The review team did not see a co-teaching model in any observed inclusion classes.
 - a. At the elementary level, in 8 of the 27 observed classes, the team notes that students' varied learning needs were addressed, either through the efforts of additional support personnel such as paraprofessionals, clustering of students in small groups with the teacher or in pairs with partners, or by the use of Chromebooks. However, in a majority of observed classes students were given the same assignments with no adjustments to product or process to meet their varied needs.

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- b. In almost all observed classes in the middle and high schools, the review teams found limited evidence that lessons were designed to meet students' varied learning needs. With the exception of three classes, in which students had choices in assignments and worked in small groups with the teacher's or paraprofessional's help, students were given the same assignment with little or no adjustments to meet their varied learning needs. The support of special education personnel was not maximized. For example, in an inclusion class observed at the high school, the special education teacher sat in a classroom chair and did not work with students while the teacher directed the lesson, missing an opportunity to give students the support that they needed.

Impact: When lessons do not consistently contain clear learning objectives, frequent checks for student understanding, active student engagement in rigorous learning opportunities, and support for students' varied learning needs, student learning outcomes are jeopardized. When the quality of instruction is limited, students are not being adequately prepared for college, career, and civic participation.

3. The district does not have a high-quality, standards-aligned, documented curriculum; a regular curriculum review and revision process; and a sufficient number of people empowered to exercise curriculum leadership.

A. The district does not have an updated and documented curriculum that teachers use to plan for instruction, or an established curriculum review and revision process that addresses vertical alignment. The district has not developed consistent, systemic processes to align curricula to the current Massachusetts curriculum frameworks.

1. School leaders and teachers told the review team that the district did not have consistent adopted curricula for most subjects K-12 that teachers, particularly middle- and high-school teachers, used to plan instruction. When the review team asked middle- and high-school teachers what curriculum materials they used to plan for instruction, they consistently stated that they had the standards, but did not have a written curriculum.
2. The team was told that formal curriculum revisions did not take place in response to the development of the 2016 Science and Technology/Engineering (STE) Curriculum Framework or the 2017 English Language Arts and Literacy (ELA) and Mathematics Curriculum Frameworks.
 - a. In its self-assessment submitted in advance of the onsite, the district provided an incomplete account of the status of curriculum alignment. The curriculum alignment narrative listed some out-of-date units, described the recent curriculum work of a social studies team and a wellness team, and referred to future planning without specifying how a standards aligned pre-kindergarten through grade 12 curriculum would be developed and revised.

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3. Interviewees reported that the district did not systematically address alignment with the 2016 STE Curriculum Framework. Instead, teachers were simply given a copy of the new science standards.
 - a. At the time of this review in March 2019, middle-school science teachers had begun work on aligning their curriculum with the STE framework and had met once with grade 9 science teachers to address vertical alignment. However, the elementary science curriculum had not been addressed, and principals and teachers described elementary science as inconsistent across the district.
 4. Teachers reported that the elementary level did not have a social studies curriculum. Recently, a social studies curriculum team consisting of teachers representing each level was formed to address the 2018 History and Social Science framework.
 5. Interviews with district leaders, school leaders, and teachers and a document review indicated that the district has not established a regular and consistent curriculum review process. In the district's self-assessment submitted in advance of the onsite, it rated curriculum selection and use as "Not at All Well" described by the indicator "The district implements regular, rigorous curriculum reviews that consider specific district needs as well as relevant research." (Possible ratings are "Very Well," "Well," "Somewhat Well," and "Not at All Well.")
 - a. School leaders and teachers consistently expressed a concern for the absence of vertical alignment at transition points in the district and in content areas throughout the grade levels.
- B.** With the exception of a district leader, there are no designated leadership roles for curriculum at any level in the district. Principals oversee curriculum in their schools at the elementary level, but it is not their primary responsibility. The middle school and high school do not have curriculum leaders, content specialists, and department heads.
1. Interviews with district leaders and teachers and a document review indicated that the district's executive director of curriculum, instruction, and accountability was solely responsible for the district's curriculum.
 - a. Multiple district leaders confirmed that the director was the district's chief curriculum officer, with responsibility for the oversight, implementation, and revision of the district's curriculum, with a focus on consistency throughout the district's six schools.
 - b. However, the director has additional responsibilities including, but not limited to, coordinating professional development, the district's educator evaluation system, federal grants, and all entitlement programs.
 2. The team was told that a reduction in district curriculum leadership roles began in 2013–2014 and continued for several years. School leaders and teachers reported that as a result

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the district did not have leadership, coordination, or infrastructure for curriculum build into district staffing. The district does not have academic directors, department heads, and instructional coaches. Principals reported that the district did not have STEM leadership to implement the new science standards.

- a. In interviews, school leaders and teachers consistently cited a pressing need for curriculum leadership at all levels.
3. Principals stated that although they did oversee the curriculum in their schools, they did not consider it a priority, given their multiple responsibilities. Elementary-school principals meet monthly in a professional learning community (PLC) where they collaborate on alignment of programs that are used districtwide for elementary ELA and mathematics.
 - a. The director does not regularly attend the principals' monthly PLCs where curriculum may be discussed, but does attend meetings with principals that are led by the superintendent. However, principals told the team that these meetings were mostly devoted to management rather than teaching and learning concerns.
- C. In response to an absence of curriculum leadership, and missing a formal process for revising and updating curriculum documents, teachers are creating their own curriculum by following the standards and searching for resources.
 1. Elementary teachers reported that they followed the adopted programs in ELA and mathematics. However, they have only the science standards. In the absence of a science curriculum and current textbooks, teachers select science materials individually or in informal groups.
 - a. Review team members noted that a science textbook used in one observed elementary classroom was not aligned with the 2016 STE framework, and the copyright date was 2006.
 2. When asked about how they were supported to implement high-quality, standards-based curriculum, middle-school teachers told the team they were not supported. With no overarching curriculum and limited resources, they said that the majority of teachers were using teacher-prepared materials developed during their planning time. They follow the standards and spend their prep time looking for online resources.
 3. When the review team asked high-school teachers about curriculum resources, they stated that they created curriculum day-by-day in their planning time and relied on their peers for curriculum support. For mathematics, a textbook with an online component was cited as a resource that one teacher used. Overall, teachers described their curriculum as individualized and curriculum as a priority to develop.

Impact: With limited curriculum leadership and curricular resources, teachers are unable to plan high-quality and rigorous standards-aligned instruction and assessment. Without a written curriculum aligned

with the current Massachusetts frameworks, the district cannot guarantee the horizontal and vertical alignment of the taught curriculum, which can result in major learning gaps for students, hindering their learning outcomes.

Recommendations

- 1. The district should ensure that all teachers have access to high-quality, comprehensive, standards-based, and horizontally and vertically aligned curricula and the support needed to implement the curricula effectively. The district should develop and implement an ongoing curriculum review and revision process.**
 - A.** With a sense of urgency, the district should produce a detailed plan for adopting or developing an updated and documented curriculum, particularly in core subjects at the middle school and high school, and science K–5.
 1. The district should continue to partner with the SSoS, including support from the Center for Instructional Support content specialists for assistance in curriculum selection, alignment, or development and for guidance to the district as it moves forward with curriculum development.
 2. The district should immediately form content teams of teachers in core subjects with grade-level representation, provide them with training and support to select a curriculum or develop scope and sequence documents and units of study.
 - B.** The district should carefully consider the need for additional curriculum and content support and determine how curriculum leadership can be provided at every level.
 - C.** The district should develop a process for the regular review and revision of curriculum.
 1. With support from SSoS, the district should identify comparable districts that have established an effective process for conducting curriculum reviews and draw on their examples to develop and tailor an effective curriculum review process for the district.
 - D.** The district should ensure that resources for hands-on science experiences for students are available to teachers so that they can implement lessons of the 2016 Science and Technology/Engineering Framework effectively.
 - E.** The district should continue providing support to the social studies curriculum team and ensure that resources to implement the new social studies curriculum are available to teachers at all levels.
 - F.** The district should consider providing teachers with easy access to its written curriculum, as it is developed, by creating an online designated curriculum platform where only documents which have been vetted by curriculum teams along with curriculum leaders are uploaded. These

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documents could include Massachusetts curriculum frameworks, scope and sequence documents that will be completed along with units of study, exemplar lesson plans, and lists of resources to support each unit of study.

Benefits: Implementing this recommendation will ensure that teachers and students have access to an updated, comprehensive, and clearly articulated curriculum that prepares students for success in high school and beyond. A more systematic approach to curricular practices, including the development of additional leadership to support the development, implementation, and regular revision of a newly written curriculum, will increase the district's capacity to improve student learning outcomes districtwide.

Recommended resources:

- DESE's Massachusetts Curriculum Frameworks web page (<http://www.doe.mass.edu/frameworks/>) provides information about the 2017 ELA/Literacy and Mathematics Frameworks, including grade-by-grade comparisons between the 2010 and 2017 Frameworks and a slide deck supporting implementation of the 2017 Frameworks.
- Quick Reference Guide: Establishing an Effective Science and Technology/Engineering (STE) Program (<http://www.doe.mass.edu/stem/ste/STEprogram.docx>): DESE has identified five components districts should attend to when designing a rigorous, coherent, and relevant pre-K-12 STE education program. Educators, administrators, and curriculum designers can refer to this guide for brief descriptions and resources for each component.
- DESE's Instructional Materials and Professional Development page (www.doe.mass.edu/candi/impd/) provides resources for improving and collaborating on curriculum, including quick reference guides and maps designed to facilitate cross-district communication about curriculum.
- EdReports.org (<http://www.edreports.org/>) provides free, independent reviews of K-12 education materials. The reviews focus on alignment to college and career ready standards and other indicators of high quality as recommended by educators.
- The CURATE Project (<http://www.doe.mass.edu/instruction/curate/>) convenes panels of Massachusetts teachers to review and rate evidence on the quality and alignment of specific curricular materials, then publish their findings for educators across the Commonwealth to consult. CURATE panels review only products that have already been found by an independent evaluation process to be partially or fully aligned to college- and career-ready standards.
- Quick Reference Guide: Aligning Curriculum to Massachusetts Standards (<http://www.doe.mass.edu/candi/impd/qrg-aligning-curriculum.pdf>) is designed to support teachers, coaches, administrators, and curriculum developers in the work of considering the ways in which curricular materials may diverge from the Massachusetts standards.

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- Quick Reference Guide: Assessing Your Curriculum Landscape (<http://www.doe.mass.edu/candi/impd/arg-assessing-curriculum.pdf>) is designed to support districts assess their curriculum landscape by asking three questions: (1) Do teachers have ready access to high-quality, standards-aligned curricular materials? (2) Do sustained and collaborative professional learning structures empower teachers to use those materials in ways responsive to their students' needs? (3) Are curriculum review processes regular, rigorous, and responsive to stakeholder input and needs?
- 2. **The district should ensure that all teachers provide effective standards-based instruction that challenges and supports all students. A focus on instructional improvement should drive districtwide and school-based planning, professional learning and coaching, collaboration and common planning time, and educator evaluation.**
 - A. Drawing on work that teachers and administrators are already doing in each school to improve instruction, a representative group of instructional leaders and teachers should convene to identify key instructional practices.
 - 1. The recommended product of these meetings is a set of expectations that focuses on the use of clear learning objectives and checking for understanding, increases student ownership of learning, challenges and engages students to develop and use higher-order thinking, and supports students' varied learning needs.
 - 2. The district should prioritize these instructional strategies as its "non-negotiables."
 - B. Once a set of instructional expectations has been defined, district leaders should develop a plan to share these expectations with staff. The district is encouraged to provide opportunities for educators to discuss ideas and strategies from these instructional priorities. These opportunities might include at instructional leadership team meetings, faculty meetings, PLC meetings, grade-level meetings, common planning time, and professional development days.
 - 1. The district should develop structures to support peer observation to model instructional feedback and encourage peer feedback.
 - a. Equitable opportunities should be provided by level for teachers to share best practices.
 - C. The district should consider establishing collaborative learning walks together with protocols for school leaders and teachers to identify district and school instructional trends in practice, calibrate ratings, and generalize feedback from these walkthroughs.
 - 1. The district should share trends in practice (strengths and areas for growth) with staff and use these trends to further discussions of best practice.
 - D. Teachers should receive appropriate guidance and feedback as they implement the district's instructional expectations.

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1. Professional development should focus on elements of the instructional expectations as applied to the specific curricula that teachers and students work with every day.
 2. Principals and other instructional leaders should ensure that teachers have the information and support necessary to meet the district's expectations for instruction.
 3. The district should provide teachers with high-quality feedback³ that helps them to improve instruction.
- E. The district should explore ways to develop instructional coaching models across the district.
- F. Administrators and teachers should take steps to ensure that planning documents and meeting and planning time in the district promote a shared expectation for meaningful instructional improvement. (See recommendations in the Leadership and Governance section of this report.)

Benefits: Implementing this recommendation will mean a deeper understanding of instructional strengths and challenge in the district, a stronger culture of professional growth and development, consistency and focus across the entire district related to instructional improvement, and instruction that focuses on challenging and engaging tasks with measurable outcomes for all students.

Recommended resources:

- DESE's *Calibration Video Library* (<http://www.doe.mass.edu/eval/resources/calibration/>) is a collection of professionally created videos of classroom instruction produced by the School Improvement Network. These videos depict a range of practice (this is NOT a collection of exemplars) to support within-district calibration activities that promote a shared understanding of instructional quality and rigor.
- DESE's *Online Calibration Training Platform* (<http://www.doe.mass.edu/eval/resources/calibration/>) uses videos of classroom instruction to simulate brief, unannounced observations. Groups of educators, such as a district leadership team, watch a video together and then individually assess the educator's practice related to specific elements from the Model Classroom Teacher Rubric and provide the educator with written feedback. Through real-time data displays, the group members can then see how their conclusions compare to each other, as well educators throughout the state.
- DESE's "What to Look For" Observation Guides (Updated August 2017) (<http://www.doe.mass.edu/frameworks/observation/>) describe what observers should expect to see in a classroom at a particular grade level in a specific subject area. This includes the knowledge and skills students should be learning and using (as reflected in state learning standards) and best practices designed to replace any evaluation system or tools districts currently use, but are a

³ High-quality feedback is specific, timely, and actionable.

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resource to help classroom observers efficiently identify what teachers and students should be experiencing in specific subjects and grade levels.

- DESE's Learning Walkthrough Implementation Guide (<http://www.mass.gov/edu/government/departments-and-boards/ese/programs/accountability/tools-and-resources/district-analysis-review-and-assistance/learning-walkthrough-implementation-guide.html>) 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. (The link above includes a presentation to introduce Learning Walkthroughs.)
- Appendix 4, Characteristics of Standards-Based Teaching and Learning: Continuum of Practice (<http://www.mass.gov/edu/docs/ese/accountability/dart/walkthrough/continuum-practice.pdf>) is framework that provides a common language or reference point for looking at teaching and learning.

Assessment

Contextual Background

Teachers and leaders have limited assessment data to inform their work. At the secondary level in particular, the review team found limited evidence of districtwide planning that prioritized the use of data to close achievement gaps, compare district performance with peer districts, identify areas for improvement, including student needs, and inform instructional planning. The district does not have the infrastructure and designated personnel needed to develop a data-rich culture.

Over the five years before the onsite in March 2019, school mid-level management positions have been steadily eliminated. As a result, critical roles that often support assessment work no longer exist, including teacher leaders, coaches, and department heads. The district is gradually building teams of teachers who volunteer to take on responsibility for projects that use data to advance teaching and learning. For example, a team of middle- and high-school teachers has worked to develop a long block of teaching time to be implemented at the new middle- and high-school complex. This group has recently begun exploring ways to exercise leadership in improving teaching practices. While the existence of such a team is a promising demonstration of an active interest in addressing the absence of designated leadership in curriculum, instruction, and assessment, this team is in the earliest stages of its work, and has not taken significant action on the assessment challenges that the district faces at the secondary level.

The district places a great deal of emphasis on the MCAS tests as an assessment tool, in part because for many students, it is the only assessment that is common to a grade level or a school. The MCAS tests results are referenced in almost all Saugus SIPs. The MCAS tests are a summative assessment of class and student group progress over a school year. However, the district does not administer formative assessments in core subjects at intervals throughout the year to supplement summative assessments as part of a systematic assessment program.

The Dynamic Indicators of Basic Early Literacy Skills (DIBELS) and DIBELS Next are administered in all four elementary schools in kindergarten through grade 5. Elementary literacy specialists administer the assessment three times annually. Specialists, classroom teachers, and some principals analyze the results and make decisions on Response to Intervention (RtI) provisions for students. Staff regularly monitor each student's progress during the year and adjust provisions as necessary.

Several years ago, the district standardized DIBELS data collection and management practices in order to ensure the validity of DIBELS data. Elementary school principals reported that they were able to rely on the quality and use of DIBELS data in a way that represented an improvement from the past.

During the 2018–2019 school year, middle-school staff began the administration of Renaissance 360 assessments in ELA and mathematics in grades 6, 7, and 8. Middle-school leaders and teachers expressed the expectation that assessments would provide actionable data in the future, but in the late

winter of the first year of implementation, interviewees said that early adoption challenges and inconsistency in the use of Renaissance 360 in the first year had hampered progress.

Staff at all levels do not have authority to establish assessment priorities, and plan and execute steps toward development.

Challenges and Areas for Growth

- 1. The district's data collection and analysis system is incomplete and inconsistent.**
 - A. Assessment data information in the district is inconsistently collected, uneven in quality, and limited in volume and usefulness.
 1. In addition to the MCAS tests, DIBELS is the only assessment in wide use across all the elementary schools in a uniform way. It is the only districtwide formative assessment administered at intervals throughout the school year to help teachers at the same grade level, and schools as a whole, plan and adjust instruction.
 2. Elementary schools administer the benchmark assessments from the *Pearson Reading Street* and *enVision math* programs; however, the team was told that the approaches varied: in some schools, teachers use the benchmarks directly from the programs, while in others teachers modify these benchmarks. The results cannot be compared because the benchmarks are not common.
 3. Common assessments in writing have been in place for several years at one elementary school and were recently introduced at the other three. It is difficult for the district to assess the impact of these assessments, however, because the writing assessments administered in each school differ and the results cannot be compared for meaningful analysis.
 4. In 2018–2019, the middle school began to administer Renaissance 360 assessments in ELA and mathematics in grades 6, 7, and 8. The team was told that the accuracy and completeness of the data was not certain, because educators were still learning how to make optimal use of the system, and not all teachers have become fully engaged in its use.
 5. At the middle school, teachers and administrators reported that benchmark assessments were most often developed and administered by individual teachers for their own classes. Because the instruments vary depending on the teacher, the results cannot be compared.
 6. At the high school, teachers are required to submit copies of their common mid-year and final examinations; however, there is no requirement that they submit their results. High-school teachers said that school leaders and departments relied heavily on the MCAS test results.

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7. At the high school, staff reported reliance on the analysis of the MCAS assessment by administrators and departments. MCAS is not an effective assessment tool for teachers seeking to adjust or improve their practice with an individual student, re-teach a lesson for students who may not have mastered the material, or challenge a current class of students with work that is intended to accelerate their progress based on their recent performance.
- B. In its self-assessment submitted in advance of the onsite, the district rated data selection as "Somewhat Well" described by the indicator "The district ensures that multiple sources of data are collected and that the data provides a comprehensive picture of student, school, and district performance." The district rated assessment methods as "Somewhat Well" described by the indicator "The district ensures that educators use a variety of informal and formal assessment methods, including formative assessments and common interim assessments. The assessments are aligned across grades and subjects and provide actionable information." Possible ratings are "Very Well," "Well," "Somewhat Well," and "Not at All Well."

Impact: When student, grade-level, school, and district outcomes and assessment data are limited, teachers, school and district leaders are deprived of the tools they need to determine the achievement of students and the impact of teaching practices. Without common benchmark assessments at each level, school and district leaders do not have a measure of the progress students are making in acquiring expected skills and knowledge during the course of the school year. Consequently, teachers and leaders cannot make informed instructional decisions, or act effectively to improve student achievement.

2. **The district does not use data systematically to improve teaching, learning, and decision-making, and to inform key stakeholders.**
 - A. District and school leaders reported that data from the MCAS tests, DIBELS, and Renaissance 360 served as the primary sources of academic data across the district. They said that limited leadership in the content areas and absence of infrastructure for curriculum development and revision impeded the development of a comprehensive and aligned common districtwide system of formative, benchmark, and summative assessments.
 1. Principals stated that the district's culture was not "data friendly." The review team was told that there were data teams in the schools at one time. Teachers said that there was a need to provide PD to enhance the capacity of staff to collect, analyze, and effectively use student academic assessment data.
 2. The superintendent expressed his intention to form a working relationship with an external partner organization with expertise in helping schools build data teams.
 - B. There is a disparity between the ratings of current assessment practices and capacities in the district's self-assessment, and the evidence the team gathered from interviews, observations, and documents provided by the district.

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1. In its self-assessment submitted in advance of the onsite, the district rated itself as performing "Somewhat Well," against the indicators of effective assessment practice.⁴ These indicators include data selection, assessment methods, data quality checks, district data use, and support for data use. The district noted that data quality checks, district data use, and support for data use were "emerging practices."
 2. The draft District Plan Overview 2018–2021 states that the district will "use uniform assessment to gauge student learning" under the strategic objective to "empower educational excellence across the district." However, the review team found limited evidence of districtwide planning that focuses on assessment in current school improvement plans, other documents, and in interviews. Inconsistency in the assessments administered continues to be a major limitation of the district's assessment system.
- C. The team found only one agenda item related to the sharing of student performance data in a review of 2018–2019 school committee meeting agendas through March 2019. This was the annual school committee review of the MCAS tests results in the fall.
- D. The district does not have the capacity to use data systematically to drive continuous improvement.
1. The review team was told that the district administrator responsible for curriculum, instruction, and accountability had limited authority to enact changes. Customarily, decisions about assessment practices are made at the school level, often by individual teachers.
 2. When asked about district use of data, principals reported that there was little commonality except for the use of MCAS tests and DIBELS results.
 3. The review team was told that few regularly scheduled meetings districtwide were devoted to assessment and data analysis.
 - a. One noted exception is that principals, literacy specialists, and teachers participate in regular DIBELS meetings at the elementary level.
 - b. Data meetings at the middle school, established as a regular practice in 2017–2018, have been replaced in 2018–2019 by the study of a book concerning instruction.
 - c. Teachers at all levels have common planning time; however, school leaders reported that because of the range of their responsibilities they were not often available to conduct and facilitate data discussions and the district did not have teacher leaders and department heads to act in this role.

⁴ Possible ratings are "Very Well," "Well," "Somewhat Well," and "Not at All Well."

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Impact: Without a system for the continuous collection, use, and sharing of student performance data, the district has a limited ability to make appropriate and timely adjustments to its programs, instruction, and professional development offerings. When the school committee receives and discusses only the annual MCAS tests results—and does not review and discuss other data and evidence of student outcomes—it limits its ability to monitor efforts to close the achievement gap, assess district progress over time, and compare the performance of the district with peer districts. Without a comprehensive set of assessments, educators do not have sufficient information to improve instruction and respond effectively to the diverse learning needs of all students.

Recommendation

- 1. The district should develop uniform and integrated policies for the efficient and purposeful collection, use, and sharing of data, and the routine use of formative assessment to improve teaching, learning, and decision-making.**
 - A.** The superintendent, principals, and teachers should develop specific strategies, timelines, and clear expectations for the use of data K–12.
 1. The district should ensure that educators at all levels use data strategically to inform instruction, ongoing curriculum revision, program evaluation, and the educator evaluation system.
 2. In building a system, the district should replicate practices that have worked and are in place in some parts of the district, such as the process used to standardize the collection of DIBELS data, and the uniform use of two DIBELS assessments and their results in all four elementary schools.
 - B.** The district should thoughtfully add additional formative assessments to its repertoire to ensure that it is measuring the range of student achievement.
 - C.** The district should ensure that teachers and administrators have regularly scheduled opportunities to review and analyze the collected data.
 - E.** The district should prioritize principals' responsibility to help teachers build data analysis skills and make regular use of assessment results in planning instruction.
 - F.** The district should ensure that assessment results are shared with students, teachers, and students' families.
 - G.** The district should provide ongoing, focused PD for all staff on the collection, analysis, and use of student performance data, and support principals and teachers with PD to build these practices into the structure of each school.

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Benefits: Using data collected from a variety of assessments made available in a coherent districtwide system, teachers and administrators have the opportunity to access and analyze student performance, opportunities, and outcomes to improve teaching learning, and the curriculum.

Recommended resources:

- DESE'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.
- DESE's *District Data Team Toolkit* (<http://www.doe.mass.edu/accountability/toolkit/>) 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.

Human Resources and Professional Development

Contextual Background

The district has begun to take some steps to improve certain components of its human resources and professional development (PD) systems. In an abbreviated draft document entitled "District Plan Overview 2018-2021," attracting and retaining qualified and effective staff is listed as a "Theory of Action." Principals and district leaders identified a newly developed and improved mentoring program as an example of a concrete step taken thus far to address this goal.

The need to create and provide meaningful PD in alignment with district programming initiatives was cited as a strategic objective in the same document. While the district is implementing a number of important and promising PD initiatives, the absence of a comprehensive PD plan with clear and measurable goals and objectives makes it difficult to identify the strategic linkages and accurately assess the overall effectiveness of these efforts.

District leaders stated that the primary means of achieving the goal of improving teaching and learning was the recent consultant-led, multi-year PD coaching program focused on improving principals' evaluative competencies. Although the full benefits of this program were not evident in the review team's review of educator evaluation documents, there was general agreement among district principals that this program was beginning to improve their capacity to supervise and evaluate teachers more effectively.

Strength Finding

- 1. The district is leveraging internal and external resources in a coordinated attempt to enhance and expand the professional capacities of teachers and school leaders.**
 - A.** The district is accessing and allocating available resources in an attempt to create improved academic opportunities, achievement, and outcomes for students. It is doing so by providing focused training and strategic support for district leaders, teachers, and principals.
 1. To support the implementation of the new 68-minute instructional block at the middle and high schools in 2019–2020, the district contracted the services of a consultant to work with teachers and principals from both schools. Interviewees reported that a committee of teachers from grades 6 through 12 collaborated with the consultant during early release and full-day PD time to develop the block schedule and was now working to design a model of engaging, student-centered instructional practices and lesson design.
 - a. Members of the team stated that they received five days of training and that they now served as facilitator/leaders for the individual content-based teacher teams that have been meeting during PD time throughout the 2018–2019 year.

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2. District leaders told the team that a similar initiative was underway at the Belmonte Middle School. Because the school was identified by DESE as requiring assistance or intervention in the form of focused/targeted support, Belmonte Middle School's Instructional Leadership Team received support from the Statewide System of Support (SSoS) throughout its turnaround planning process. Staff from SSoS have been working with a task force of teachers and school leaders to develop a comprehensive turnaround plan to redefine and revitalize their entire school community. With the continued support of SSoS staff, and through PD structures and systems including peer collaboration, coaching, and action research, the school is working to develop a system with the capacity to produce continuous and lasting improvement.
 3. Principals said that all elementary teachers met by grade level or specialty area in support of the KTL initiative in all the district's elementary schools, using scheduled PD time, and receiving the direct support and active participation of KTL trainers/coaches. These teams work to collaboratively develop instructional units, strategies, and processes, and to effectively incorporate KTL writing methodologies within the elementary curriculum.
 4. The review team was told that the district has also extended PD support directly to all principals. For the past three school years, a consultant has provided principals with group trainings and individualized coaching specifically designed to expand and improve the quality of their supervisory practices and evaluative skills. In 2018–2019, as a result of SSoS involvement, additional support is available and being provided to middle-school leaders to expand their leadership capacity and enhance their professional competencies.
 - a. Principals expressed the view that this support enabled them to supervise teaching and evaluate teachers with increasing confidence and effectiveness.
- B.** Some ad-hoc leadership teams have begun to provide school leaders and teachers with opportunities to develop professionally.
1. For example, during the 2017–2018 school year the principals of the middle and high schools formed a team of teachers known as the long block team. This team met regularly to research program designs and block schedules for the new middle school/high school. With the support of an external consultant, this team proved its value to district and school leaders, who cited its successful work. This team is now at work planning for the future of the middle school/high school.
 2. In a similar development, on their own initiative, the elementary school principals have recently begun meeting regularly as a group, creating an impromptu professional learning community that appears to function somewhat independently of the district office. The principals focus on core concerns about improvement in their schools and share successes and challenges.

Impact: Recognizing that its needs are many and its resources limited, the district has determined to access and target its coaching, training, and professional learning resources in a manner that will most directly affect student learning. By focusing professional and leadership development training on leaders and teams who have responsibility for key roles in improvement, by seeking to root new practices in schools, and by maintaining a sustained and clear focus on its prioritized needs, the district is increasing the likelihood of improving educational opportunities and academic outcomes for all students.

Challenges and Areas for Growth

2. **The district's educator evaluation system does ensure that educators receive high-quality feedback⁵ that helps them to improve their practice.**
 - A. The team reviewed the evaluations of 32 randomly selected teachers from across the district in TeachPoint, the district's educator evaluation management system.
 1. In general, all required evaluative documents were completed in a timely manner, including goals, self-assessments, records of evidence, and formative assessments/evaluations and summative evaluations. However, almost all of the teacher formative assessments/evaluations and summative evaluations reviewed by the team were not of high quality. They were insufficiently informative and instructive⁶ and did not provide guidance to help educators expand professional competencies and improve classroom practices.
 - a. Only 17 of the 32 teacher evaluations spanning 2018–2019 could be described as being evidence based. The remaining 15 evaluations contained little evidence that was concrete or lesson specific. Instead, feedback was typically generic, vague, and/or a paraphrased restatement of the language of the department's performance indicators themselves: "Evidence and observations show continued progress toward this goal." "[The teacher] uses a variety of instructional strategies and resources to meet the needs of all learners."
 - b. Only 10 of the 32 reviewed evaluations were instructive. Most provided little concrete feedback, clear pedagogical suggestions, or specific and actionable recommendations for improved classroom practice or enhanced lesson design. When feedback was included it was often superficial, overly generalized, or congratulatory: "I have observed

⁵ High-quality feedback is specific, timely, and actionable.

⁶ An informative evaluation is factual and cites instructional details such as methodology, pedagogy, Standards and Indicators of Effective Teaching Practice or instruction of subject-based knowledge that is aligned with the state curriculum frameworks. It does not commit to improvement strategies. An instructive evaluation includes comments intended to improve instruction.

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great progress in this goal.” “This will be addressed in the summative evaluation. There are no concerns at this time.” “They have been lucky to have her as a teacher.”

2. The team also reviewed the 2017–2018 evaluative documentation of the superintendent and the six principals. A review of principals’ evaluation files showed the absence of four of the five required program components: SMART goals,⁷ self-assessments, evidence documentation, and formative assessments. Instead, principals received only an annual summative evaluation.
 - a. The feedback provided to principals in their summative evaluations was rarely specific, concrete, or actionable. Rather than offering ideas, suggestions, and guidance on how to improve, the feedback consisted of general encouragement to persevere.
- B.** The district’s current supervisory practices do not appear to be adequate to properly inform and fully support a high-quality, effective educator evaluation system.
1. Although some teachers reported that their principals visited their classrooms regularly and provided them with helpful and timely feedback, many teachers stated that their principals seldom visited their classrooms and offered little useful feedback when they did. This was confirmed by the review team’s analysis of the announced and unannounced classroom observation documents in the district’s TeachPoint system.
 2. Principals stated that because of the added demands caused by the absence of key curriculum leadership positions and of essential infrastructure and supports, they found it “nearly impossible” to be fully effective. Consequently, principals described themselves as “managers, not instructional leaders,” who struggled to find the time required to supervise and evaluate their teachers effectively.
 3. While the superintendent reported that he had high expectations for central office leaders and principals and was demanding, his evaluative feedback was missing specific guidance to help them improve their practice.
- C.** As of the 2015–2016 school year, state educator evaluation regulations (603 CMR 35.07) call for districts to collect and use student feedback as an evidence source in the teacher evaluation process and staff feedback as evidence in the administrator evaluation process. This feedback may also be used to inform an educator’s self-assessment, goal setting, or as evidence to demonstrate growth over time.

⁷ SMART goals are specific and strategic; measureable; action-oriented; rigorous, realistic, and results- focused; and timed and tracked.

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1. Principals said that the district has not initiated any action or developed any plan to collect and use student and staff feedback in the educator evaluation process.⁸
- D. The team did not find evidence of the use of educators' impact on student learning in the educator evaluation process, which is also a state requirement.⁹
 1. District leaders and principals reported that the district has not developed or initiated any of the action steps required to implement this requirement.

Impact: Without high-quality (specific, timely, and actionable) feedback designed to promote the professional growth of teachers and administrators, the district is missing opportunities to help educators build their skills and improve students' learning experiences and outcomes.

3. **The district's professional development program is not informed by student and educator data, aligned with district and educator goals, and focused on student outcomes.**
 - A. District professional development (PD) structures are not consistent with the guiding principles of state standards for professional development.
 1. Teachers and a district leader reported that the district did not have a formal PD committee or designated leadership group. They stated that the executive director of curriculum, instruction, and accountability planned and directed all district PD programs and activities in collaboration with the principals.
 2. In multiple interviews, teachers described the district's PD programming as top down, allowing no meaningful teacher voice or role in its planning or design. They reported that almost all PD programs were districtwide in scope and without appropriate differentiation by school, grade, content, teacher need, and career stage.
 - B. The state's standards for professional development also require that PD should be an intentional, deliberate, carefully planned process with well-defined, measurable goals that are directly aligned with priorities articulated in the district's strategic plan.
 1. District leaders reported that formal comprehensive PD plan had not been developed and that the district and the schools did not have specific written PD goals or objectives. District leaders stated a desire to construct such a plan for the 2019–2020 school year.

⁹ On Tuesday, February 28, 2017, after collecting public comment since November 2016, the Board of Elementary and Secondary Education voted 9-1 to amend the educator evaluation regulations. The most significant change in the regulations is the elimination of a separate student impact rating. Under the amended regulations, evaluators do not have to make a separate judgment about an educator's impact on student learning. Instead, student learning is embedded as an indicator within one of the Massachusetts Educator Evaluation Framework's four standards.

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- a. At the time of the onsite in March 2019, the district was missing a comprehensive and measurable District Improvement Plan (DIP) by which to properly guide the professional efforts of teachers and administrators.
2. Teachers told the review team that PD programming often appeared to have been minimally planned, that program agendas were typically generated "the day before," and that the quality and relevance of PD activities were inconsistent.
- C. The PD standards also require the collection, analysis, and use of multiple sources of student and educator data including assessment results, demographic data, surveys, and observations to directly inform PD programming decisions and the ongoing evaluation of programs in order to make subsequent improvements. The district does not have many of these tools as well.
 1. The district's systems for data collection and analysis are not fully developed or highly effective. In its self-assessment submitted in advance of the onsite, district leaders rated the district's present capacity to use data systematically to improve teaching, learning, and decision making as an "emerging practice." (See the Assessment Challenge findings above.)
 2. The district has begun to collect educator data, by distributing an interest inventory in the spring and Google feedback assessments for most PD programs and activities. Teachers reported, however, that they were unaware of whether or how whether such data were used to inform decisions about the quality and value of PD programming.

Impact: The absence of a clear PD plan aligned with student and educator data and district and educator goals makes it difficult for the district to provide appropriately targeted and differentiated PD at all stages of their careers that improves their knowledge, skills, and ability to meet the learning needs of all students.

Recommendations

1. **The district should fully implement all components of the educator evaluation system, with a particular emphasis on ensuring that all educators receive high-quality feedback.**
 - A. The district should support and monitor the skills and practices of evaluators to ensure that they regularly provide all staff with high-quality instructional feedback that is specific, timely, and actionable and that promotes professional growth and effectiveness.
 1. The district should continue to provide formal and ongoing training, coaching, and calibration activities for all evaluators to enhance quality and accuracy and reflect fairness and consistency in the evaluation process and documentation.

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2. The superintendent should thoroughly complete all administrators' evaluations in a timely manner in an effort to model effective written feedback for administrators and to meet the requirements of the Massachusetts Educator Evaluation Framework.
 - B. The district should develop and implement processes for collecting and using student feedback in the teacher evaluation process and staff feedback in the administrator evaluation process.
 - C. As part of the educator evaluation system, the district should develop and implement processes for educators and others, including their evaluators, to work together to establish anticipated student learning gains prior to administering common and classroom assessments and compare student results on those assessments to anticipated gains.

Benefits: By improving the quality and consistency of supervisory practices and evaluative documents, the district will create a more effective mechanism for improving the quality of classroom instruction resulting in enriched learning experiences and increased academic outcomes for all students. Improving the evaluations of principals will expand their capacity and the overall effectiveness of the district's educational leaders and improve the quality of teaching and learning in each school.

The collection and use of student feedback as an evidence source in the teacher evaluation process and of staff feedback as evidence in the administrator evaluation process will enable teachers and principals to reflect more accurately and comprehensively on their professional efficacy and to identify areas of strength and for growth. Ultimately, this will result in improved academic opportunities, outcomes, and performance for students.

Recommended resources:

- *A Protocol for developing S.M.A.R.T Goal Statements* (<http://www.doe.mass.edu/eeval/resources/>) is designed to support educators in developing S.M.A.R.T. goal statements using the appropriate evaluation rubric and a DESE-developed protocol. *The Evidence Collection Toolkit* (<http://www.doe.mass.edu/eeval/resources/>) is designed to help districts establish clear and consistent expectations for evidence collection and promote a meaningful process for the collection, analysis, and sharing of high-quality artifacts. The toolkit includes: brief guidance, examples of district strategies, a worksheet for district decision-making, and a handout of Evidence Collection Tips for Educators.
- *On Track with Evaluator Capacity* (<http://www.doe.mass.edu/eeval/resources/pln/OnTrack-EvaluatorCapacity.pdf>) is an interactive document that provides specific strategies, lessons learned, and links to district-created resources. It was produced by eight districts that were part of a Professional Learning Network for Supporting Evaluator Capacity.
- *Quick Reference Guide: Opportunities to Streamline the Evaluation Process* (<http://www.doe.mass.edu/eeval/resources/QRG-Streamline.pdf>) is designed to help districts reflect on and continuously improve their evaluation systems:
 - What's working? What are the bright spots?

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- How can we streamline the process to stay focused on professional growth and development?
 - What do we need to adjust to ensure our system is valuable to educators and students?
 - DESE's Educator Evaluation Training Workshops (<http://www.doe.mass.edu/eeval/training/teachers/default.html>) provide a general overview to the educator evaluation framework as well as opportunities to engage in activities associated with the first three steps of the 5-Step Cycle. This is a particularly helpful resource for educators new to the educator evaluation framework.
 - DESE's calibration platform (<http://www.ma-calibration.com/>) includes tasks and activities to help educators calibrate their understanding of both content and pedagogy.
 - DESE's Evaluator Calibration Training resources (<http://www.doe.mass.edu/eeval/resources/calibration/>) include tools, protocols, and videos to support evaluator calibration around perceptions of practice aligned to ESE's model rubrics as well as high quality feedback.
 - *Quick Reference Guide: Student and Staff Feedback* (<http://www.doe.mass.edu/eeval/resources/QRG-Feedback.pdf>) provides information about how to select feedback instruments and use feedback as part of the educator evaluation system, along with links to relevant resources.
- 2. The district should build a professional development program that is informed by data and includes well-defined, measurable goals that are aligned with district, school, and educator goals.**
- A.** The district's professional development (PD) plan should describe a set of learning experiences that is varied, systematic, informed by student and educator data, with specific, measurable goals aligned with district, school, and educator goals.
1. The district should develop a coordinated PD plan and design, implement, and evaluate the effectiveness of district PD programs and supports.
 2. The district should provide formal opportunities for teachers to participate in the design, implementation, and assessment of PD.
 3. PD programming should be sufficiently differentiated to accommodate the individual learning needs and the experience and expertise of teachers, including grade-level, content, and career stage.
 4. All PD programs and activities at both the district and school levels should be regularly evaluated by staff. The PD team should use the results of those evaluations, as well as a careful analysis of student performance and other data, to make needed and timely improvements to future PD programming.

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Benefits: The development of a carefully planned, robust, data-informed, differentiated PD program will help to strengthen educators' skills, ultimately benefiting student performance and outcomes. Involving staff directly in the design, implementation, and assessment of PD programming will increase their sense of ownership and enhance their support for and active participation in district and school improvement efforts, as well as their own professional growth.

Recommended resources:

- *The Massachusetts Standards for Professional Development* (<http://www.doe.mass.edu/pd/standards.html>) describe, identify, and characterize what high quality learning experiences should look like for educators.
- DESE's *Professional Development Self-Assessment Guidebook* (<http://www.mass.gov/edu/docs/ese/accountability/dsac/professional-development-self-assessment-guide.pdf>) provides tools for analyzing professional development offerings' alignment with the Massachusetts Standards for Professional Development, the Educator Evaluation Framework, and the Standards and Indicators of Effective Practice.
- *Identifying Meaningful Professional Development* (<https://youtu.be/zhuFioO8GbQ>) is a video in which educators from three Massachusetts districts discuss the importance of targeted, meaningful professional development and the ways districts can use the evaluation process to identify the most effective PD supports for all educators.
- DESE's Information for Professional Development Providers web page (<http://www.doe.mass.edu/pd/providers.html>) provides links to professional development course parameters and a self-assessment.
- Professional development case studies (<http://www.doe.mass.edu/pd/CaseStudies/>) highlight districts implementing meaningful professional development programs that support educators throughout the entire career continuum. They include examples of PD programs that are job-embedded, teacher-led, data-driven, and aligned to educator and district needs.

Student Support

Contextual Background

At the time of the onsite in March 2019, the district was involved in a comprehensive facilities renewal project. While it is impossible to predict its impact with certainty, new grade and school configurations will change the nature and role of every school. All school buildings will become handicap accessible and IDEA compliant¹⁰, and the district will end its current practice of concentrating the population of elementary-level students with disabilities in one of four elementary schools.

The district struggles to address the needs of students systemically, even as the enrollment of economically disadvantaged students, students with disabilities, and English learners (ELs) increases.¹¹ The district has some inclusion teams in place; however, these teams have not been trained in a co-teaching model, which would engage general education and special education teachers in shared planning, organization, delivery, and assessment of instruction.

The review team found little evidence that limited- or non-English speaking families received general school information in their home language; the one exception was contracted translation services for the families of students receiving or being evaluated for special education services. The district's website does not offer a translation option for families to choose their home language. Educators reported that all other correspondence was sent home in English only.

The high-school student handbook includes information about the building crisis response team plan, which includes specific lock-in, lock-down, and secure-in-place procedures, and intruder notification to all staff computers, as well as to the police. Teachers expressed the desire to have a more current plan. High-school students expressed concerns about their safety in school because of easy access to the building, even though locks have recently been added to exit/entrance doors. The district is considering providing training that could address these concerns.

¹⁰ IDEA stands for the Individuals with Disabilities Act. The priorities of IDEA are to:

1. Ensure that all children with disabilities have available to them a free and appropriate public education that emphasizes special education and related services designed to meet their unique needs and prepare them for further education, employment, and independent living;
2. Ensure that the rights of children with disabilities and their parents are protected;
3. Assist states, localities, educational service agencies, and Federal agencies to provide for the education of all children with disabilities;
4. Assess and ensure the effectiveness of efforts to education children with disabilities.

¹¹ Between 2016 and 2018, the percentage of economically disadvantaged students increased, from 25.1 percent in 2016 to 26.5 percent in 2017 to 28.6 percent in 2018. During the same interval, the percentage of students with disabilities increased from 15.3 percent in 2016 to 15.8 percent in 2017 to 16.9 percent in 2018. Between 2016 and 2018, the percentage of ELs fluctuated with an overall increase from 4.7 percent in 2016 to 4.0 percent in 2017 to 5.8 percent in 2018.

Strength Finding

1. The district has increased support for students at risk of not graduating by hiring two wraparound counselors and establishing credit recovery options.

- A.** The district has hired two wraparound counselors to address attendance issues; meet with hospitalized students; attend re-entry meetings; conduct support groups, such as a group for grandparents raising their grandchildren; and assist families in accessing community resources based on their individual needs.
1. Wraparound counselors meet with the superintendent monthly to prioritize the needs of the individual students and families that they support.
 2. Wraparound counselors have been trained to develop 504 accommodation plans that provide appropriate support to increase the academic achievement of students with diagnosed disabilities.
 3. School counselors and district leaders described the wraparound counselors as beneficial and expressed the view that the addition of these positions was something the district has done very well.
- B.** Administrators and counselors reported that the district has implemented online support programs, including credit recovery opportunities to help students increase their academic achievement and graduate on time.
1. GradPoint Credit Recovery Program is an online, self-paced, comprehensive, standards-based learning opportunity. It enables students who are credit deficient to retake courses to earn academic credit.
 2. Online Edgenuity courses are offered on Saturday mornings for credit recovery and to prevent students from dropping out of school. Saugus teachers support the students in these courses.
 3. An administrator described an after-school Title I-funded program at the middle school, entitled Club Overtime, which incorporates active games with academic support. Staff plan to collect data on participation and intended outcomes, including improvement in students' grades and a decrease in behavioral referrals.
 4. The district uses Khan Academy to support academic needs and to encourage students to prepare for PSAT and SAT tests.

Impact: When the district provides concrete help to struggling students who are facing health, mental health, housing, and other challenges, it increases the likelihood that these students and their families will overcome the non-academic barriers to learning that are interfering with school life, enabling them to engage more fully in their learning efforts. By recognizing the needs of students who are at risk of not

graduating and providing them with targeted social and academic supports outside of the school day, the district is greatly increasing students' prospects for academic success and graduation.

Challenges and Areas for Growth

2. **The district does not have a proactive tiered system of targeted academic and other support to meet the needs of all students, based on data-driven decision-making and progress monitoring.**
 - A. Administrators reported that the district did not have a uniform tiered system of support for all students.
 1. The draft District Plan Overview 2018–2021 includes PD for teachers in Universal Design for Learning (UDL) as part of a strategic initiative to increase teachers' ability to facilitate student-centered lessons that meet students' individual learning styles. Although some teachers at the middle school read and discussed chapters from a UDL text this school year in a book club, they reported that follow-up and implementation strategies were missing.
 - a. The district does not have an updated District Curriculum Accommodation Plan (DCAP) that describes the services and supports that it provides to ensure that all possible efforts are being made to meet students' needs in general education classes and to accommodate a wide range of student learning styles and needs.
 - B. The review team did not find evidence of instruction that met students' diverse learning needs.
 1. Although the review team found sufficient and compelling evidence that teachers were using a variety of instructional strategies in 71 percent of observed elementary classes, the proportion in middle- and high-school classes was 29 percent and 20 percent, respectively.
 2. The review team found sufficient and compelling evidence of the engagement of students in challenging tasks, regardless of learning needs in only 30 percent of observed elementary school classes, in 6 percent of observed middle-school classes, and in 10 percent of observed high-school classes.
 - C. Some students with disabilities may not be receiving adequate supports in the general education program.
 1. In 2018, 43 percent of Saugus students with disabilities scored in the needs improvement (NI) and failing (F) categories on the Grade 10 English Language Arts MCAS test, compared with 31 percent of students with disabilities statewide. In addition, 73 percent of Saugus students with disabilities scored in the NI and F categories in Mathematics, compared with 60 percent of students with disabilities statewide.

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2. Several parents reported that mandated services were either not being provided, or were provided in an untimely manner to their children. Teachers reported that some IEPs were not being fully implemented. Students stated that 504 plans were not always followed by classroom teachers, creating problems that must be resolved by guidance staff.
 - a. In response to some of these concerns, the superintendent identified the need to establish a special education transition program.
3. High-school teachers told the team that students with disabilities were often taught by paraprofessionals, rather than teachers.
4. Teachers said that general education and special education teachers had not been trained to function as co-teachers.
5. An administrator reported the need for both PD and a special education policy and procedure manual.
6. Inclusion teams have not received targeted PD and common planning time has not been uniformly scheduled and used to plan a range of teaching strategies to engage all students.

Impact: Without a clearly defined, tiered system of support that includes data-driven decision-making, progress monitoring, and evidence-based supports in conjunction with a variety of instructional strategies, educators likely are unable to respond rapidly and with impact to the emergent needs of students. Without such a system, the district likely struggles and falls short of its aspiration to improve all students' performance, opportunities, and outcomes.

3. **The district has not established a positive behavioral system with an ongoing data-monitoring process to evaluate progress.**
 - A. Counselors reported that positive behavioral interventions and supports were not in place throughout the district.
 - B. In the district's self-assessment submitted in advance of the onsite, district leaders reported that they have not implemented districtwide positive behavioral systems and expectations that are taught, modeled, and rewarded and that ensure policies and practices are inclusive and equitable and are evaluated for progress to inform practices.
 - C. Parents told the team that discipline was inconsistent and cyberbullying was not adequately addressed. Students, counselors, and elementary teachers identified an absence of police collaboration and access to a full-time resource officer as areas of concern, especially when issues of cyberbullying arose. Middle-school teachers reported that discipline was inconsistent and there was an absence of a shared philosophy about student behavior. They described the hallways as "bully zones" and expressed the view that students would feel better with clearer expectations. Middle- and high-school teachers described the discipline in both schools as missing consistency in policies, practices, and consequences.

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- D. While the team found sufficient and compelling evidence of a climate conducive to teaching and learning in 89 percent of the elementary classrooms, the proportions for the middle school and the high school were 59 percent and 55 percent, respectively.
- E. Many students are missing significant instructional time.
1. The percentage of district students suspended in-school and out-of-school has increased over the three years before the onsite and exceeds the statewide averages. According to DESE data, between 2016 and 2018 the district's in-school suspension rate increased by .9 percent, from 4.3 percent in 2016 to 5.2 percent in 2018. During the same interval, the statewide in-school suspension rate increased by .1 percent from 1.8 percent in 2016 to 1.9 percent in 2018. The district's out-of-school suspension rate increased by 1.3 percent, from 1.7 percent in 2016 to 3.0 percent in 2018. Between 2016 and 2018, the statewide rate remained at 2.9 percent.
 - a. The middle school's out-of-school suspension rate is well above the high school out-of-school suspension rate and increasing. Between 2016 and 2018, the middle school's out-of-school suspension rate increased by 6.0 percent, from 2.5 percent in 2016 to 8.2 percent in 2018. During the same interval, the high school's out-of-school suspension rate decreased by .9 percent, from 3.6 percent in 2016 to 2.5 percent in 2018.
 2. Between 2016 and 2018, the percentage of district students absent for 10 or more days each year increased by 3.5 percent, from 40.4 percent in 2016 to 43.1 percent in 2017 to 43.9 percent in 2018. During the same interval, the statewide average increased by 13.6 percent, from 30.5 percent in 2016 to 33.3 percent in 2017 to 34.1 percent in 2018.
 3. The percentage of district students who are chronically absent increased by 4.1 percent, from 16.3 percent in 2016 to 18.3 percent in 2017 to 18.6 percent in 2018, and exceeds the statewide average. Between 2016 and 2018, the statewide average increased by .9 percent, from 12.3 percent in 2016 to 13.5 percent in 2017 to 13.2 percent in 2018.
 - a. The 2018 chronic absence rates are high for grades 7–12.
 - i. In 2018, the grade levels in the district with the highest chronic absence rates were as follows: 19.9 percent for grade 7; 17.4 percent for grade 8; 23.5 percent for grade 9; 25.5 percent for grade 10; 40.2 percent for grade 11; and 39 percent in grade 12.
 - b. The chronic absence rates for some student groups are high.
 - i. In 2018, the student groups in the district with the highest chronic absence rates were as follows: 31.1 percent for English learners, 29.5 percent for economically disadvantaged students, and 21 percent for students with disabilities.

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- G. Although the district provides credit recovery opportunities to students who are at risk of dropping out, according to DESE data, between 2016 and 2018 the district's annual dropout rate increased by .3 percent, from 2.8 percent in 2016 to 3.1 percent in 2018, and exceeds the statewide average. During the same interval, the statewide average remained at 1.9 percent.

Impact: Without positive behavioral interventions and supports in place and without a positive, supportive school climate, the district has a limited ability to create safe and effective learning environments that are conducive to quality teaching and learning.

Recommendations

1. The district should develop and implement a formal tiered system of support.

- A. Using a process of its own design that includes a range of stakeholders, the district should develop a coordinated districtwide tiered approach to supporting students.
1. In Tier 1, the district should provide students with core instruction using a variety of instructional strategies that is robust and responsive and that provides universal behavioral supports.
 2. In Tier 2, educators should identify students, based on universal screening and progress monitoring, to receive instruction through supplemental interventions in addition to the core instruction.
 3. In Tier 3, educators should monitor and support students with high levels of frequency, providing more intense interventions in addition to core instruction.
- B. The district should provide high-quality PD for all staff to facilitate the development and implementation of a formal tiered system of support that includes providing for individual differences in the general education program and progress monitoring. The district should also provide PD for co-teaching teams on effective practices in the inclusive classroom.
- C. The district should develop a renewed DCAP and provide teachers with PD on the accommodations and instructional strategies elaborated in it.
- D. The district should ensure that school leadership teams systematically evaluate the effectiveness of its tiered system of support using data to inform planning and adjustments to practice.

Benefits: A data-driven tiered system of supports will ensure that all students receive high-quality core instruction, using a variety of instructional strategies and targeted interventions. As a result, the district will be better able to improve all students' performance, opportunities, and outcomes.

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Recommended resources:

- The *Early Warning Implementation Guide* (<http://www.doe.mass.edu/ccr/ewi/>) provides information on how to use early warning data, including the Massachusetts Early Warning Indicator System (EWIS), to identify, diagnose, support and monitor students in grades 1–12. It offers educators an overview of EWIS and how to effectively use these data in conjunction with local data by following a six-step implementation cycle.
- The *Massachusetts Systems for Student Success (SfSS)* (<http://www.doe.mass.edu/sfss/>) 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. The SfSS website includes links to a self-assessment and a variety of helpful resources.
- The *Educator Effectiveness Guidebook for Inclusive Practice* (<http://www.doe.mass.edu/edeval/guidebook/>) includes tools for districts, schools, and educators that are aligned to the MA Educator Evaluation Framework and promote evidence-based best practices for inclusion following the principles of Universal Design for Learning, Positive Behavior Interventions and Supports, and Social and Emotional Learning.
- *Making the Case for the Importance of School Climate and Its Measurement* (<http://safesupportivelearning.ed.gov/events/webinar/making-case-importance-school-climate-and-its-measurement>) is a recorded webinar, along with a detailed PowerPoint presentation, that addresses: the linkages between school climate and students' development; models of school climate; best practices in communicating the importance of school climate to stakeholders; and characteristics of good school climate measures.
- *Every Student, Every Day: A Community Toolkit to Address and Eliminate Chronic Absenteeism* (<http://www2.ed.gov/about/inits/ed/chronicabsenteeism/toolkit.pdf>) is a set of Action Guides that provide information and resources to help ensure that all young people are in school every day and benefitting from coordinated systems of support.
- *Guiding Principles: A Resource Guide for Improving School Climate and Discipline* (<http://www2.ed.gov/policy/gen/guid/school-discipline/guiding-principles.pdf>) highlights ways in which states and school districts can promote academic excellence by creating safe and productive learning environments for all students.
- *Family, School, and Community Partnership Fundamentals* (<http://www.doe.mass.edu/bese/councils/>) provide a framework for family engagement, along with a self-assessment tool.

2. The district should adopt a multi-tiered positive behavioral intervention and support system and provide professional development to help district and school leaders, teachers, and support staff to implement it across the district.

- A. The district should develop positively stated expectations for students. These expectations should be taught to students, posted throughout the district, and regularly reviewed.
1. The district should provide PD for teachers to help them build up their capacity to identify, understand, and respond to the underlying causes of student behavior.
 2. The district should use an ongoing data monitoring system to evaluate progress and inform practices. Specific rules, behaviors, and expectations should be taught, modeled, and rewarded as part of a schoolwide positive behavioral system.
 3. The district should ensure that behavior management, discipline policies, practices and procedures are inclusive, developmentally appropriate, unbiased, equitable, supportive, and aligned with the needs of all students.

Benefits: By adopting and implementing a system of positive behavioral interventions and supports, the district will create an environment that helps students develop social-emotional and academic knowledge, skills, and competencies. An effectively implemented positive behavioral system has the potential to contribute to safe, positive, healthy, inclusive, engaging, and welcoming learning environments that cultivate supportive relationships and a strong sense of belonging.

Recommended resources:

- DESE's *Bullying Prevention and Intervention* page (<http://www.doe.mass.edu/bullying/>) provides resources to help districts and schools to prevent and address bullying, in support of related legislation signed into law in 2010.
- *Supporting and Responding to Behavior: Evidence-Based Classroom Strategies for Teachers* (<https://www.osepideasthatwork.org/evidencebasedclassroomstrategies/>) summarizes evidence-based, positive, proactive, and responsive classroom behavior intervention and support strategies that can help teachers capitalize on instructional time and decrease disruptions.
- *Addressing the Root Causes of Disparities in School Discipline* (<https://safesupportivelearning.ed.gov/addressing-root-causes-disparities-school-discipline>) is an action planning guide designed to help school and district teams address disparities in school discipline.
- *School Climate Practices for Implementation and Sustainability* (<http://www.schoolclimate.org/publications/documents/SchoolClimatePracticeBriefs-2013.pdf>), from The National School Climate Center, is a set of Practice Briefs focused on improving school climate.

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- *Guiding Principles: A Resource Guide for Improving School Climate and Discipline* (<http://www2.ed.gov/policy/gen/guid/school-discipline/guiding-principles.pdf>) highlights ways in which states and school districts can promote academic excellence by creating safe and productive learning environments for all students.
 - *Safe and Healthy Learning Environments* (<http://www.doe.mass.edu/sfs/safety/>) is a web page outlining a number of ESE programs and related resources that can help school districts and communities build safe and healthy learning environments for all students.
 - The *Behavioral Health and Public Schools Framework* (<http://bhps321.org/viewframework.asp>) is a guidance document to help schools establish supportive environments with collaborative services that will enable all students – including those with behavioral health needs – to achieve at their highest potential.
- 3. The district should strengthen its efforts to improve student attendance and reduce the need to rely on suspension as a response to misconduct.**
- A. The district should analyze attendance data and determine the root cause(s) of chronic absence.**
 1. The district should use disaggregated data to examine attendance rates and analyze the extent to which specific student groups have disproportionate rates of chronic absence.
 2. The district should gather input from students and families through focus groups and surveys about the reasons for high absence rates and possible ways to address the challenge of students missing too much instruction.
 3. The district should ensure that schools support two-way communication and access for all students' families, including providing interpretation and translation services to families, as appropriate.
 4. The district should determine the root causes of high and disproportionate absence rates and take steps to address them, including reviewing current initiatives to improve attendance and adjusting efforts as needed.
 - B. The district should analyze suspension data and determine the root cause(s) of suspension.**
 1. The district should use disaggregated data to examine suspension rates and analyze the extent to which specific student groups are suspended disproportionately.
 2. The district should determine the root causes of high and disproportionate suspension rates and take steps to address them, including reviewing current initiatives to improve suspension and adjusting efforts as needed.
 3. The district should implement positive behavioral interventions, student supports, and strategies including restorative practices and conflict resolution.

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- a. The district should continue to implement the PBIS program to improve student behavior and evaluate whether PBIS is contributing to a reduction in suspensions.
4. The review team strongly recommends that the district take advantage of opportunities to participate in DESE-sponsored professional development on rethinking discipline.
- C. The district should consider that addressing attendance and suspension may involve a range of wider initiatives such as improving instruction and its relevance to post-graduation goals; fostering a positive school climate; and building or strengthening relationships with students and their families.
 1. The district might consider ways to increase students' agency, personalize their learning, and increase their understanding of the connections and relevance of their current coursework to their future success.

Benefits: The primary benefit of implementing this recommendation is that if students are in school, they are more likely to succeed. Engaging students and families in identifying the causes of student absence and suspensions and in suggesting ways to improve attendance and lower suspension likely will help raise attendance, decrease suspensions, and promote students' growth and development.

Recommended resources:

- *Addressing the Root Causes of Disparities in School Discipline* (<https://safesupportivelearning.ed.gov/addressing-root-causes-disparities-school-discipline>) is a guide that describes how to carry out a descriptive analysis of disparities in school discipline and how to conduct a root cause analysis to systematically address school-based factors that contribute to disparities. These analyses should result in an actionable understanding of the following:
 - Who is being disparately disciplined and what is happening to them
 - The systemic causes of disparities in school discipline and why they occur
 - How you can reduce and eliminate disparities in school discipline
- *Resource Guide for Superintendent Action* (<https://www2.ed.gov/policy/gen/guid/school-discipline/rethink-discipline-resource-guide-supt-action.pdf>) is designed to highlight the role that superintendents and school leaders play in developing safe and supportive school climate and discipline; offer possible district- and school-level action steps for initiating and enhancing local efforts to create safe and supportive school climate and discipline systems and practices; and share promising practices and useful resources for implementing and sustaining safe and supportive school climate and discipline in collaboration with local stakeholders.
- *Positive School Discipline* (<http://positiveschooldiscipline.promoteprevent.org/course>) is an interactive, self-paced course for school leaders that includes skill-building activities, real-world examples, and key strategies for creating a positive school climate.

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- *Every Student, Every Day: A Community Toolkit to Address and Eliminate Chronic Absenteeism* (<http://www2.ed.gov/about/inits/ed/chronicabsenteeism/toolkit.pdf>) is a set of Action Guides that provide information and resources to help ensure that all young people are in school every day and benefitting from coordinated systems of support.
- The Attendance Works website (<https://www.attendanceworks.org/resources/>) provides several resources to help address chronic absenteeism, including district- and school-level self-assessments and planning tools, webinars, and toolkits.
- *My Career and Academic Plan (MyCAP)* (<http://www.doe.mass.edu/ccr/initiatives/>) is a student-directed, multi-year planning tool and process that allows students to map academic plans, document personal/social growth, and engage in career development activities consistent with the student's unique, self-identified interests, needs, and goals for the attainment of post-secondary success. (A new MyCAP guidance document will be available in spring 2019 at the website listed above.)

Financial and Asset Management

Contextual Background

Communication and collaboration between the district and the town have improved since the last district review in 2010. Frequent interaction and the adoption of a townwide accounting system have enabled transparency in financial operations and the sharing of knowledge and experience. The town recently hired a consultant who specializes in government accounting to strengthen its systems and processes and to further enhance compatibility among town departments, including the district.

The presence of the executive director of finance and administration who has worked in the district since 2012 and who works collaboratively with town finance officials has contributed to consistency in the management of the district's business office. The executive director oversees a business office that is efficient and follows sound financial practices, as evidenced by the existence of an updated financial policies and procedures manual and the absence of any financial irregularities in annual audits. The executive director of finance and administration meets regularly with the superintendent and is an integral member of the central office administrative team.

It is apparent that the district and the town share a commitment to efficiency. The executive director of finance and administration views finding efficiencies as a priority: she makes frequent reviews of staff and expense budgets and ensures that a limited amount of district funds remains unspent at the end of the fiscal year.

With the use of 6 school buildings, 3 of which are over 50 years old, the district has found that maintaining and operating the older buildings is an inefficient allocation of education resources. The district hopes to find significant savings in building operations and maintenance when grades are reconfigured, enabling the district to locate pre-kindergarten through grade 12 in just 3 buildings, and close the 3 older buildings.

Strength Finding

1. **As part of a comprehensive restructuring of its educational model, the district has secured funding for construction of a new middle/high school building, an addition and renovations for another school, and renovations to one other school building. By 2021, all students will attend a new, renovated, or renovated/expanded school with up-to-date facilities.**
 - A. District leaders and town officials worked together on preparing both a public information effort, and a plan, the January 2017 Saugus Public Schools Educational Plan, to address the educational needs of students, which the present school buildings could not provide.

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1. The district uses 6 school buildings and an administration building that range in age from 18 to 123 years old; while most have had recent renovations, Oaklandvale Elementary School is 57 years old and has not had improvements.
2. Although the current high-school building is sufficient in size for its student population, it is missing full handicap accessibility and essential educational facilities in the areas of science and technology/engineering.

**Table 30: Saugus Public Schools
Years of Construction and Renovation and Ages of Schools**

School	Year Built	Year Renovated	Age of School
Oaklandvale Elementary	1962		57
Waybright Elementary	1965	2010	54
Lynnhurst Elementary	1964	2006	55
Veterans Memorial Elementary	2001	2006	18
Belmonte Middle	1966	2003	53
Saugus High	1954	1971	65
Roby Administration	1896		123

- a. Science labs do not have sufficient lab space and are not handicap accessible. There are deficient electrical outlets and gas jets and the labs do not have proper storage areas for chemicals and equipment. The 2017 Saugus Public Schools Educational Plan cited the condition of the science labs as the primary need and focus of the building project.
- b. Wireless connectivity is an issue in some areas of the current building.
3. Three of the four elementary schools were built between 1962 and 1965. According to the Massachusetts School Building Authority (MSBA), these schools are near or exceeding their student capacity.
 - a. Oaklandvale school capacity is 237 students and has a 2018–2019 enrollment of 240 students.
 - b. Lynnhurst school capacity is 276 students and has a 2018–2019 enrollment of 270 students.
 - c. Waybright school capacity is 237 students and has a 2018–2019 enrollment of 231 students.

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4. The Waybright School is not handicap accessible. In addition, the Oaklandvale and Lynnhurst schools do not have libraries/media centers or computer labs.
- B.** The Saugus submission to the MSBA to fund building construction and improvements required a districtwide master plan, which was developed by a building committee composed of district leaders and municipal officials and other residents.
1. MSBA invited the town and the district into the eligibility period for constructing the new high school in January 2015. This period required preliminary steps that included the formation of a building committee.
 - a. A 25 to 30 member building committee was formed that consisted of the town manager, the superintendent, school committee members, teachers, and other constituents. Its current chair is the chair of the school committee.
- C.** As part of the Master Plan, the Saugus Public Schools Educational Plan details the requirements and benefits that will result from reconfiguring the grade levels offered in a smaller number of new or renovated school buildings.
1. The 51-page 2017 Saugus Public Schools Educational Plan recommends combining the middle and high schools into a new building, closing the three older elementary schools, locating a pre-kindergarten through grade 2 elementary school in the Veterans Memorial Elementary School, and creating a STEAM Academy for grades 3 to 5 at the Belmonte Middle School site. The superintendent anticipated that the middle school/high school would open in the fall of 2020, and the two levels of elementary schools would be ready in 2021.
 - a. The superintendent told the review team that the town and district worked with an outside educational consultant who conducted many communitywide workshops to gather stakeholder input.
- D.** Working with a variety of stakeholders, district leaders and town officials secured overwhelming voter support for a debt exclusion to fund the new projects.
1. In June 2017, two debt exclusion articles were approved by Saugus voters by margins exceeding 70 percent.
 - a. The first debt exclusion article asked for voter approval to fund the town's portion of the new middle/high school construction. MSBA is paying for 57.7 percent of the project's \$160,720,000 cost with the town paying the remaining \$68,000,000.
 - b. The second debt exclusion vote was for the consolidation of four elementary schools to two. This move will cost the town approximately \$25 million for an addition to one school and renovations to both. MSBA funding was not available because the preschool

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and administrative offices were located in these buildings. With this vote, the town has committed to pay for the entire addition and renovations.

2. District leaders and town officials said that they and their many civic allies were able to secure the strong support of the Saugus voters through an extensive outreach effort to parents, local businesses and organizations, senior citizens and churches, among other groups.

Impact: Through a cooperative and comprehensive approach, district leaders and town officials have advocated for and made possible the reconfiguration of grade levels in newer, well-equipped, and adequately sized school buildings that can support educators in their effort to provide a 21st century education for all students.

Challenges and Areas for Growth

2. **Many principals, teachers, and students expressed concern and frustration with the history of allocation of financial resources, which they stated has led to an inadequate deployment of staff, both at the leadership level and in key school-based roles, and insufficient provision of learning materials, textbooks, and supplies.**
 - A. The district's net school spending (NSS) has consistently exceeded the required level over at least the last 10 years, by margins that range from 17.3 percent in fiscal year 2010 to 49.3 percent in 2018.
 1. An area of spending that is of concern among district administrators and town officials is the amount spent on benefits and fixed costs. In this category of spending Saugus ranks highest among 10 similar districts,¹² with a per-pupil in-district cost of \$3,968 in 2017. The next highest level of spending in the category is \$3,494.
 - a. When asked what accounted for a higher level of per-pupil spending than the other districts in the comparison group, a district leader cited health insurance and retirement benefits. According to DESE data, retirement costs increased by 52 percent between 2016 and 2018 and insurance for active and retired employees increased by 38 percent during that period. The health insurance split between employer and employee is currently 90 percent/10 percent. The district's strategy to deal with these costs is to limit the addition of full-time equivalent hires who would be eligible for insurance benefits.
 - b. One interviewee described health insurance expenses as a "budget buster."

¹² The comparison districts are Agawam, Falmouth, Hudson, Ludlow, Monomoy Regional, Northbridge, Rockland, South Hadley, Stoughton, and Winthrop.

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- B. Many stakeholders told review team members that the district did not have enough administrative and instructional personnel to meet the needs of staff and students or enough educational resources and materials for effective instruction.**
1. Of particular concern among principals and teachers is the absence of curriculum leaders at the district and school level. Saugus has a districtwide executive director of curriculum, instruction, and accountability who serves as the only designated curriculum leader in the district. According to DESE data, from 2014 to 2018, the number of district and school leaders declined from 21 FTEs to 16 FTEs, a decrease of 23.8 percent. Between 2014 and 2018, the student population decreased only 7.6 percent, from 2,803 in 2014 to 2,588 in 2018.
 - a. Principals and teachers stated that curriculum leaders at both the elementary and secondary level were needed in all subjects.
 - i. In fiscal year 2019, stipends are being paid to a few elementary teachers through a grant to develop curriculum.
 2. A district administrator and teachers said the district did not have instructional coaches, department heads, and content specialists.
 3. Interviewees also expressed their concern that there were not enough adjustment counselors or a full-time resource officer for the district.
 - a. Although some interviewees expressed the view that more adjustment counselors were needed, the superintendent told review team members that the district recently hired two districtwide wrap-around counselors who can provide the services offered by adjustment counselors and strengthen connections to families and the community.
 - b. The district occasionally has a Saugus police officer who visits the high school, but he is a detective and not a dedicated resource officer.
 4. Many teachers and leaders shared their difficulty in finding someone they could go to when they needed support or help with a problem or initiative. When describing their deliberations about whether or not to consult with a leader, interviewees made comments such as “not wanting to bother them” or feeling “reluctant to add to their responsibilities.”
 5. At the same time, leaders expressed frustration that they did not have time to offer support to those who need it. They reported there were no “middle layers” in school leadership, observing that they had to “change hats” all day to cover all of their extended responsibilities. One principal described the position as an island with “almost too much” authority.
- C. Some students and teachers do not have current textbooks, or do not have access to classroom materials that are available in sufficient quantities.**

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1. Teachers and students said they were using outdated textbooks, some of which were falling apart. Other teachers said they had no textbooks at all.
 2. Teachers sometimes find it necessary to purchase their own classroom materials or ask parents to contribute materials.
 3. When asked where the district could be allocating more resources, one leader said curriculum resources.
- D. District leaders stated that they believed that the necessary personnel were currently in place, or would be added in fiscal year 2020 to provide essential services. They also stated that they believed there were sufficient school-level budgets for textbooks and materials.
1. As examples of meeting staff needs, the superintendent pointed to recent staff positions such as the two wrap-around counselors that have been hired in fiscal year 2019, a new Board Certified Behavior Analyst position, an additional .5 ELL teacher, and a full-time adjustment counselor that have been proposed for fiscal year 2020.
 2. The superintendent and district leaders stated that principals did not fully embrace their budget authority and that with some additional professional development, they could become more adept at purchasing needed curriculum and supplies within current budget levels.

Impact: Whether accurate or not, the widespread perception that the allocation of resources is inadequate and ineffective may be creating the impression that the district is not fully supporting the needs of staff and students. The current allocation of resources may not be sufficient to improve students' performance, opportunities, and outcomes.

3. **The district's budget documents for fiscal year 2019 and fiscal year 2020 do not include key information that connects improvement planning and student performance to the allocation of resources, nor do they include all available resources, such as grants and revolving accounts. In addition, the district and the town do not have an up-to-date and signed written agreement on municipal expenditures in support of the district.**
- A. Although the fiscal year 2019 and fiscal year 2020 budget documents include some important financial data, neither document includes student performance data, the goals and priorities of the district to improve performance, and detail on all sources of funds that can be used to meet goals.
1. The fiscal year 2019 budget document contains a one-page letter from the superintendent, followed by 16 pages of comparisons between Saugus Public Schools and various other districts with similar student group demographics, expenditures per pupil, attendance and dropout rates, and other data categories.

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- a. One page of the comparison section contains data comparing the percentages of Saugus students scoring *Proficient* or higher on the 2016 MCAS tests in ELA and mathematics with the percentages for 12 other communities. This is the only student performance data in the budget book.
 - b. The comparisons section of the budget document is followed by several pages of explanations of circuit breaker funds, out-of-district school placements, and a guide to how per-pupil spending is calculated.
 - c. The final section of the budget document is a line item budget with two years of actual expenses for fiscal year 2016 and fiscal year 2017, budget numbers for fiscal year 2018, and staff FTEs for those years.
 - d. When asked why he chose this approach, the superintendent stated that the focus was on framing the issues facing the district, helping local leaders and residents understand who Saugus's actual peer districts were, and partially telling the story of why Saugus was not performing at the desired level.
2. The fiscal year 2020 budget document is similar to fiscal year 2019 in composition, but in the fiscal year 2020 budget document the superintendent focuses his message on the methodology used to construct the budget. There is discussion of the differences between incremental budgeting and zero-based budgeting and how the district decided to use a hybrid model combining both methods. The fiscal year 2020 budget document begins with a one-and-a-half-page letter from the superintendent and includes a one-page budget timeline schedule.
- a. The methodology section is followed by the same line item budget format as that used in fiscal year 2019.
 - b. There is no discussion of student data, or goals and priorities to improve student performance.
 - c. The fiscal year 2020 budget document does not include all sources of funds.
 - d. When asked in an interview why he compiled the fiscal year 2020 budget document in this way, the superintendent said that he wanted to answer the questions of the town's finance committee and demonstrate that the district was practicing realistic budgeting.
 - e. Another district leader answered a similar question by saying that the district wanted to show town officials that what was contained in the district's budget lines was supported by a thorough review of actual expenses.
- a. Town officials confirmed that, in the past, there had been a level of mistrust between the school district and town on spending and financial processes, but that the relationship has improved.

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- B. A district leader said that special revenue was reported regularly to the school committee through budget versus actual spending reports. Consequently, this leader did not include this information in the budget proposal and budget document.
- C. The district and the town do not have a current and signed written agreement on municipal expenditures in support of the schools.
 - 1. The district and the town do not have an up-to-date, written agreement on a method for determining the cost of municipal services that are provided to the district by the town, as required by state regulation CMR 10.05.
 - a. District leaders and town officials reported that it has been many years since there has been an agreement. However, a town official said town officials were drafting the agreement and would meet with district leaders to discuss it.
 - 2. This document did not exist at the time of the last district review in 2010, at which time the district and town were urged to reach agreement through improved communication.

Impact: A budget document that is only marginally connected to district and school goals, and with limited student performance data, does not give stakeholders a clear picture of how resources are allocated to support the district's priorities. Without a current and signed written agreement on a methodology for calculating the cost of municipal services that are provided to the district by the town, the district cannot effectively monitor and internally audit costs for education-related services and ensure the accuracy of these expenditures.

- 4. **The district and the town do not have a comprehensive plan to improve and maintain its buildings and to ensure the effective use of buildings and operational systems. Staffing of facilities is incomplete.**
 - A. A comprehensive review of available documents by the review team indicated that neither a long-term capital improvement plan nor a preventive maintenance manual was available or public.
 - B. Upon inquiry, district leaders and town officials told the review team that the district did not have a comprehensive capital improvement plan for its buildings and systems, or a preventive maintenance manual.
 - 1. A town official stated that the district had only a short, informal informational document for capital improvements. The town plans to hire an engineer who will serve as townwide maintenance officer and have responsibility for compiling a comprehensive capital plan.
 - C. The district had a head custodian who retired recently and has not been replaced. The head custodian's only districtwide responsibility was for accepting supply deliveries to a central location and monitoring inventory.

- D. The district does not have a buildings or facilities manager. The superintendent is responsible for buildings and grounds, including areas such as appropriate use of pesticides and water testing for the presence of lead, while the executive director of finance and administration is responsible for the financial costs associated with buildings and grounds. Given the depth and complexity of the superintendent's other responsibilities, the review team found the idea that he bore responsibility for pesticide and lead testing to be a concrete example of the consequence of a hollowed-out central-office staffing pattern.
- E. There is no preventative maintenance manual at either the district or the town level.
 - 1. The absence of a capital improvement plan and a preventative maintenance manual were noted in the 2010 district review.

Impact: Without the appropriate staff and a coherent plan for consistent and proactive maintenance, the district cannot reliably provide safe, secure, and well-maintained teaching and learning environments that are conducive to teaching and learning. Awareness of issues and planning for near and long-term building and systems needs is essential in the effective and high-quality management of facilities.

Recommendations

- 1. **The district should review whether its current allocation of resources effectively meets the goals and priorities needed to improve students' performance, opportunities, and outcomes, and reallocate resources as necessary.**
 - A. District leaders should consider offering all stakeholders an opportunity to voice their concerns over the current level of staffing and materials resources.
 - 1. District leaders could begin this process by meeting with the principals and listening to any concerns they have about adequately addressing the need for curriculum leaders such as department heads, coaches, and content specialists, and academic materials in their schools.
 - a. This could also be an opportunity to remind the principals of the control granted to them through education reform for their school-level budgets. Principals can be encouraged to think and act in a proactive manner to address their staffing and academic resource needs in both the present timeframe and as they anticipate their budget requests for the next fiscal year. Principals should be encouraged to include educators and school councils in the development of their budgets.
 - 2. Both educators and students could also have their voices heard during this review of resource allocation. School-level meetings would offer an opportunity for educators and

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students to meet with district and school leaders and share their experiences of not having enough textbooks, workbooks, paper, and other supplies to provide quality education.

- B. District leaders should continuously review how and where it is allocating resources and how staffing and expenses are aligned with academic and student needs.
- C. If district leaders determine that a re-allocation of resources would be beneficial to improve student outcomes, the superintendent should communicate any changes in budget allocations to all stakeholders, along with the rationale for those changes.

Benefits from implementing this recommendation will include a transparent and comprehensive process to address the concerns of stakeholders about the effectiveness of the district's budget, and its role in helping to meet the primary goal of supporting and improving student performance outcomes.

Recommended resources:

- *Shifting Resources Strategically to Fund District Priorities* (<https://dmgroupk12.com/solutions/strategic-budgeting>) describes how to reallocate existing funds to support key strategic efforts in three key areas: general education staffing levels, special education services, and federal funds such as Title I, II, and III. It also lists "Ten Mistakes to Avoid" and a list of reflection questions to guide districts' reallocation.
- *Transforming School Funding: A Guide to Implementing Student-Based Budgeting* (<https://www.erstrategies.org/cms/files/2752-student-based-budgeting-guide.pdf>), from Education Resource Strategies, describes a process to help districts tie funding to specific student needs.
- DESE's Turnaround Sustainability Toolkit (<http://www.mass.gov/edu/docs/ese/accountability/turnaround/redesign/sustainability-toolkit.zip>) contains tools, frameworks, and resources designed to help district and school leaders effectively plan for sustainability of turnaround efforts. It was originally intended for schools whose School Redesign Grants are ending, but could be helpful for any school or district to consider when reallocating funds to support sustainability.
- *In Spending Money Wisely: Getting the Most from School District Budgets* (<https://dmgroupk12.com/> scroll down to Research section), authors Nathan Levenson, Karla Baehr, James C. Smith, and Claire Sullivan identify and discuss the top ten opportunities for districts to realign resources and free up funds to support strategic priorities. Drawing on the wisdom of leading thinkers, district leaders, and education researchers from across the country, the authors gathered a long list of opportunities for resource reallocation. To distill these down to the ten most high-impact opportunities, each opportunity was assessed based on its financial benefit, its impact on student achievement, its political feasibility, and its likelihood of success relative to the complexity of implementation.
- *Smarter School Spending for Student Success* (<http://smarterschoolspending.org/>) provides free processes and tools to help districts use their resources to improve student achievement.

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- *Per-Pupil Expenditure Reports* (<http://www.doe.mass.edu/finance/statistics/ppx14-18.html>) is a report series that provides summary and detail per pupil spending data for each school district.
 - DESE's *School Finance Statistical Comparisons* web page (<http://www.doe.mass.edu/finance/statistics/>) provides comparisons of per-pupil expenditure, long-term enrollment, teacher salaries, and special education direct expenditure trends.
 - The Rennie Center's *Smart School Budgeting* (<http://www.renniecenter.org/sites/default/files/2017-01/SmartSchoolBudgeting.pdf>) is a summary of existing resources on school finance, budgeting, and reallocation.
 - *Best Practices in School District Budgeting* (<http://www.gfoa.org/best-practices-school-district-budgeting>) outlines steps to developing a budget that best aligns resources with student achievement goals. Each step includes a link to a specific resource document with relevant principles and policies to consider.
- 2. The district should develop a clear, comprehensive budget document that details how the budget supports district and school goals, how much schools and programs cost, and how outside funds are used. The district and the town should formalize in writing their agreement on municipal expenditures that are provided to the district.**
- A.** The district should develop a budget document that contains all essential information about the financial operations of the district.
1. All funding sources should be included with detailed spending plans. Estimated grant amounts, circuit breaker, school choice, and expenses from other revolving accounts would be included in this section.
- B.** The budget document should include information about how the budget supports district and school goals, as well as descriptions and subtotals for school and program staffing and costs.
1. The document should detail how student performance data, particularly data related to performance, access, and opportunity outcomes and gaps have been used to set budget priorities.
 2. The district should consider including in the budget document narratives explaining underlying assumptions and major changes.
- C.** At least two years of actual, clearly labeled expenses, the current year's budget numbers, and the proposed budget amounts should all be included. This financial data will allow stakeholders to make comparisons among years and recognize trends in actual and proposed spending.
- D.** The budget document should be made available to all constituents through the district's website. Access to the document should also be available at the district's central office for those stakeholders who may prefer a printed copy.

Saugus Public Schools Comprehensive District Review

- E. In compliance with 603 CMR 10:04, the district and the town should formalize in writing their agreement on municipal expenditures that are provided to the district.
1. The regulation lists 13 municipal expenses that can be reported as incurred on behalf of the district, plus other reporting information about insurance and retirement benefits.
 2. The district and the town should formalize their agreement by detailing the calculation process and/or amounts to be used in calculating municipal expenditures that are provided to the district.
 3. District leaders should review and revise the agreement with town officials annually, as needed.

Benefits: By implementing this recommendation, the district will have a comprehensive budget document that clearly presents the district's efforts to improve student outcomes through effective planning and implementation of goals and priorities. The superintendent, the school business administrator, and district and school leaders will all benefit from participating in a strategic process that will strengthen their capacity to communicate and manage the district's financial and improvement activities. A formal written agreement between the district and the town on financial responsibilities will contribute to a collaborative working relationship and clarity about district spending.

Recommended resources:

- *Best Practices in School District Budgeting* (<http://www.gfoa.org/best-practices-school-district-budgeting>) outlines steps to developing a budget that best aligns resources with student achievement goals. Each step includes a link to a specific resource document with relevant principles and policies to consider.
 - *Smarter School Spending for Student Success* (<http://smarterschoolspending.org/>) provides free processes and tools to help districts use their resources to improve student achievement.
 - *End-of-Year Financial Report* information can be found at <http://www.doe.mass.edu/finance/accounting/eoy/>.
 - DESE's web page on school finance laws and regulations (<http://www.doe.mass.edu/lawsregs/603cmr10.html?section=04>) provides a list of municipal payments commonly made on behalf of school districts.
3. **District administrators and town officials should develop a long-term capital improvement plan, as well as a preventative maintenance manual.**
- A. Using the best practices guidelines of the Massachusetts School Building Authority (MSBA), district leaders and town officials should create a 5- to 10-year facilities capital improvement plan that addresses deferred maintenance and replacement of buildings and/or their components.

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1. The plan should prioritize the needs of the district's six current school buildings as well as anticipate the structural and operating needs of the three buildings that the schools will occupy in 2021.
 2. An important component of the plan will be the estimated cost of present and future projects. The anticipated hiring of a maintenance engineer by the town will provide the district with a helpful and knowledgeable resource to assist with developing cost estimates.
 3. The district should consider expanding the responsibilities of the current head custodian position or a similar position to include districtwide planning and maintenance.
- B. MSBA also offers guidance on the development of a written maintenance manual for custodial and routine maintenance standards.
1. The manual should include cleaning and maintenance standards, operating instructions for equipment and mechanical systems such as heat and electrical and an inspection schedule. Material Safety Data Sheets for hazardous chemicals and materials should also be included in the manual.
 2. Each school building should have an accessible, written manual, which is reviewed and revised regularly, as needed.

Benefits: Long-term capital planning will help ensure that buildings are environmentally safe, in good repair, and conducive to teaching and learning. Long-term planning will also reduce the cost of maintenance and repairs, enabling the district to allocate more resources to improving all students' performance, opportunities, and outcomes.

Recommended resources:

- DESE's *School Building Issues* web page (<http://www.doe.mass.edu/finance/sbuilding/>) includes funding opportunities, guidelines, and resources related to school buildings.
- *Planning Guide for Maintaining School Facilities* (<http://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2003347>), from the National Center for Education Statistics, is intended to help school districts plan for efficient and effective operations. It addresses various topics, including conducting a facilities audit, planning and evaluating maintenance, and managing staff and contractors.
- *The Massachusetts School Checklist* (<http://www.mass.gov/eohhs/gov/departments/dph/programs/environmental-health/exposure-topics/iaq/iaq-methods/the-mass-school-checklist.html>) is a list of the most important environmental health and safety issues for schools to address. It includes regulations and industry standards/guidelines related to elements on the checklist, as well as additional resources.

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- The Green Ribbon Schools Award honors schools that are exemplary in reducing environmental impact and costs, improving the health and wellness of students and staff, and delivering effective environmental and sustainability education. The district might find several related resources useful, including Massachusetts' *Green Ribbon Schools Award Resource Guide* (<http://www.doe.mass.edu/finance/sbuilding/GreenRibbon/ResourcesGuide.pdf>) and the US Department of Education's *Green Strides* resource list (<http://www2.ed.gov/about/inits/ed/green-strides/resources.html>).
- MassEnergyInsight (<https://www.massenergyinsight.net/home>) is a free, web-based tool made available by the Massachusetts Department of Energy Resources as part of the Massachusetts Green Communities Program. The tool is designed to help communities learn about and monitor energy use and related costs, plan energy efficiency programs, and communicate this information.

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

Review Team Members

The review was conducted from March 18–21, 2019, by the following team of independent DESE consultants.

1. Andrew Bundy, Leadership and Governance, *review team coordinator*
2. Suzanne Kelly, Curriculum and Instruction
3. Patricia Williams, Assessment
4. Frank Sambuceti, Human Resources and Professional Development
5. Valerie Murphy, Student Support
6. Marge Foster, Financial and Asset management

District Review Activities

The following activities were conducted during the review:

The team conducted interviews with the following financial personnel: the Saugus Public Schools executive director of finance and administration, payroll clerk, accounts payable clerk, and human resources clerk, the town manager, town accountant, and town finance director.

The team conducted interviews with all five members of the school committee: chair, vice-chair, and three members.

The review team conducted interviews with the following representatives of the teachers' association: president, vice-president for elementary, vice-president for middle, and vice president for high school.

The team conducted interviews/focus groups with the following central office administrators: the executive director for finance and administration; the executive director for curriculum, instruction and assessment; and the executive director for pupil personnel services and special education.

The team visited the following schools: Saugus High School (grades 9–12); Belmonte Middle School (grades 6–8); Lynnhurst (K–5), Oaklandvale (K–5), Veterans (K–5), and Waybright (K–5).

During school visits, the team conducted interviews/focus groups with 12 students, 4 members of students' families, and 6 principals, and focus groups with 5 elementary-school teachers, 19 middle-school teachers, and 15 high-school teachers. The team also interviewed an external literacy coach and a member of the staff of the Statewide System of Support, each of whom currently works with the Saugus Public Schools.

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The team observed 64 classes throughout the district: 20 at the high school, 17 at the middle school, and 27 at the 4 elementary schools. The team observed 29 ELA classes, 17 mathematics classes, and 18 classes in other subject areas. Among the classes observed were three special education classes and one ELL class. The observations were approximately 20 minutes in length. All review team members collected data using DESE's Instructional Inventory, a tool for recording observed characteristics of standards-based teaching.

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 and the New England Association of Schools and Colleges (NEASC).
- District documents such as school improvement plans, school committee meeting notes, the collective bargaining agreement, school schedules, and the district's end-of-year financial reports.
- All completed administrator evaluations, and a random selection of completed teacher evaluations.

Site Visit Schedule

Monday 3/18/19	Tuesday 3/19/19	Wednesday 3/20/19	Thursday 3/21/19
Orientation with district leaders and principals; interviews with district staff and principals; document reviews; and visits to the Veterans and Lynnhurst elementary schools and Belmonte Middle School for classroom observations.	Interviews with district staff and principals; review of personnel files; teacher focus groups; students and students' families focus groups; and visits to Belmonte Middle School and Saugus High School for classroom observations.	Interviews with school leaders; interviews with school committee members; interview with teachers' association; visits to Oaklandvale and Waybright elementary schools and Saugus High School for classroom observations.	Interviews with school leaders; interviews with town personnel; interview with external coaches; district review team meeting; visits to Belmonte Middle School and Saugus High School for classroom observations; district wrap-up meeting with the superintendent.

Appendix B: Enrollment, Attendance, Expenditures

**Table B1a: Saugus Public Schools
2018–2019 Student Enrollment by Race/Ethnicity**

Group	District	Percent of Total	State	Percent of Total
African-American	127	4.9%	87,104	9.2%
Asian	134	5.1%	66,890	7.0%
Hispanic	489	18.7%	197,644	20.8%
Native American	15	0.6%	2,159	0.2%
White	1,776	68.1%	561,096	59.0%
Native Hawaiian	3	0.1%	802	0.1%
Multi-Race, Non-Hispanic	65	2.5%	35,936	3.8%
All	2,609	100.0%	951,631	100.0%

Note: As of October 1, 2018

**Table B1b: Saugus Public Schools
2018–2019 Student Enrollment by High Needs Populations**

Group	District			State		
	N	Percent of High Needs	Percent of District	N	Percent of High Needs	Percent of State
Students w/ disabilities	446	36.2%	16.9%	173,843	38.0%	18.1%
Econ. Dis.	774	62.8%	29.7%	297,120	64.9%	31.2%
EL and Former EL	163	13.2%	6.2%	99,866	21.8%	10.5%
All high needs students	1,232	100.0%	46.6%	458,044	100.0%	47.6%

Notes: As of October 1, 2018. 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 2,645; total state enrollment including students in out-of-district placement is 962,297.

Saugus Public Schools Comprehensive District Review

**Table B2a: Saugus Public Schools
Attendance Rates by Student Group, 2015–2018**

Group	N (2018)	2015	2016	2017	2018	4-yr Change	State (2018)
African American/Black	119	95.0	95.5	94.6	94.6	-0.4	94.1
Asian	138	96.6	95.4	95.3	95.6	-1.0	96.2
Hispanic or Latino	479	94.0	93.6	93.4	93.1	-0.9	92.7
Multi-Race	67	94.2	93.0	94.6	94.6	0.2	94.4
White	1,932	94.1	93.9	93.6	93.3	-0.8	95.1
High Needs	1,325	93.3	92.8	92.8	92.4	-0.9	93.2
Econ. Dis.	921	92.5	92.3	92.3	91.7	-0.8	92.5
SWD	462	93.6	92.7	93.0	93.2	-0.4	92.9
EL	180	95.1	95.1	93.9	92.4	-2.7	93.3
All	2,752	94.2	94.0	93.7	93.4	-0.8	94.5

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 B2b: Saugus Public Schools
Chronic Absence Rates by Student Group*, 2015–2018**

Group	N (2018)	2015	2016	2017	2018	4-yr Change	State (2018)
African American/Black	119	16.1	11.0	19.7	12.6	-3.5	16.4
Asian	138	7.6	14.3	14.7	10.9	-3.3	7.6
Hispanic or Latino	479	18.6	18.3	18.1	22.3	3.7	22.5
Multi-Race	67	15.8	14.6	14.6	19.4	3.6	14.2
White	1,932	13.7	16.3	18.8	18.5	4.8	10.0
High Needs	1,325	20.6	22.7	24.1	25.9	5.3	20.1
Econ. Dis.	921	24.4	26.3	27.5	29.5	5.1	22.9
SWD	462	19.2	21.8	21.6	21.0	1.8	20.7
EL	180	16.0	13.1	18.6	31.1	15.1	20.4
All	2,752	14.2	16.3	18.3	18.6	4.4	13.2

* The percentage of students absent 10 percent or more of their total number of student days of membership in a school

Table B3: Saugus Public Schools Expenditures, Chapter 70 State Aid, and Net School Spending Fiscal Years 2016-2018

	FY16		FY17		FY18	
	Estimated	Actual	Estimated	Actual	Estimated	Actual
Expenditures						
From local appropriations for schools:						
By school committee	\$28,175,250	\$27,682,789	\$28,575,250	\$28,218,322	\$29,075,250	\$28,418,305
By municipality	\$16,605,355	\$15,909,759	\$16,724,758	\$17,682,635	\$18,942,027	\$23,747,824
Total from local appropriations	\$44,280,605	\$43,592,548	\$44,900,008	\$45,900,957	\$48,017,277	\$52,166,129
From revolving funds and grants	--	\$3,620,283	--	\$3,734,700	--	\$3,584,145
Total expenditures	--	\$47,212,831	--	\$49,635,657	--	\$55,750,274
Chapter 70 aid to education program						
Chapter 70 state aid*	--	\$5,338,002	--	\$5,488,812	--	\$5,569,152
Required local contribution	--	\$24,111,062	--	\$23,261,068	--	\$23,048,854
Required net school spending**	--	\$29,449,064	--	\$28,749,880	--	\$28,618,006
Actual net school spending	--	\$37,684,436	--	\$40,695,350	--	\$42,739,904
Over/under required (\$)	--	\$8,235,372	--	\$11,945,470	--	\$14,121,898
Over/under required (%)	--	28.0%	--	41.5%	--	49.3%

* 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: FY16, FY17, and FY18 District End-of-Year Reports, Chapter 70 Program Information on ESE website
Data retrieved 11/13/18

Saugus Public Schools Comprehensive District Review

**Table B4: Saugus Public Schools
Expenditures Per In-District Pupil
Fiscal Years 2015–2017**

Expenditure Category	2015	2016	2017
Administration	\$323	\$446	\$469
Instructional leadership (district and school)	\$1,108	\$983	\$1,103
Teachers	\$5,374	\$5,789	\$5,827
Other teaching services	\$933	\$968	\$1,083
Professional development	\$81	\$100	\$113
Instructional materials, equipment and technology	\$220	\$175	\$295
Guidance, counseling and testing services	\$353	\$386	\$322
Pupil services	\$1,075	\$1,116	\$1,133
Operations and maintenance	\$1,125	\$1,112	\$1,174
Insurance, retirement and other fixed costs	\$3,197	\$3,170	\$3,968
Total expenditures per in-district pupil	\$13,789	\$14,246	\$15,487

Sources: Per-pupil expenditure reports on ESE website

Note: Any discrepancy between expenditures and total is because of rounding.

Appendix C: Instructional Inventory

Focus Area #1: Learning Objectives & Expectations		Insufficient Evidence	Limited Evidence	Sufficient Evidence	Compelling Evidence	Avg Number of points
		(1)	(2)	(3)	(4)	(1 to 4)
1. The teacher demonstrates knowledge of the subject matter.	ES	15%	14%	63%	11%	2.7
	MS	6%	35%	53%	6%	2.6
	HS	5%	30%	60%	5%	2.7
	Total #	16	15	38	5	2.7
	Total %	9%	23%	59%	8%	
2. The teacher ensures that students understand what they should be learning in the lesson and why.	ES	7%	44%	48%	0%	2.4
	MS	12%	59%	18%	12%	2.3
	HS	5%	55%	40%	0%	2.4
	Total #	5	33	24	2	2.4
	Total %	8%	52%	38%	3%	
3. The teacher uses appropriate classroom activities well matched to the learning objective(s).	ES	4%	26%	48%	22%	2.9
	MS	18%	41%	35%	6%	2.3
	HS	5%	40%	55%	0%	2.5
	Total #	5	22	30	7	2.6
	Total %	8%	34%	47%	11%	
4. The teacher conducts frequent checks for student understanding, provides feedback, and adjusts instruction.	ES	0%	19%	70%	11%	2.9
	MS	18%	53%	29%	0%	2.1
	HS	20%	45%	35%	0%	2.2
	Total #	7	23	31	3	2.5
	Total %	11%	36%	48%	5%	
Total Score For Focus Area #1	ES					10.9
	MS					9.3
	HS					9.7
	Total					10.1

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Focus Area #2: Student Engagement & Higher-Order Thinking		Insufficient Evidence	Limited Evidence	Sufficient Evidence	Compelling Evidence	Avg Number of points
		(1)	(2)	(3)	(4)	(1 to 4)
5. Students assume responsibility to learn and are engaged in the lesson.	ES	4%	19%	52%	26%	3.0
	MS	12%	53%	29%	6%	2.3
	HS	20%	45%	35%	0%	2.2
	Total #	7	23	26	8	2.5
	Total %	11%	36%	41%	13%	
6. Students engage in higher-order thinking.	ES	11%	44%	37%	7%	2.4
	MS	24%	71%	6%	0%	1.8
	HS	20%	55%	20%	5%	2.1
	Total #	11	35	15	3%	2.2
	Total %	17%	55%	23%	5%	
7. Students communicate their ideas and thinking with each other.	ES	7%	30%	56%	7%	2.6
	MS	35%	24%	35%	6%	2.1
	HS	40%	30%	30%	0%	1.9
	Total #	16	18	27	3	2.3
	Total %	25%	28%	42%	5%	
8. Students engage with meaningful, real-world tasks.	ES	7%	33%	44%	15%	2.7
	MS	12%	41%	35%	12%	2.5
	HS	25%	25%	40%	10%	2.4
	Total #	9	21	26	8	2.5
	Total %	14%	33%	41%	13%	
Total Score For Focus Area #2	ES					10.7
	MS					8.7
	HS					8.5
	Total					9.5

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Focus Area #3: Inclusive Practice & Classroom Culture		Insufficient Evidence	Limited Evidence	Sufficient Evidence	Compelling Evidence	Avg Number of points
		(1)	(2)	(3)	(4)	(1 to 4)
9. The teacher ensures that students are engaging in challenging tasks regardless of learning needs.	ES	11%	59%	15%	15%	2.3
	MS	18%	75%	6%	0%	1.9
	HS	30%	60%	10%	0%	1.8
	Total #	12	41	7	4	2.0
	Total %	19%	64%	11%	6%	
10. The teacher uses a variety of instructional strategies.	ES	4%	26%	56%	15%	2.8
	MS	12%	59%	29%	0%	2.2
	HS	25%	55%	20%	0%	2.0
	Total #	8	28	24	4	2.4
	Total %	13%	44%	38%	6%	
11. Classroom routines and positive supports are in place to ensure that students behave appropriately.	ES	4%	11%	52%	33%	3.1
	MS	6%	24%	59%	12%	2.8
	HS	0%	30%	65%	5%	2.8
	Total #	2	13	37	12	2.9
	Total %	3%	20%	58%	19%	
12. The classroom climate is conducive to teaching and learning.	ES	7%	4%	59%	30%	3.1
	MS	12%	29%	59%	0%	2.5
	HS	0%	45%	55%	0%	2.6
	Total #	4	15	37	8	2.8
	Total %	6%	23%	58%	13%	
Total Score For Focus Area #3	ES					11.4
	MS					9.3
	HS					9.1
	Total					10.1

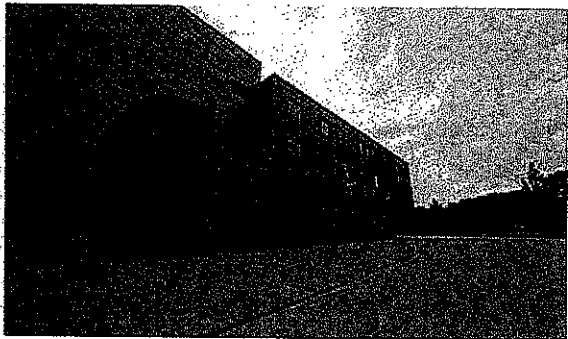
Exhibit 3

Report of Entry Findings

Erin McMahon

December 9, 2021

Saugus, MA



Vision

To create a school district that breeds a *culture* of academic excellence, understanding and inclusion, by establishing *consistency* in instructional expectations and ensuring that every child has access to the *quality* educational materials they need to succeed.

Preparing for a *post-covid* era, we must bounce back stronger than ever, taking the learnings that we have gained and channeling them toward the innovation of best practices.

Entry Process

Thank you to our Saugus Community for their input.

- ✓ The educator feedback survey to gather quantitative and qualitative data from our teachers (100 responses)
- ✓ Parents and Caregivers; over 250 responses in English, Portuguese, and Spanish.
- ✓ Over 70 1-1's with key staff members, School Committee members, Town Officials and Families

What's Next: Spring 2022

- Student feedback survey
- Strategic Planning - January - June 2022
- Planning for potential Early College collaboration(s)
- Curriculum audits, including literacy, PreK-5th grade

Saugus is growing slightly; student population is declining



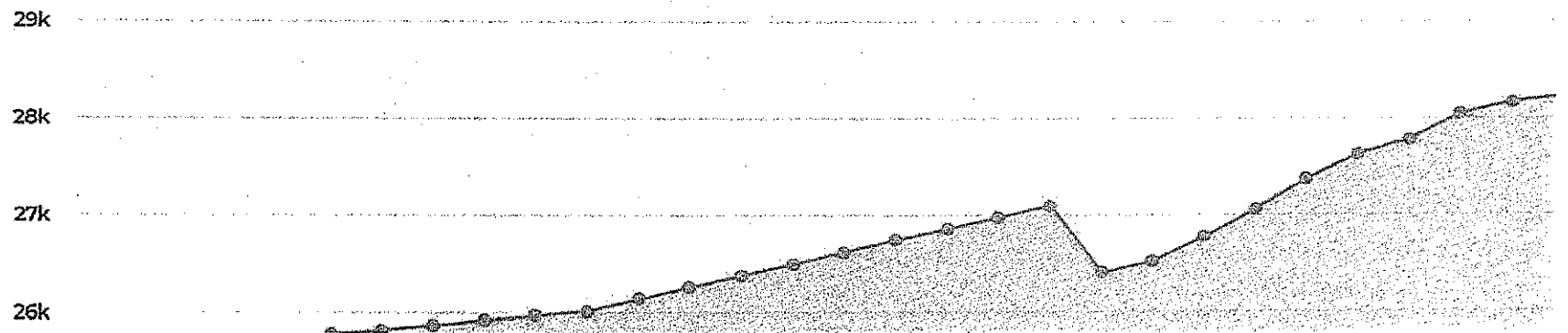
TOTAL POPULATION

28,215

▲ .2%
vs. 2018

GROWTH RANK

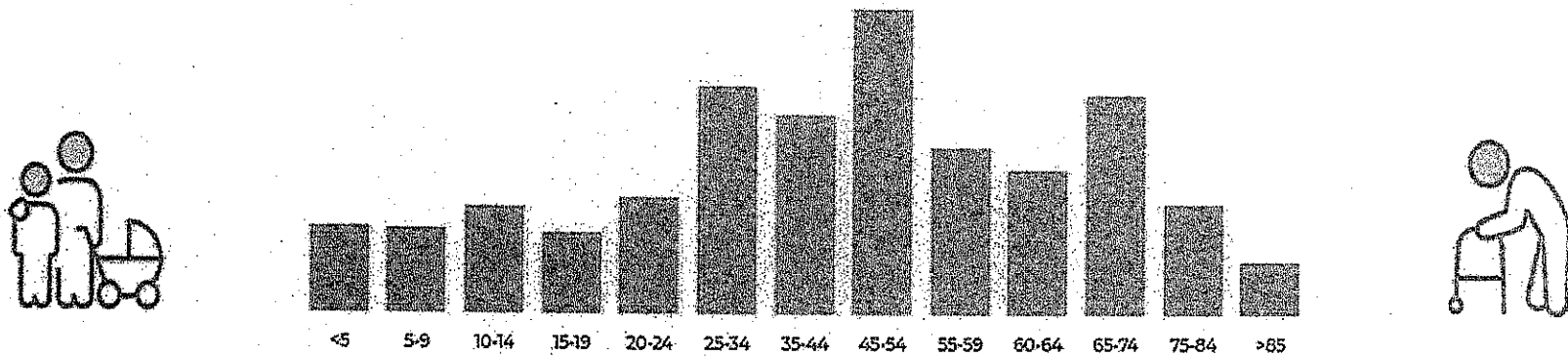
197 out of **351** Municipalities in Massachusetts



Source: ClearGov

There are fewer students in the Saugus K-12 System than retirees

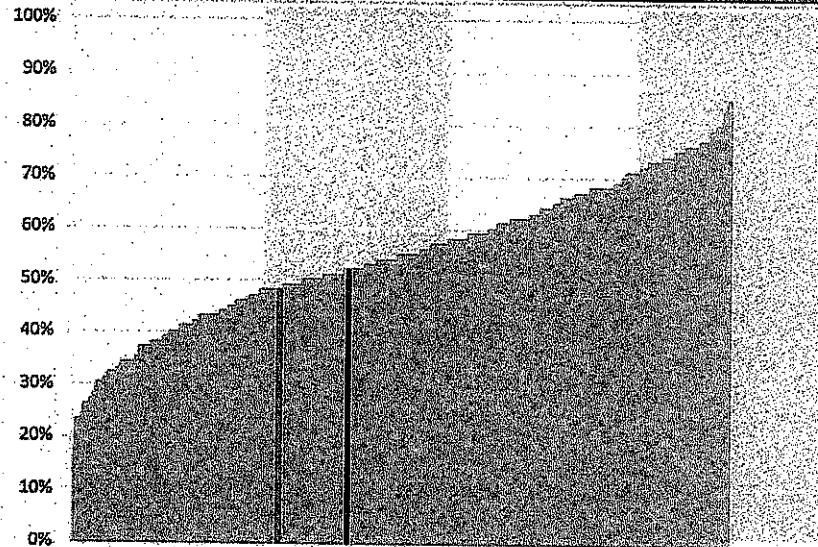
POPULATION BY AGE GROUP



*Data Source: American Community Survey, 2010 Census, 2000 US Census and 1990 US Census

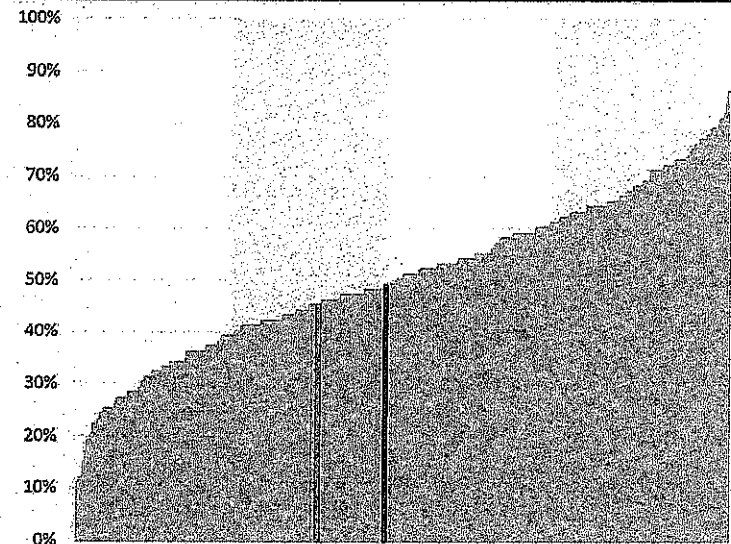
2019 MCAS Scores relative to districts relative to the State

2019 ELA: Pct Meets/Exceeds Expectations*



* Grades 3-8 Only

2019 Math: Pct Meets/Exceeds Expectations*



* Grades 3-8 Only

— State — Saugus

Data from the Resource Allocation and District Allocation Reports (RADAR)

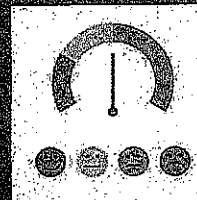
Data from the 2019 DESE Report and the Resource Allocation and District Allocation Reports (RADAR)

Saugus District – A summary of areas for improvement

NextGen MCAS and MCAS scores across all grades, districtwide	Inconsistency in quality of instruction district wide	Lack of rigorous learning opportunities	Lack of focus on the development of higher order thinking skills
Lack of focus on the diverse learning needs of all students	Insufficient feedback system for students (checking for understanding, feedback and adjustments)	Incomplete district improvement plans (DIP) and School improvement plans (SIP)	No sense of urgency in the district office
Insufficient training for staff and educators to administer effective teaching in new facilities	Incomplete data collection and analysis processes	Insufficient educator evaluation systems	Intransparent allocation of financial resources

Data from the 2019 DESE Report

2019 MCAS Scores relative to districts with similar student demographics and wealth



These similar-district lists are generated by algorithms using district type and size with: 1) student demographics, or 2) municipalities' personal income and property value	Grades Served	2019 \$/In-district Pupil	2020 Relative District Wealth	2020 Students				2019 NextGen MCAS								
				Total Enrolled	Econ. Disadv.	SWD	EL	Grades 3-8			Grade 10					
								% Meet or Exceed Expectations			Avg Student Growth Percentile (SGP)		% Meet or Exceed Expectations		Avg Student Growth Percentile (SGP)	
#	%	%	%	ELA	Math	Science	ELA	Math	ELA	Math	ELA	Math				
1) Districts with similar student demographics																
SAUGUS	PK-12	\$16,595	88%	2,607	32.5	18.2	7.5	48%	45%	46%	48.0	45.3	49%	40%	40.8	35.2
Agawan	PK-12	\$17,043	54%	3,670	30.1	16.2	4.6	50%	54%	46%	47.0	46.7	60%	59%	50.8	52.7
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Falmouth	PK-12	\$18,515	148%	3,251	29.5	18.2	4.4	63%	56%	58%	55.1	58.2	75%	66%	56.0	48.2
Gloucester	PK-12	\$17,014	101%	2,851	37.5	26.2	7.0	48%	43%	44%	47.8	48.0	47%	47%	47.8	38.2
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Rockland	PK-12	\$15,847	50%	2,273	36.0	17.4	7.8	51%	43%	45%	54.9	50.6	48%	45%	51.6	38.2
Stoughton	PK-12	\$15,112	62%	3,492	31.9	17.3	7.1	52%	47%	48%	49.7	48.3	58%	54%	43.8	45.9
Watertown	PK-12	\$21,078	161%	2,663	26.5	19.1	13.8	50%	48%	50%	50.4	54.3	61%	63%	42.9	69.9
Woburn	PK-12	\$17,538	92%	4,451	28.3	17.5	9.0	52%	46%	49%	46.1	46.2	63%	53%	56.1	43.8
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Northampton	PK-12	\$15,148	84%	2,698	25.7	20.1	3.3	54%	45%	48%	48.5	45.3	75%	70%	53.2	59.8
Sandwich	PK-12	\$18,523	89%	2,466	17.4	18.9	1.3	58%	53%	57%	55.3	47.3	68%	63%	56.6	40.8
Stonham	PK-12	\$16,233	100%	2,372	17.6	20.3	3.9	67%	58%	57%	61.5	61.1	79%	62%	60.6	36.2

Data from the Resource Allocation and District Allocation Reports (F)

What does
this data tell
us on two key
dimensions?

FINANCIAL

- Spending (\$/In-District Pupil) for Saugus is average in comparison to similar districts.
- Saugus has performed less well on NextGen MCAS tests from grades 3-8 and grade 10 in all categories, in comparison to districts with similar wealth

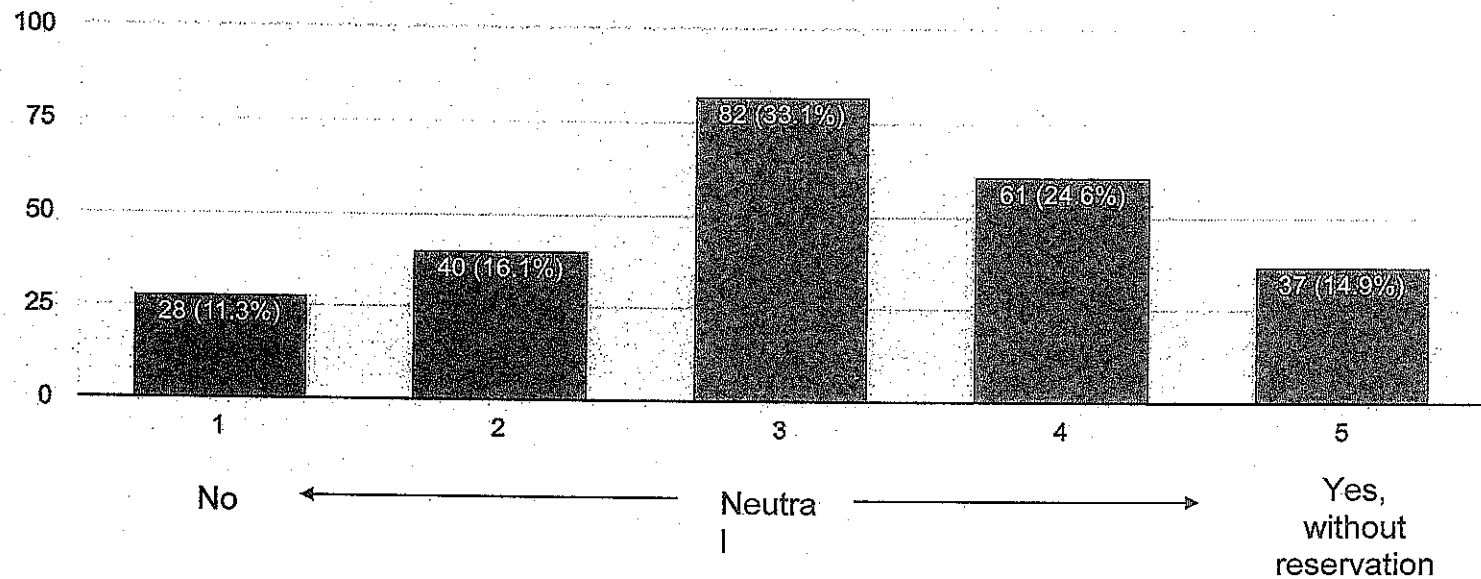
STUDENT DEMOGRAPHICS

- Saugus is among the lowest performing on MCAS in Grade 10 in ELA and math in comparison to districts with similar student demographics
- Saugus is performing lower on the NextGen MCAS in grades 3-8 than the state average
- Targeted Assistance (DESE) identified the “white, male” sub-group as requiring significant improvement

In the eyes of our parents...

Would you recommend Saugus Public Schools to other families of school-age children?

248 responses

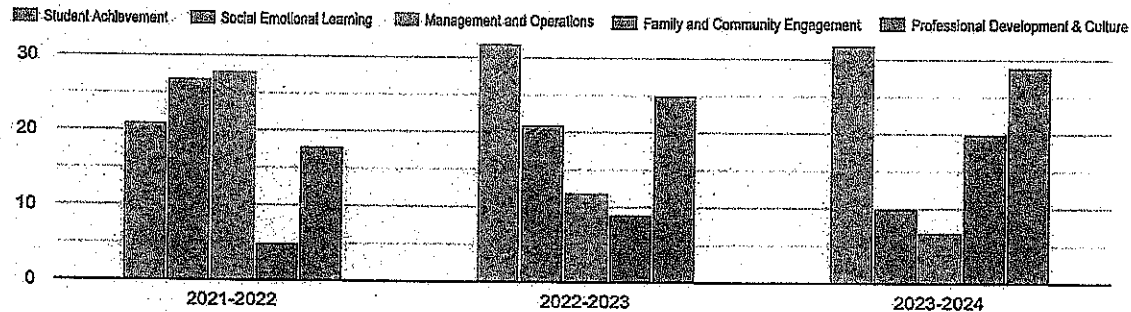
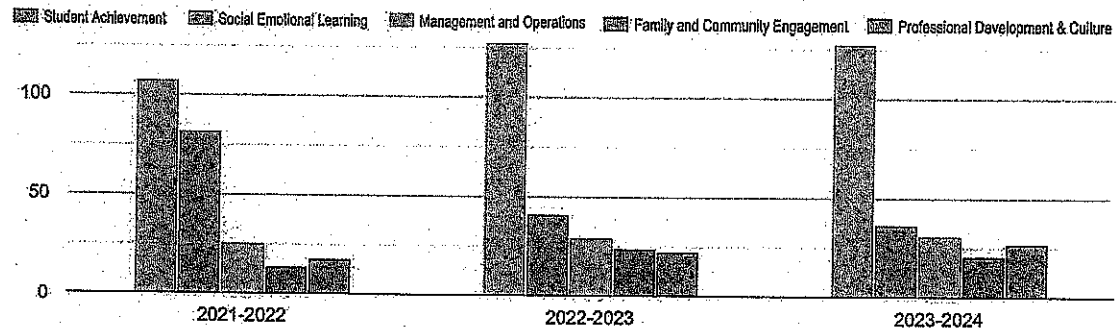


Side by side comparison of 3-year prioritization

Parents & Caregivers >

Teachers >

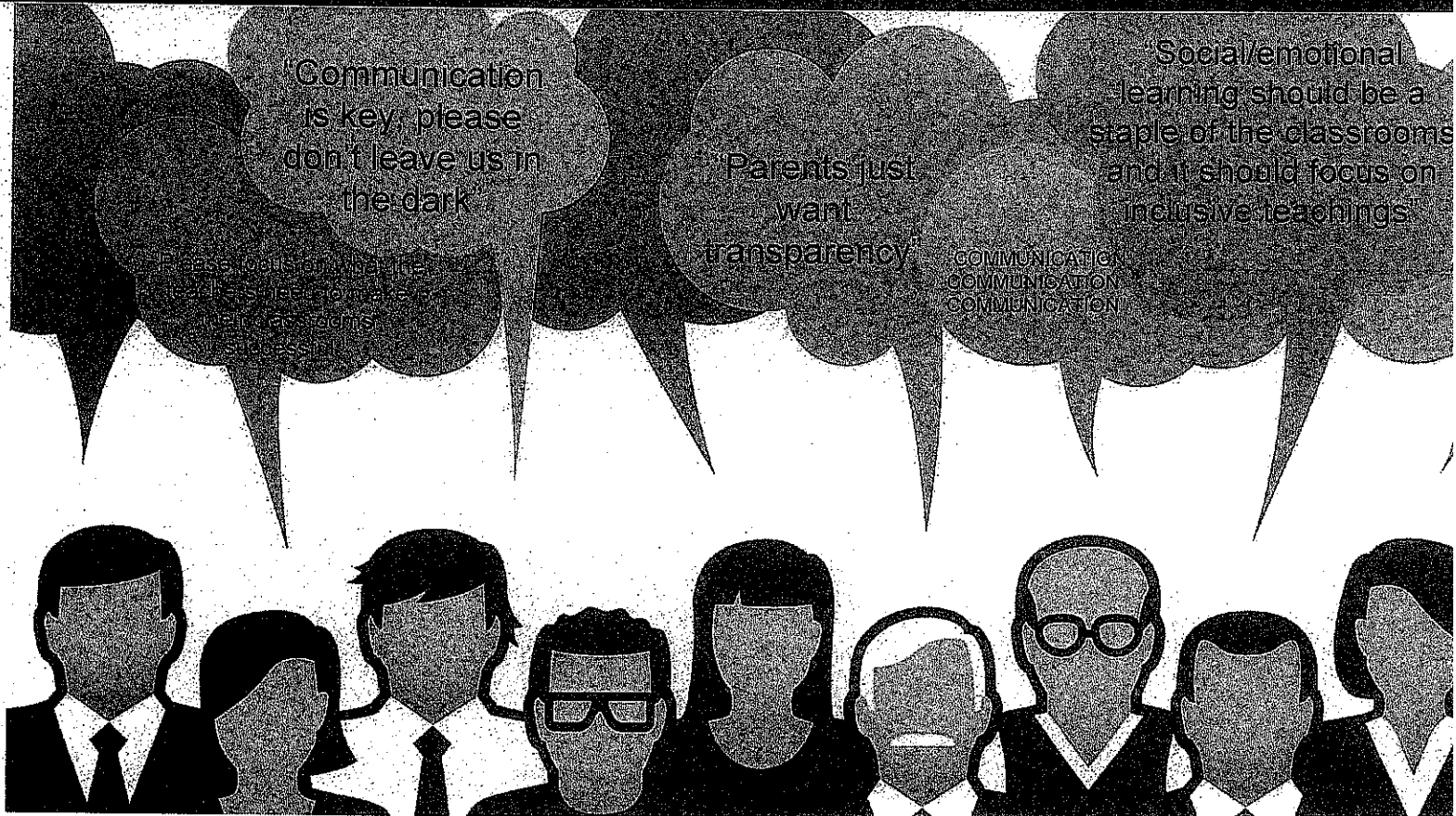
What should the Saugus Public Schools prioritize over the next three years?



What do our parents say they need?

Key Themes

- Communication
- Prioritize social / emotional needs of students
- Student Achievement
- Teacher Evaluation



What I heard motivates our educators

"A life long dream/desire to work with children in an academic setting to help them learn and grow in a safe, loving, respectful environment."
- 2nd-5th grade teacher

"Wanting to make a difference."
- K-1st grade teacher

"A desire to support students emotional well being"

"I wanted to be the teacher that I never had."
- 6th-8th grade teacher

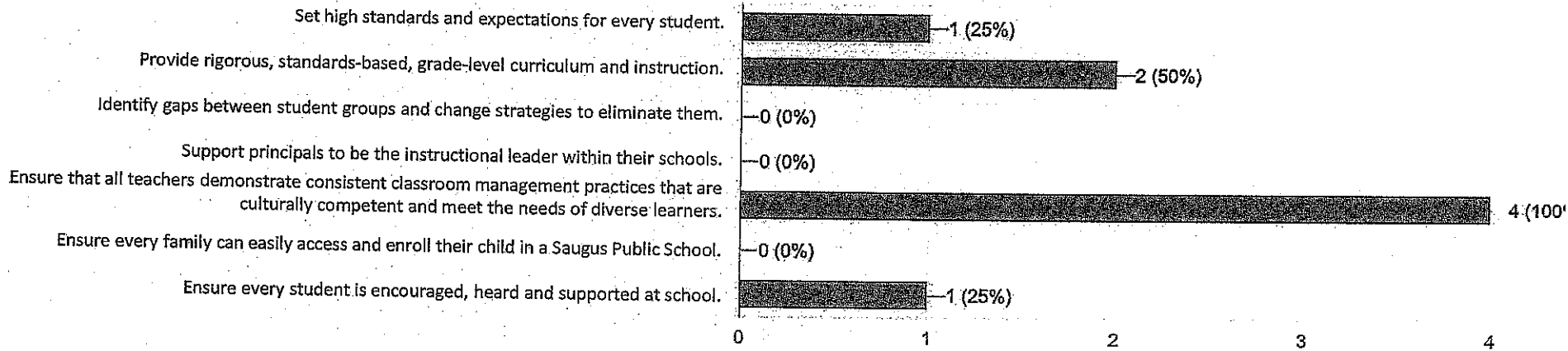
"I am an SHS alumni and wanted to make a difference in my town"



In the eyes of our school's committee members...

STUDENT ACHIEVEMENT:

In service of providing every student with an environment conducive to learning, please choose two of the following goals.

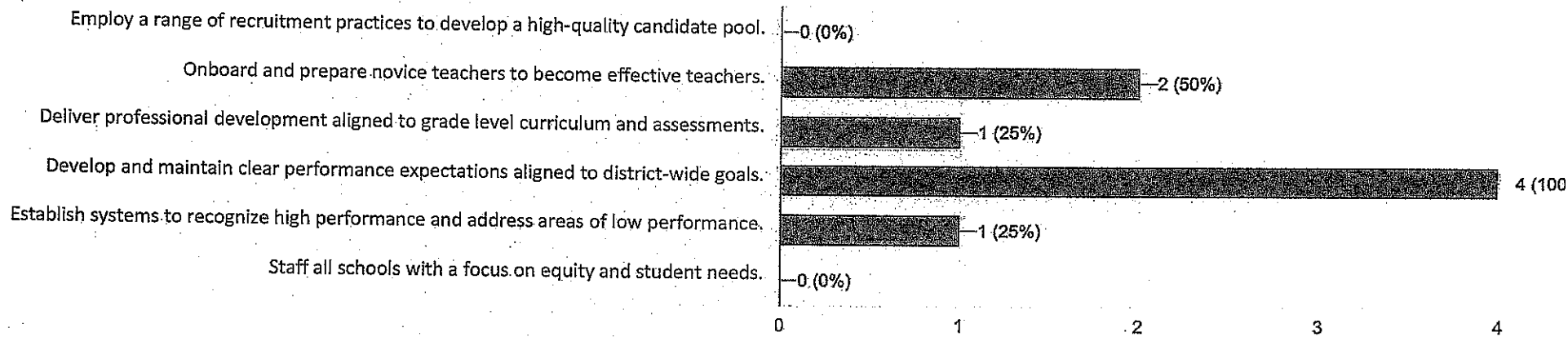


(Source: School System Equity and Excellence Framework)

In the eyes of our school's committee members...

EFFECTIVE INSTRUCTION:

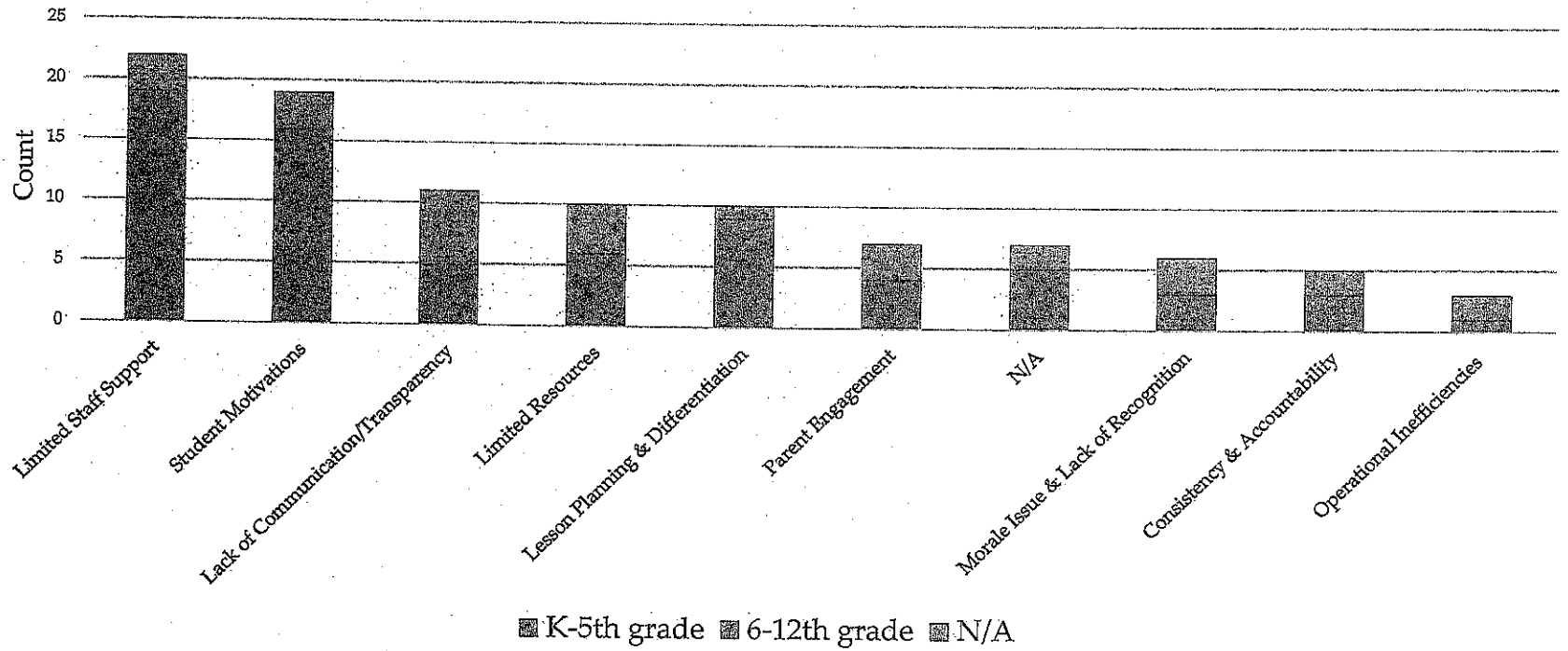
In order to attract, develop and retain exceptional talent, please choose two of the following goals.



(Source: School System Equity and Excellence Framework)

Dig deeper on the
survey data.

What challenges our educators?



Digging deeper, what did educators say?

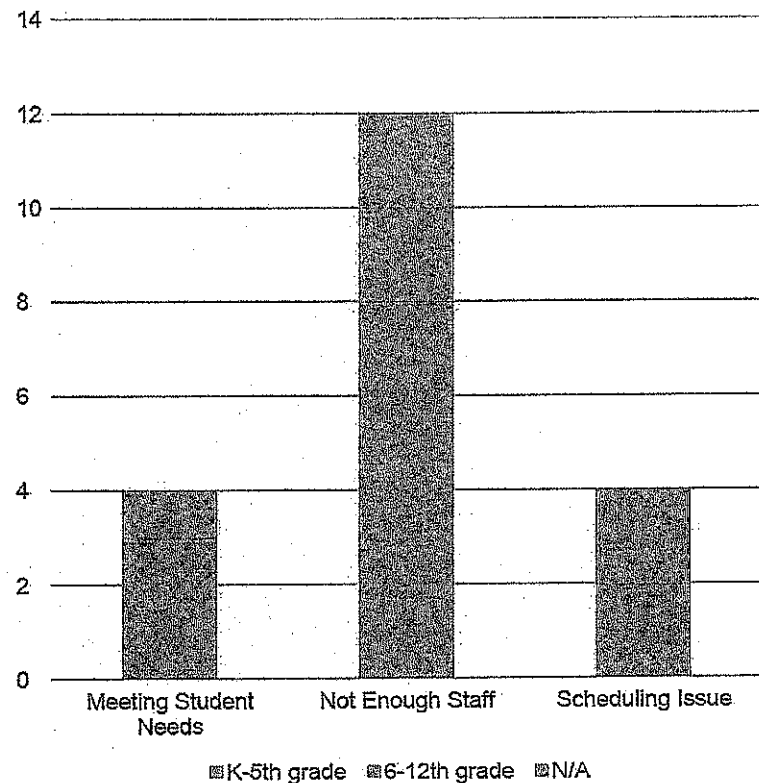
Each of the qualitative responses received were grouped into the following categories:

<i>Category</i>	<i>Example</i>
Limited Staff Support	"I'm currently being pulled in many directions to teach students at various levels"
Limited Resources	"Not being able to obtain appropriate software"
Parent Engagement	"Trying to get parents engaged in student learning"
Operational Inefficiencies	"Schedules often don't account for transitioning from one room to the next"
Student Motivation	"Students not completing work/not attending class regularly"
Consistency & Accountability for students / staff	"As an educator in the school complex: limited enforcement of rules / expectations"
Lesson Planning & Differentiation	"Differentiating instruction - to ensure the content is accessible to all learners"
Lack of Communication/Transparency	"Zero communication and a closed door policy "
Morale Issue & Lack of Recognition	"Not being acknowledged by my system"

Challenge #1 - "Limited Staff Support"

- **Meeting Student Needs:**
varied student levels in one class leaves teachers feeling like they can't fully accommodate to each child. Particular emphasis on ELL and students with IEPs.
- **Not Enough Staff*:**
Low teacher to student ratio in the classroom. Lack of specialized personnel in some cases.
- **Scheduling Issue:**
Teachers are finding it hard to balance paperwork, scheduling, maintaining classrooms on top of teaching.

*Prominent issue in K-5th grade



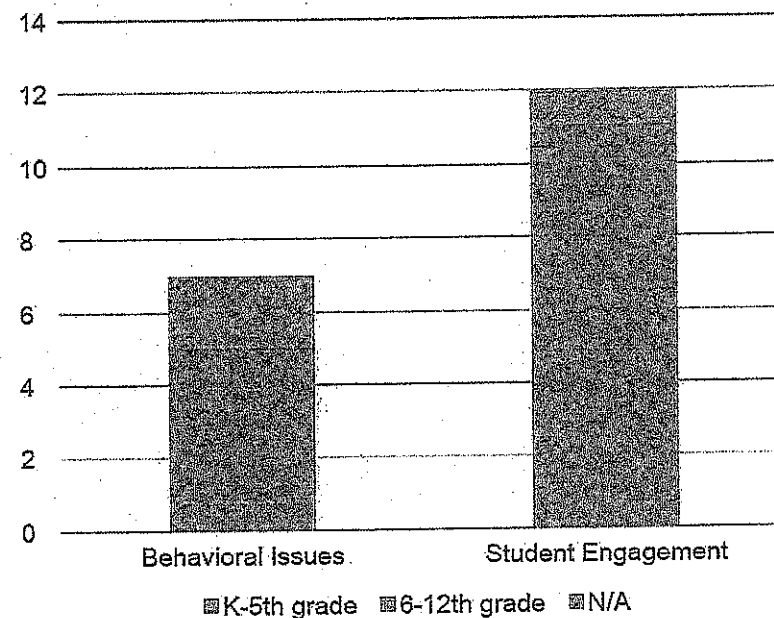
Comparison of regional districts' class sizes show we have similar to smaller student to staff ratios: an average of 20 students per class.

Districts	Enrolled students	K - 2	3 - 5	6 - 8	9 - 12
Saugus	2,607	19.4	21.6	19.9	20.4
Winthrop	1,965	21.4	20.7	22.4	21.8
Danvers	3,417	18.7	21.0	17.9	19.1
Peabody	5,994	20.2	19.2	22.3	20.0
Melrose	3,977	21.4	21.6	22.3	20.1
Lynnfield	2,202	19.9	22.4	20.5	17.7
Revere	7,532	21.2	21.3	22.8	22.1

Challenges #2: Student Motivation

- **Behavioral issues:**
some children are not attending school regularly and disciplinary issues within school.
- **Student engagement*:**
some teachers found motivating students to be difficult; worsened by the pandemic. Teachers noted that students seem uninterested in their subjects.

*Overwhelming representation in 6-12th grade.



Comparing Stakeholder Feedback to Outside Data

Limited Staff Support

- **We have staff, but they may not be in the most needed areas:** While the average class size is 20, there is a staff member for every ten students; the state average is 12.8.
- **We have a relatively experienced workforce:** 5% of our teachers are considered inexperienced, less than the state average.

Factors Impacting Student Engagement

- **Teacher Absenteeism:** 57% of our teachers missed 10 or more days of school, which is considered chronically absent.
- **Need to increase rigor:** We meet the state average for number of AP courses: 12 versus 12.4 but only 24%, or 171 of our high school students is taking at least one AP Course.
- **Student Motivation for College and Career:** 25% of our students are taking the SAT or ACT (177 students)
- **Disproportionate Suspension:** Black students are 2.3 times as likely to be suspended as White students.

Source: <https://projects.propublica.org/miseducation/district/2510500>

Challenges #3 & #4: Communication and Accountability

Communication / Transparency

Teachers:

- "Zero communication and a closed door policy"
- "lack of communication from superiors - not enough meetings nor professional development"
- "Lately it has been the lack of communication and planning at the upper level of administration ... the constant feeling as if we are trying to reinvent the wheel in order to meet the needs both of the state and the students."

Parents:

- "Better communication with families and with staff, it seems like we find out at the same time as them and teachers seem blindsided. As families I feel we don't find things out until last minute. I realize last year was unprecedented and honestly the year before seems like an eternity away but currently that's what I feel is lacking."
- "Give families adequate notice if there are changes in schedules"
- "Being more transparent about things like bus routes and if before/after school care is available"

Consistency and Accountability

Teachers:

- "Enforcing rules, when some teachers ignore them"
- "Lack of supervision"
- "As an educator in the school complex: limited enforcement of rules / expectations for students / staff"

Parents:

- "Saugus Public Schools needs to hold its teachers and administration accountable. Teachers not posting grades in X2 until the final week of a semester, (timeliness), teachers not meeting the required after school help session for students, teachers and administrators not responding to parent and outside tutor emails is just unacceptable. Administration should be running reports weekly in X2 for missing grades. **How does a student/parent/teacher know if the topic discussed was actually understood if grades are posted timely?** This is an issue that has gone on for years at SMS. No accountability."

Moving Forward

Dec - Jan

Cultivate and select team for Strategic Planning.

Plan for the Plan.

Feb-March

Conduct focus groups and surveys to ask and answer key questions.

Begin Planning.

April-May

Refine strategic plan and develop 1-3 goals for the next five years.

Plan.

June-July

Invite feedback from internal and external partners.

Refine the plan.

August

Present refined strategic plan to the School Committee.

Approach to Strategic Planning

- Place the children at the center of our decision making, always.
- Utilize existing data to drive improvement and actively seeking ways to gather more data.
- Invest in the development of our educators to ensure that we are providing top quality instruction.
- Ensure that teaching materials are up to date and accessible to all children regardless of race, ethnicity or socio-economic background.
- Take advantage of every opportunity to innovate so that we can push Saugus Public Schools from the bottom 10% to the top 10%.

Short-Term
Focus
(Next 6 months)

January - June 2022

#1: Continue to accelerate out of the pandemic, while developing belonging in our new school communities.

#2: Survey the students to better understand their hopes and dreams. Triangulate that data with other data.

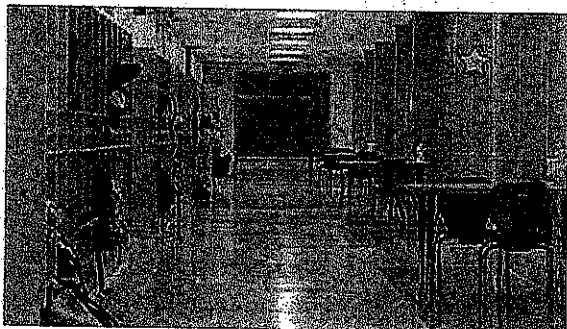
#3: Create a strategic plan for the next five years that takes us to the Top 10.

Vision for Learning Acceleration 2021-2022

Every student in Saugus, regardless of race, ethnicity, culture, gender, identity or home language, will be empowered to compete in an increasingly globalized society. They will thrive by accessing and engaging in grade-appropriate assignments, strong instruction, deep engagement, and teachers with high expectations. Teachers believe all students can achieve at advanced levels, while working to meet the diverse learning needs of all. By creating a sense of belonging through social emotional learning, students will feel welcomed, included, and celebrated at school.



Moving Forward...



1-3 Years

- Continue In-Person Learning
- Address Covid Learning Gaps For All Students
- Provide Physical, Mental Health And Well-Being Supports
- Address Attendance, Engagement, And Student Transitions
- Ensure High-Quality Curriculum & Instruction
- Recruit And Retain Talented Educator Workforce



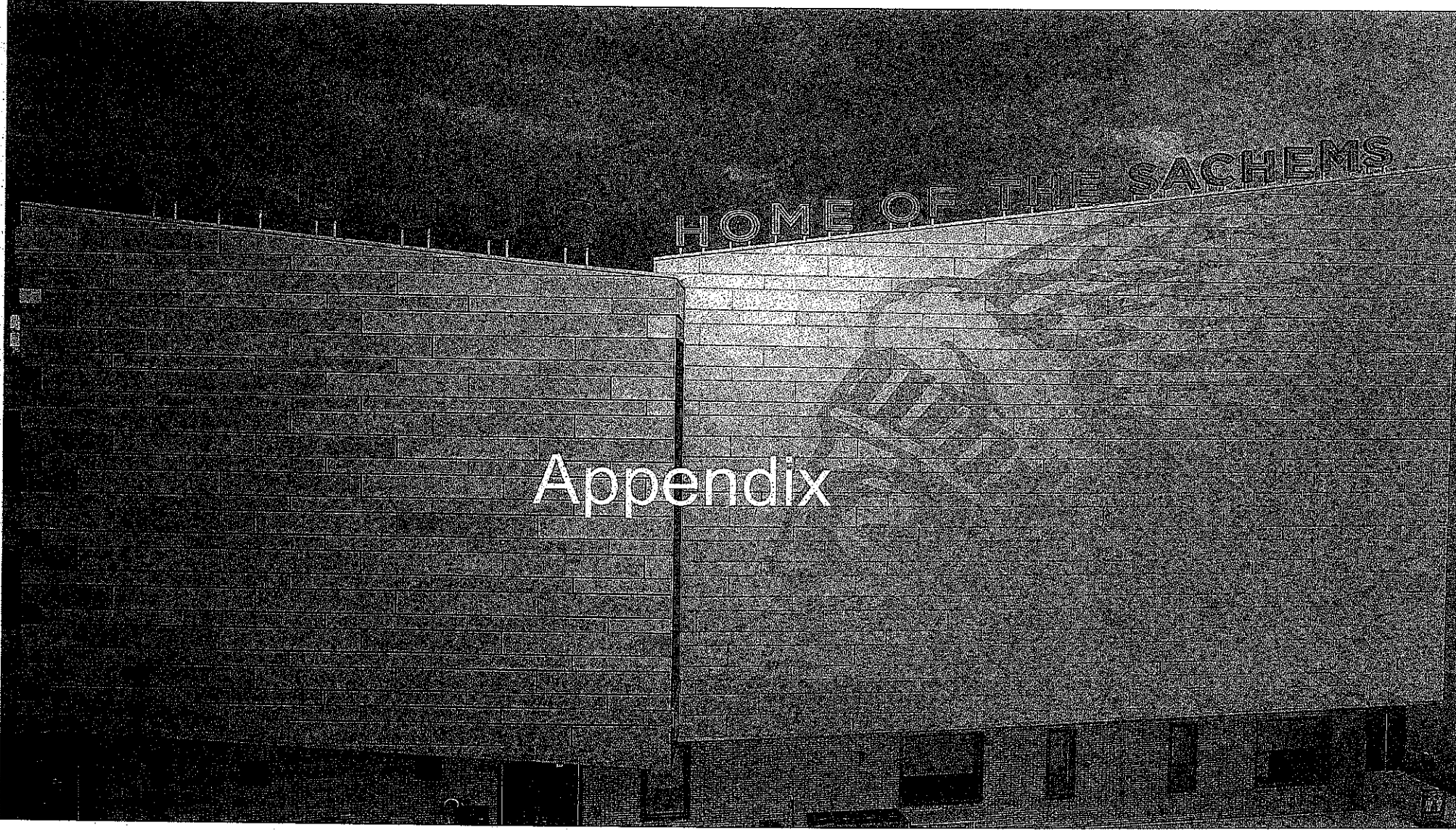
3-5 Years

- Ensure Students Stay On A Path To Postsecondary And Career Readiness
- Create Balanced Assessment & Accountability Systems
- Explore And Implement New Education Delivery Models (e.g. Early College, STEAM)



Source: The Coalition to Advance Student Success





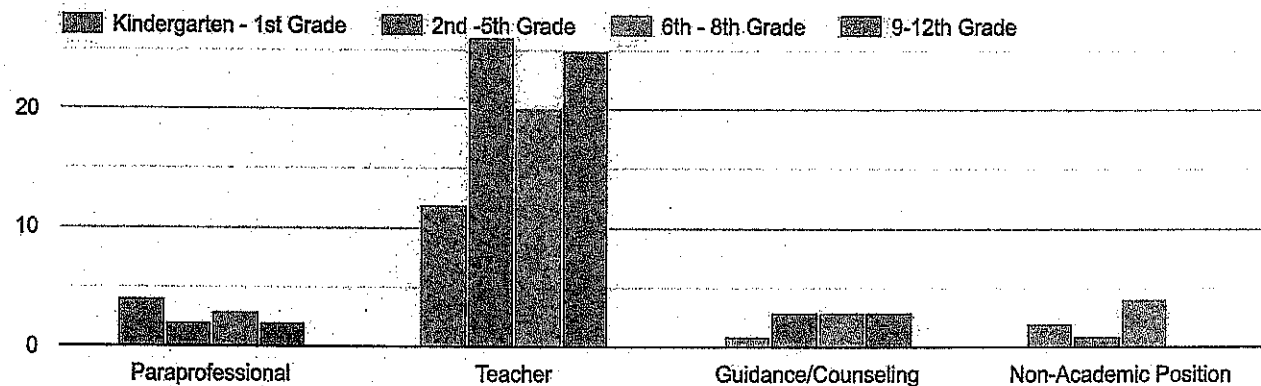
HOME OF THE SACHEMS

Appendix



Educator Feedback Survey

- Sent out online to all educators in Saugus Public Schools with the purpose of gathering qualitative data and insight from our educators
- Survey sent out on June 14th 2021, Responses collected July 1st 2021
- Number of responses: 100, Response rate: 46%
- Questions covered a range of topics including motivations, challenges, start-stop-continue suggestions and more
- Profile of educators that responded:



Parent & Caretaker Feedback Survey

- Sent out online to all parents in Saugus Public Schools with the purpose of gathering qualitative data and insight from our parent and caretakers
- Survey sent out on July 1 2021, Responses collected July 31st 2021
- Number of responses: 253, Response rate: 10%
- Questions covered a range of topics including motivations, challenges, start-stop-continue suggestions and more

Key takeaways:

- 24.8% of parents want to participate in a committee to help **shape communication strategy** in the district
- 31.8% of parents want to participate in a meeting to **discuss funding and budget allocation** for the district
- **79.6% of parents want to be contacted via email**, 13.1% prefer to be contacted via text, 3.7% prefer to be call

School Committee Feedback Survey

- Sent out online to all 5 members of the school committee
- Number of responses: 5*, Response rate: 100%

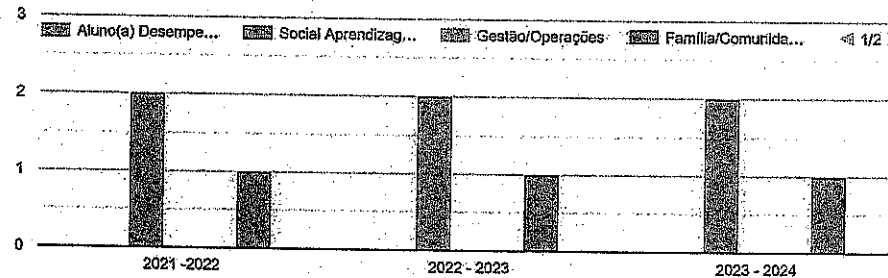
**of the 5 responses, one response was recorded as an oral response*

Key takeaways - Improvements that the team want to see over the next five years include:

- More rigorous teacher evaluations**
- Emphasis on perception of achievement**, in addition to improved student achievement
- Developing a team mentality** that is centered around professional development and student achievement
- Greater emphasis on the arts** both during and after school

Portuguese-speaking parents focus on Social Emotional Learning and Family Engagement

5. Qual deve ser a prioridade das Escolas Públicas de Saugus para os próximos três anos? *
 Marque apenas uma oval por fila



Ajudar nossos alunos a ser pessoas boas e gentis
 Olhar realmente a dificuldade de cada criança
 Seja dedicada e amorosa com todos
 Combater o bullying
 Ensinar com mais recursos
 Continuar dando assistência e atenção as famílias



Helping our students to be good and kind people
 Really look at each child's difficulty
 Be dedicated and loving to everyone
 fight bullying
 Teach with more resources
 Continue giving assistance and attention to families

Report of Entry Findings

Erin McMahon

December 9, 2021

Saugus, MA



Vision

To create a school district that breeds a *culture* of academic excellence, understanding and inclusion, by establishing *consistency* in instructional expectations and ensuring that every child has access to the *quality* educational materials they need to succeed.

Preparing for a *post-covid* era, we must bounce back stronger than ever, taking the learnings that we have gained and channeling them toward the innovation of best practices.

Entry Process

Thank you to our Saugus Community for their input.

- ✓ The educator feedback survey to gather quantitative and qualitative data from our teachers (100 responses)
- ✓ Parents and Caregivers; over 250 responses in English, Portuguese, and Spanish.
- ✓ Over 70 1-1's with key staff members, School Committee members, Town Officials and Families

What's Next: Spring 2022

- Student feedback survey
- Strategic Planning - January - June 2022
- Planning for potential Early College collaboration(s)
- Curriculum audits, including literacy, PreK-5th grade

Saugus is growing slightly; student population is declining



TOTAL POPULATION

28,215

▲ .2%
vs. 2018

GROWTH RANK

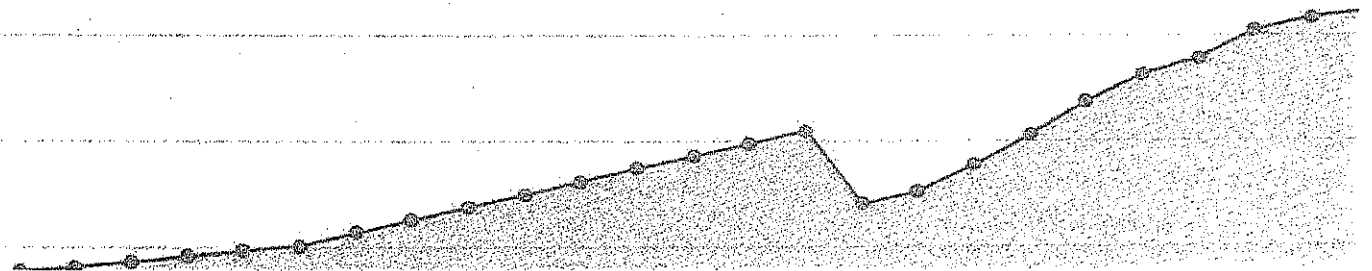
197 out of **351** Municipalities in Massachusetts

29k

28k

27k

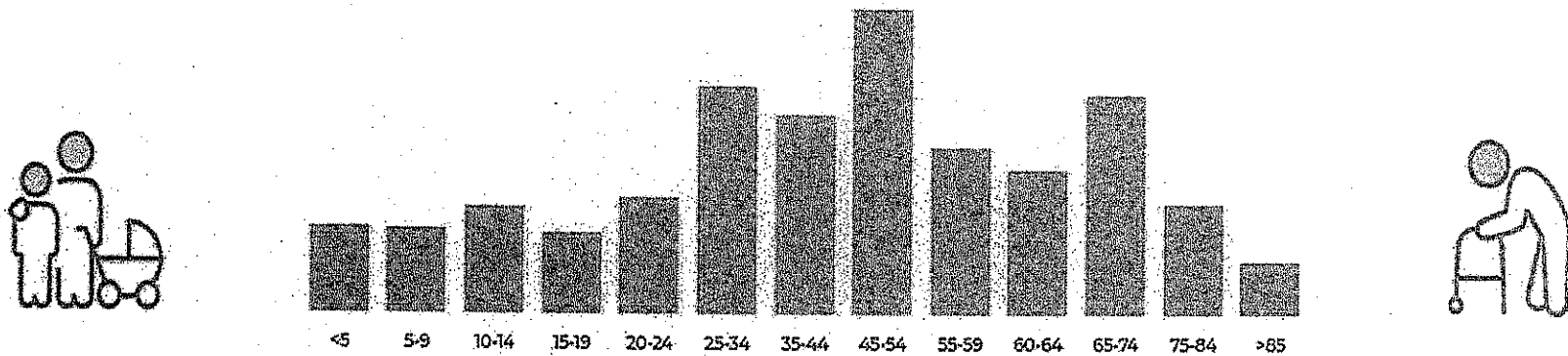
26k



Source: ClearGov

There are fewer students in the Saugus K-12 System than retirees

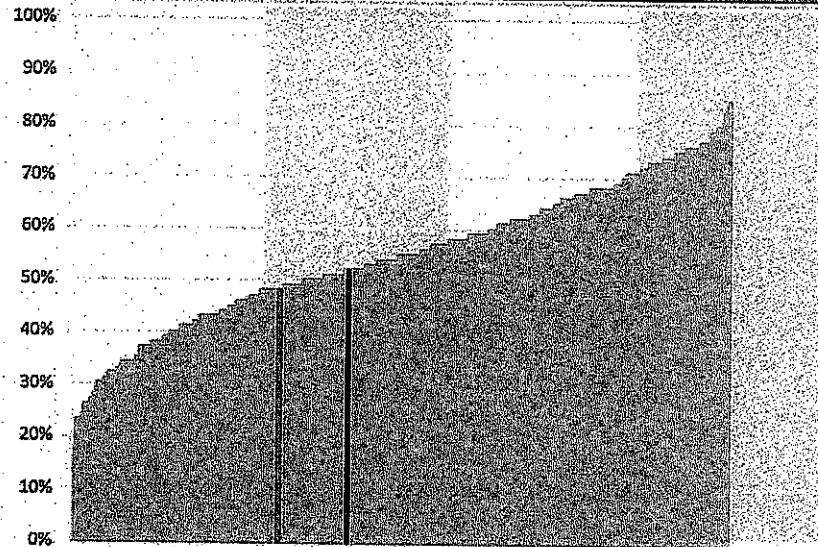
POPULATION BY AGE GROUP



*Data Source: American Community Survey, 2010 Census, 2000 US Census and 1990 US Census

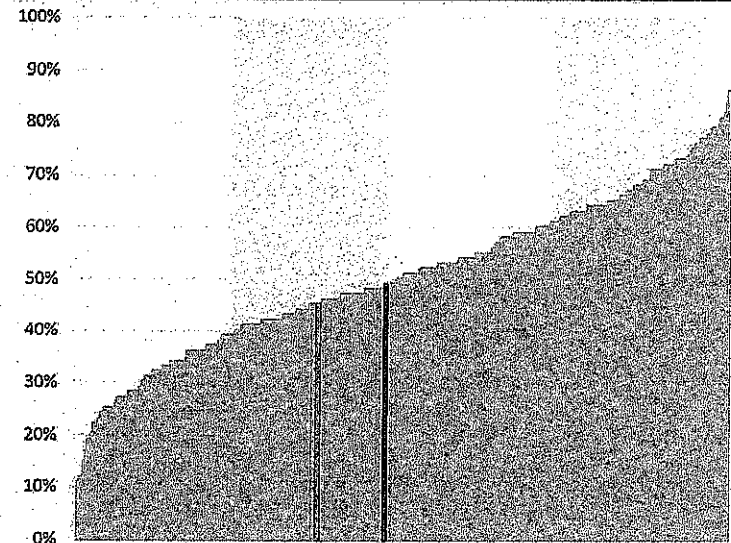
2019 MCAS Scores relative to districts relative to the State

2019 ELA: Pct Meets/Exceeds Expectations*



* Grades 3-8 Only

2019 Math: Pct Meets/Exceeds Expectations*



* Grades 3-8 Only

— State — Saugus

Data from the Resource Allocation and District Allocation Reports (RADAR)

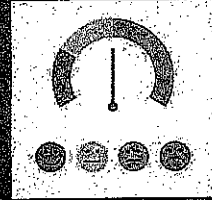
Data from the 2019 DESE Report and the Resource Allocation and District Allocation Reports (RADAR)

Saugus District – A summary of areas for improvement

NextGen MCAS and MCAS scores across all grades, districtwide	Inconsistency in quality of instruction district wide	Lack of rigorous learning opportunities	Lack of focus on the development of higher order thinking skills
Lack of focus on the diverse learning needs of all students	Insufficient feedback system for students (checking for understanding, feedback and adjustments)	Incomplete district improvement plans (DIP) and School improvement plans (SIP)	No sense of urgency in the district office
Insufficient training for staff and educators to administer effective teaching in new facilities	Incomplete data collection and analysis processes	Insufficient educator evaluation systems	Intransparent allocation of financial resources

Data from the 2019 DESE Report

2019 MCAS Scores relative to districts with similar student demographics and wealth



These similar-district lists are generated by algorithms using district type and size with: 1) student demographics, or 2) municipalities' personal income and property value	Grades Served	2019 \$/In-district Pupil	2020 Relative District Wealth	2020 Students				2019 NextGen MCAS								
				Total Enrolled	Econ. Disadv.	SWD	EL	Grades 3-8			Grade 10					
								% Meet or Exceed Expectations			Avg Student Growth Percentile (SGP)		% Meet or Exceed Expectations		Avg Student Growth Percentile (SGP)	
#	%	%	%	ELA	Math	Science	ELA	Math	ELA	Math	ELA	Math				
1) Districts with similar student demographics																
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Foxborough	PK-12	\$17,343	85%	2,554	16.2	20.7	2.5	56%	63%	55%	53.5	54.8	71%	81%	52.8	38.0
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Medfield	PK-12	\$16,013	106%	2,601	5.0	12.7	0.7	75%	71%	69%	52.3	51.4	79%	83%	52.1	69.7
North Reading	PK-12	\$16,211	95%	2,397	8.1	18.2	0.5	75%	73%	75%	58.8	57.8	78%	74%	58.7	59.8
Northampton	PK-12	\$15,148	84%	2,698	25.7	20.1	3.3	54%	45%	48%	48.5	45.3	75%	70%	53.2	59.8
Sandwich	PK-12	\$18,523	89%	2,466	17.4	18.9	1.3	58%	53%	57%	55.3	47.3	68%	63%	56.6	40.8
Stonham	PK-12	\$16,233	100%	2,372	17.6	20.3	3.9	67%	58%	57%	61.5	61.1	79%	62%	60.6	36.2

Data from the Resource Allocation and District Allocation Reports (F)

What does
this data tell
us on two key
dimensions?

FINANCIAL

- Spending (\$/In-District Pupil) for Saugus is average in comparison to similar districts.
- Saugus has performed less well on NextGen MCAS tests from grades 3-8 and grade 10 in all categories, in comparison to districts with similar wealth

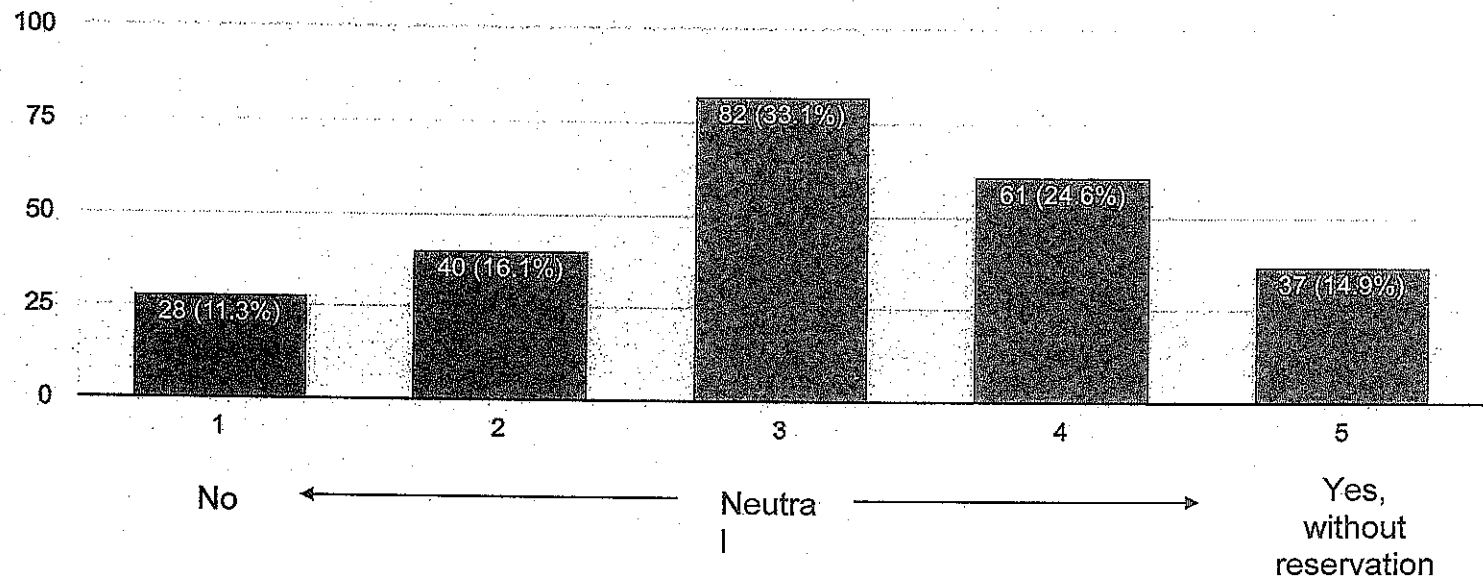
STUDENT DEMOGRAPHICS

- Saugus is among the lowest performing on MCAS in Grade 10 in ELA and math in comparison to districts with similar student demographics
- Saugus is performing lower on the NextGen MCAS in grades 3-8 than the state average
- Targeted Assistance (DESE) identified the “white, male” sub-group as requiring significant improvement

In the eyes of our parents...

Would you recommend Saugus Public Schools to other families of school-age children?

248 responses

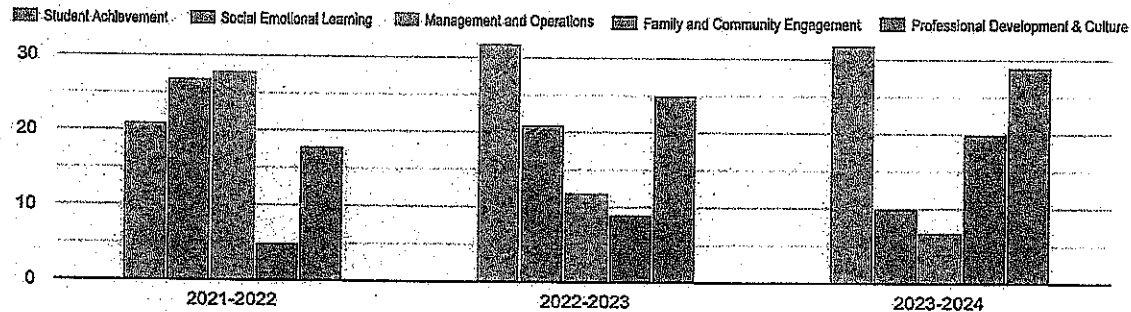
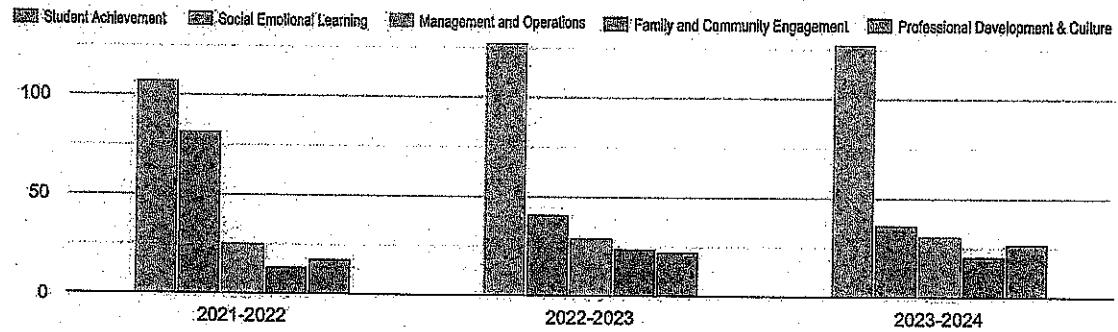


Side by side comparison of 3-year prioritization

Parents & Caregivers >

Teachers >

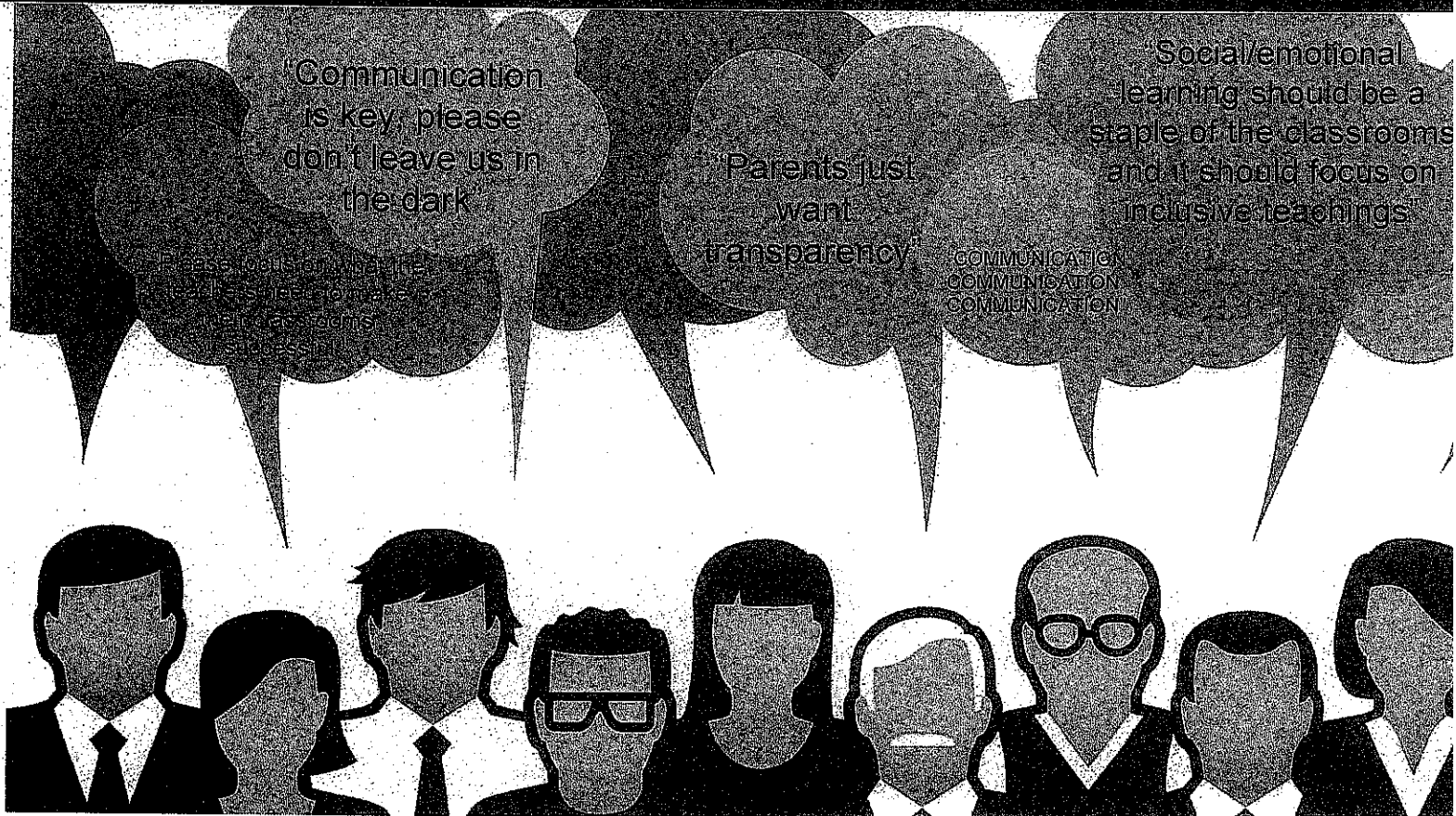
What should the Saugus Public Schools prioritize over the next three years?



What do our parents say they need?

Key Themes

- Communication
- Prioritize social / emotional needs of students
- Student Achievement
- Teacher Evaluation



What I heard motivates our educators

"A life long dream/desire to work with children in an academic setting to help them learn and grow in a safe, loving, respectful environment."
- 2nd-5th grade teacher

"Wanting to make a difference."
- K-1st grade teacher

"A desire to support students emotional well being"

"I wanted to be the teacher that I never had."
- 6th-8th grade teacher

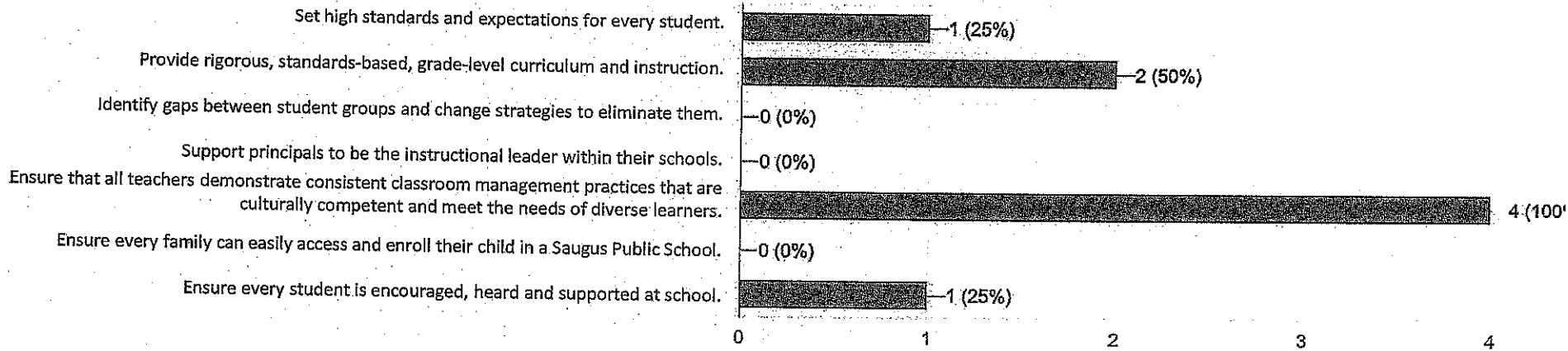
"I am an SHS alumni and wanted to make a difference in my town"



In the eyes of our school's committee members...

STUDENT ACHIEVEMENT:

In service of providing every student with an environment conducive to learning, please choose two of the following goals.

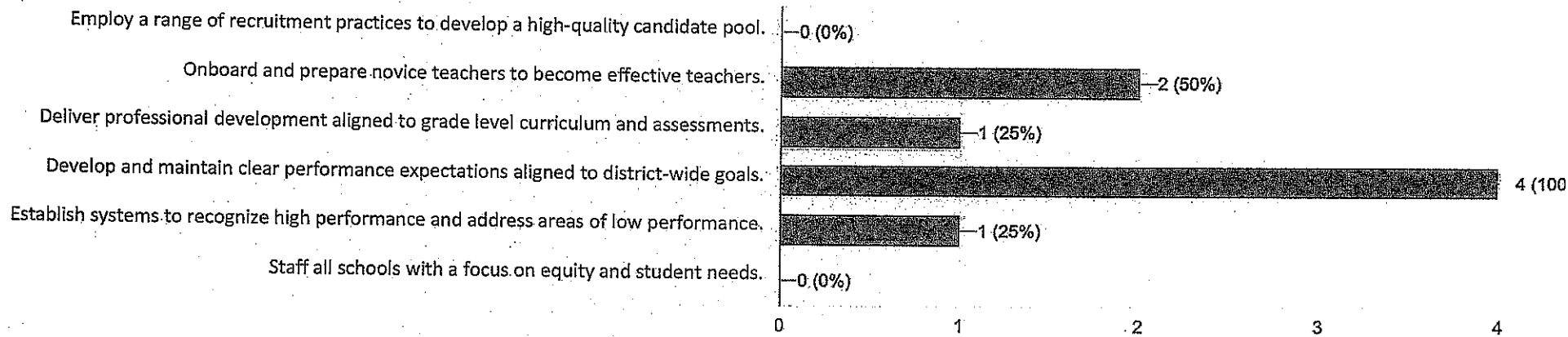


(Source: School System Equity and Excellence Framework)

In the eyes of our school's committee members...

EFFECTIVE INSTRUCTION:

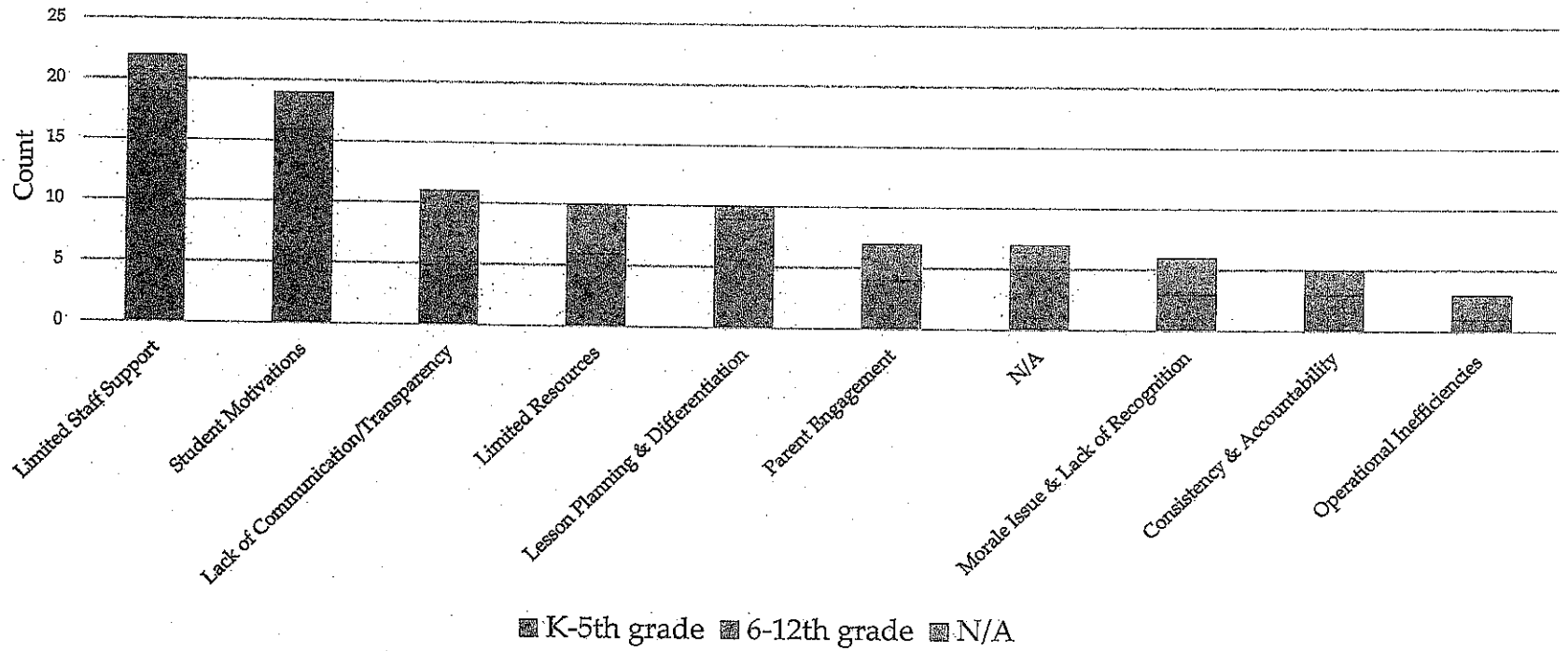
In order to attract, develop and retain exceptional talent, please choose two of the following goals.



(Source: School System Equity and Excellence Framework)

Dig deeper on the
survey data.

What challenges our educators?



Digging deeper, what did educators say?

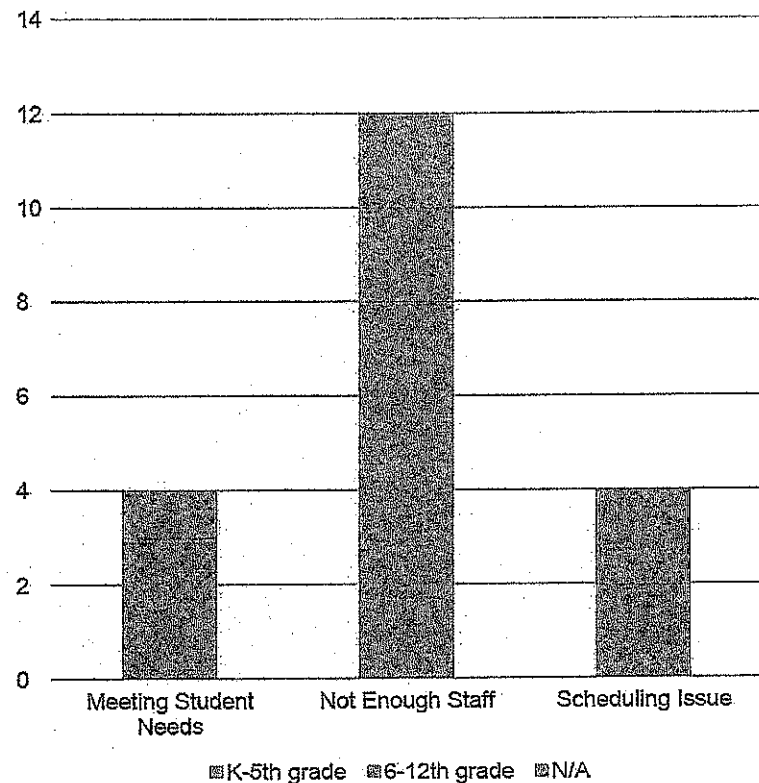
Each of the qualitative responses received were grouped into the following categories:

<i>Category</i>	<i>Example</i>
Limited Staff Support	"I'm currently being pulled in many directions to teach students at various levels"
Limited Resources	"Not being able to obtain appropriate software"
Parent Engagement	"Trying to get parents engaged in student learning"
Operational Inefficiencies	"Schedules often don't account for transitioning from one room to the next"
Student Motivation	"Students not completing work/not attending class regularly"
Consistency & Accountability for students / staff	"As an educator in the school complex: limited enforcement of rules / expectations"
Lesson Planning & Differentiation	"Differentiating instruction - to ensure the content is accessible to all learners"
Lack of Communication/Transparency	"Zero communication and a closed door policy "
Morale Issue & Lack of Recognition	"Not being acknowledged by my system"

Challenge #1 - "Limited Staff Support"

- **Meeting Student Needs:**
varied student levels in one class leaves teachers feeling like they can't fully accommodate to each child. Particular emphasis on ELL and students with IEPs.
- **Not Enough Staff*:**
Low teacher to student ratio in the classroom. Lack of specialized personnel in some cases.
- **Scheduling Issue:**
Teachers are finding it hard to balance paperwork, scheduling, maintaining classrooms on top of teaching.

*Prominent issue in K-5th grade



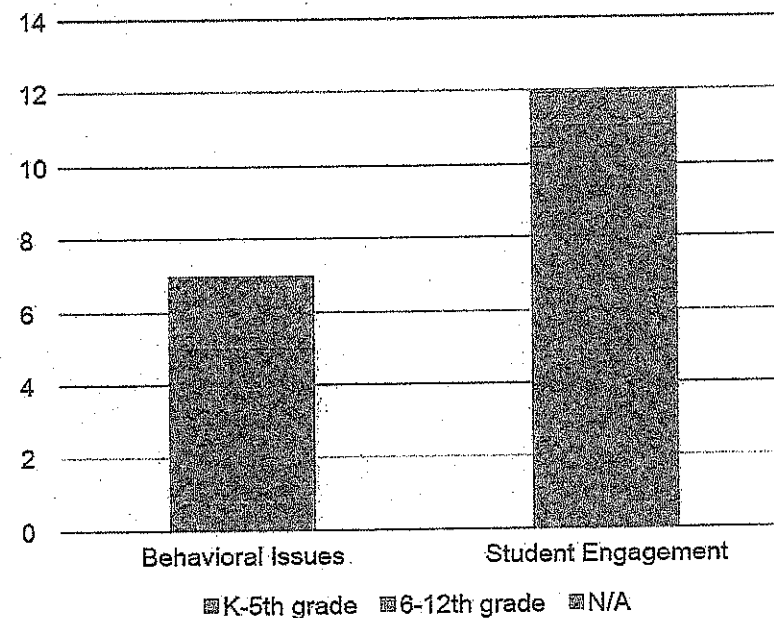
Comparison of regional districts' class sizes show we have similar to smaller student to staff ratios: an average of 20 students per class.

Districts	Enrolled students	K - 2	3 - 5	6 - 8	9 - 12
Saugus	2,607	19.4	21.6	19.9	20.4
Winthrop	1,965	21.4	20.7	22.4	21.8
Danvers	3,417	18.7	21.0	17.9	19.1
Peabody	5,994	20.2	19.2	22.3	20.0
Melrose	3,977	21.4	21.6	22.3	20.1
Lynnfield	2,202	19.9	22.4	20.5	17.7
Revere	7,532	21.2	21.3	22.8	22.1

Challenges #2: Student Motivation

- **Behavioral issues:**
some children are not attending school regularly and disciplinary issues within school.
- **Student engagement*:**
some teachers found motivating students to be difficult; worsened by the pandemic. Teachers noted that students seem uninterested in their subjects.

*Overwhelming representation in 6-12th grade.



Comparing Stakeholder Feedback to Outside Data

Limited Staff Support

- **We have staff, but they may not be in the most needed areas:** While the average class size is 20, there is a staff member for every ten students; the state average is 12.8.
- **We have a relatively experienced workforce:** 5% of our teachers are considered inexperienced, less than the state average.

Factors Impacting Student Engagement

- **Teacher Absenteeism:** 57% of our teachers missed 10 or more days of school, which is considered chronically absent.
- **Need to increase rigor:** We meet the state average for number of AP courses: 12 versus 12.4 but only 24%, or 171 of our high school students is taking at least one AP Course.
- **Student Motivation for College and Career:** 25% of our students are taking the SAT or ACT (177 students)
- **Disproportionate Suspension:** Black students are 2.3 times as likely to be suspended as White students.

Source: <https://projects.propublica.org/miseducation/district/2510500>

Challenges #3 & #4: Communication and Accountability

Communication / Transparency

Teachers:

- "Zero communication and a closed door policy"
- "lack of communication from superiors - not enough meetings nor professional development"
- "Lately it has been the lack of communication and planning at the upper level of administration ... the constant feeling as if we are trying to reinvent the wheel in order to meet the needs both of the state and the students."

Parents:

- "Better communication with families and with staff, it seems like we find out at the same time as them and teachers seem blindsided. As families I feel we don't find things out until last minute. I realize last year was unprecedented and honestly the year before seems like an eternity away but currently that's what I feel is lacking."
- "Give families adequate notice if there are changes in schedules"
- "Being more transparent about things like bus routes and if before/after school care is available"

Consistency and Accountability

Teachers:

- "Enforcing rules, when some teachers ignore them"
- "Lack of supervision"
- "As an educator in the school complex: limited enforcement of rules / expectations for students / staff"

Parents:

- "Saugus Public Schools needs to hold its teachers and administration accountable. Teachers not posting grades in X2 until the final week of a semester, (timeliness), teachers not meeting the required after school help session for students, teachers and administrators not responding to parent and outside tutor emails is just unacceptable. Administration should be running reports weekly in X2 for missing grades. **How does a student/parent/teacher know if the topic discussed was actually understood if grades are posted timely?** This is an issue that has gone on for years at SMS. No accountability."

Moving Forward

Dec - Jan

Cultivate and select team for Strategic Planning.

Plan for the Plan.

Feb-March

Conduct focus groups and surveys to ask and answer key questions.

Begin Planning.

April-May

Refine strategic plan and develop 1-3 goals for the next five years.

Plan.

June-July

Invite feedback from internal and external partners.

Refine the plan.

August

Present refined strategic plan to the School Committee.

Approach to Strategic Planning

- Place the children at the center of our decision making, always.
- Utilize existing data to drive improvement and actively seeking ways to gather more data.
- Invest in the development of our educators to ensure that we are providing top quality instruction.
- Ensure that teaching materials are up to date and accessible to all children regardless of race, ethnicity or socio-economic background.
- Take advantage of every opportunity to innovate so that we can push Saugus Public Schools from the bottom 10% to the top 10%.

Short-Term
Focus
(Next 6 months)

January - June 2022

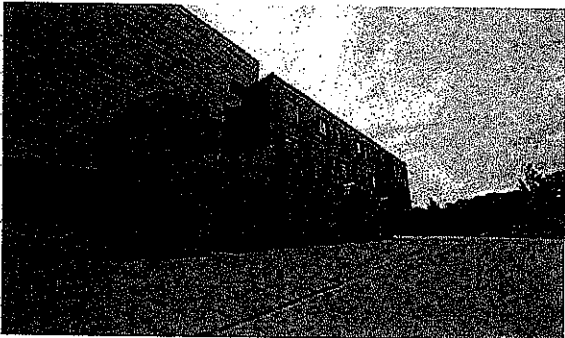
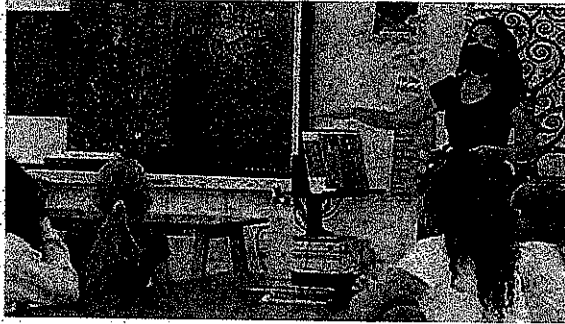
#1: Continue to accelerate out of the pandemic, while developing belonging in our new school communities.

#2: Survey the students to better understand their hopes and dreams. Triangulate that data with other data.

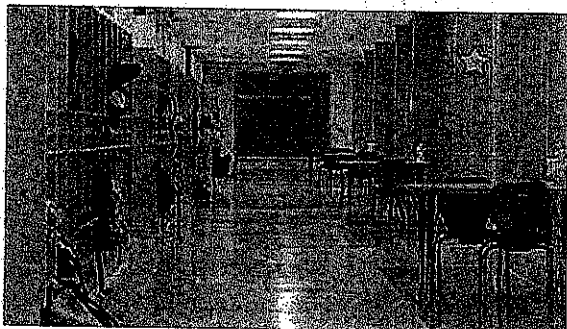
#3: Create a strategic plan for the next five years that takes us to the Top 10.

Vision for Learning Acceleration 2021-2022

Every student in Saugus, regardless of race, ethnicity, culture, gender, identity or home language, will be empowered to compete in an increasingly globalized society. They will thrive by accessing and engaging in grade-appropriate assignments, strong instruction, deep engagement, and teachers with high expectations. Teachers believe all students can achieve at advanced levels, while working to meet the diverse learning needs of all. By creating a sense of belonging through social emotional learning, students will feel welcomed, included, and celebrated at school.



Moving Forward...



1-3 Years

- Continue In-Person Learning
- Address Covid Learning Gaps For All Students
- Provide Physical, Mental Health And Well-Being Supports
- Address Attendance, Engagement, And Student Transitions
- Ensure High-Quality Curriculum & Instruction
- Recruit And Retain Talented Educator Workforce



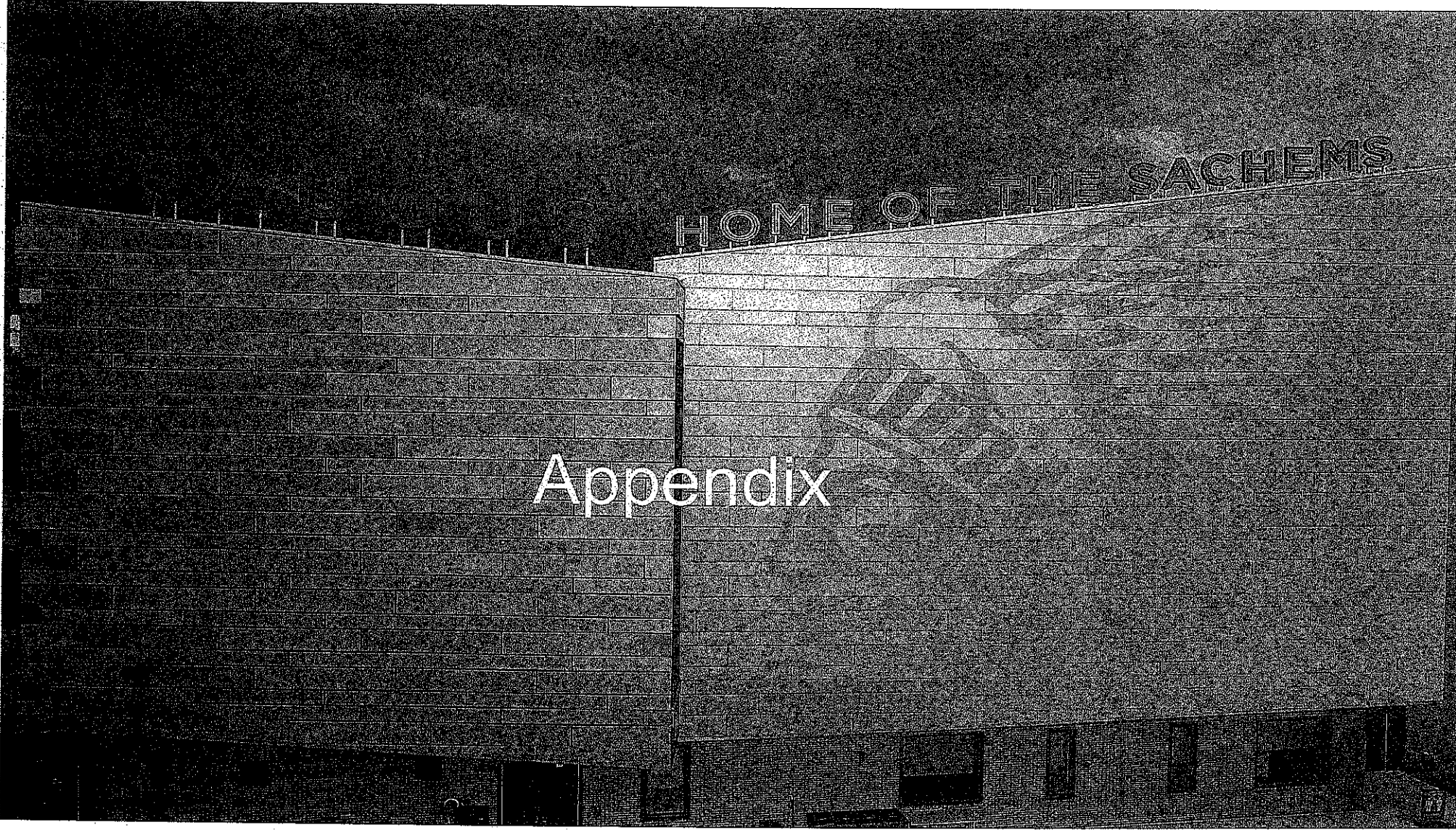
3-5 Years

- Ensure Students Stay On A Path To Postsecondary And Career Readiness
- Create Balanced Assessment & Accountability Systems
- Explore And Implement New Education Delivery Models (e.g. Early College, STEAM)



Source: The Coalition to Advance Student Success





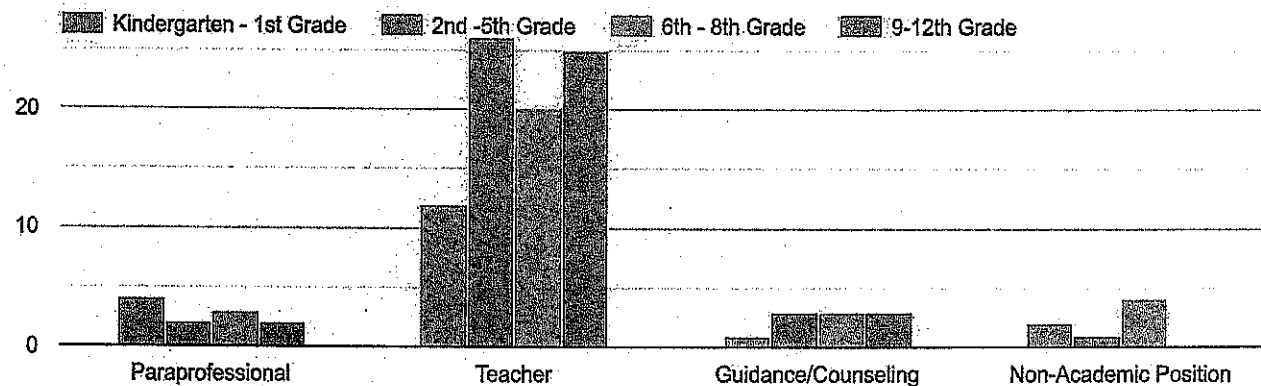
HOME OF THE SACHEMS

Appendix



Educator Feedback Survey

- Sent out online to all educators in Saugus Public Schools with the purpose of gathering qualitative data and insight from our educators
- Survey sent out on June 14th 2021, Responses collected July 1st 2021
- Number of responses: 100, Response rate: 46%
- Questions covered a range of topics including motivations, challenges, start-stop-continue suggestions and more
- Profile of educators that responded:



Parent & Caretaker Feedback Survey

- Sent out online to all parents in Saugus Public Schools with the purpose of gathering qualitative data and insight from our parent and caretakers
- Survey sent out on July 1 2021, Responses collected July 31st 2021
- Number of responses: 253, Response rate: 10%
- Questions covered a range of topics including motivations, challenges, start-stop-continue suggestions and more

Key takeaways:

- 24.8% of parents want to participate in a committee to help **shape communication strategy** in the district
- 31.8% of parents want to participate in a meeting to **discuss funding and budget allocation** for the district
- **79.6% of parents want to be contacted via email**, 13.1% prefer to be contacted via text, 3.7% prefer to be call

School Committee Feedback Survey

- Sent out online to all 5 members of the school committee
- Number of responses: 5*, Response rate: 100%

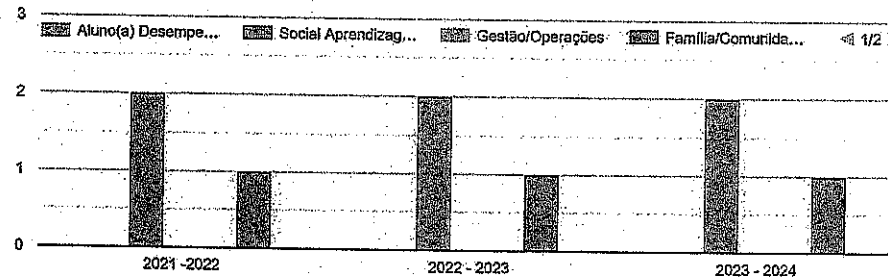
**of the 5 responses, one response was recorded as an oral response*

Key takeaways - Improvements that the team want to see over the next five years include:

- More rigorous teacher evaluations**
- Emphasis on perception of achievement**, in addition to improved student achievement
- Developing a team mentality** that is centered around professional development and student achievement
- Greater emphasis on the arts** both during and after school

Portuguese-speaking parents focus on Social Emotional Learning and Family Engagement

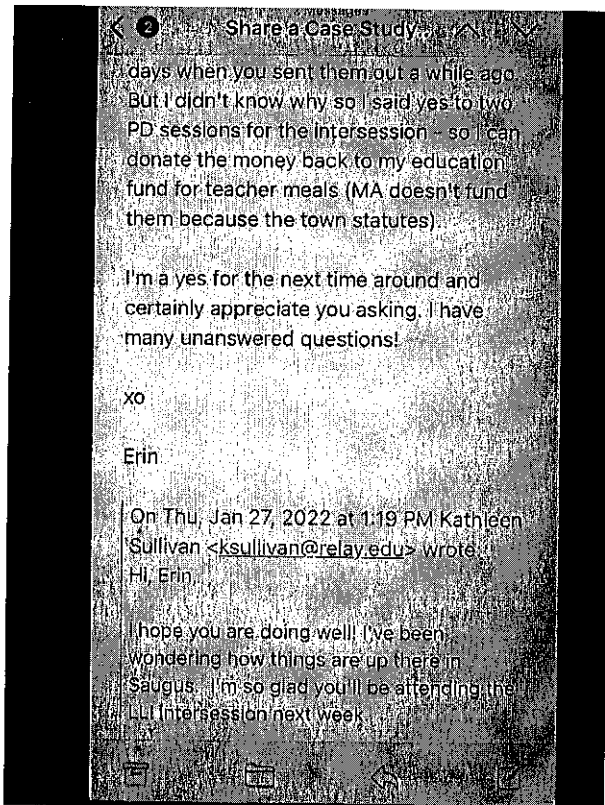
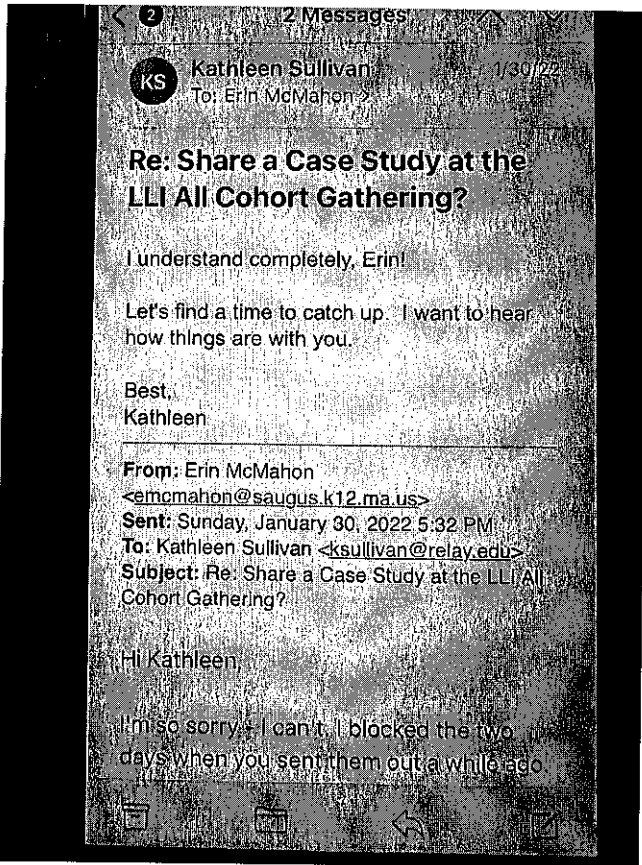
5. Qual deve ser a prioridade das Escolas Públicas de Saugus para os próximos três anos? *
 Marque apenas uma oval por fila

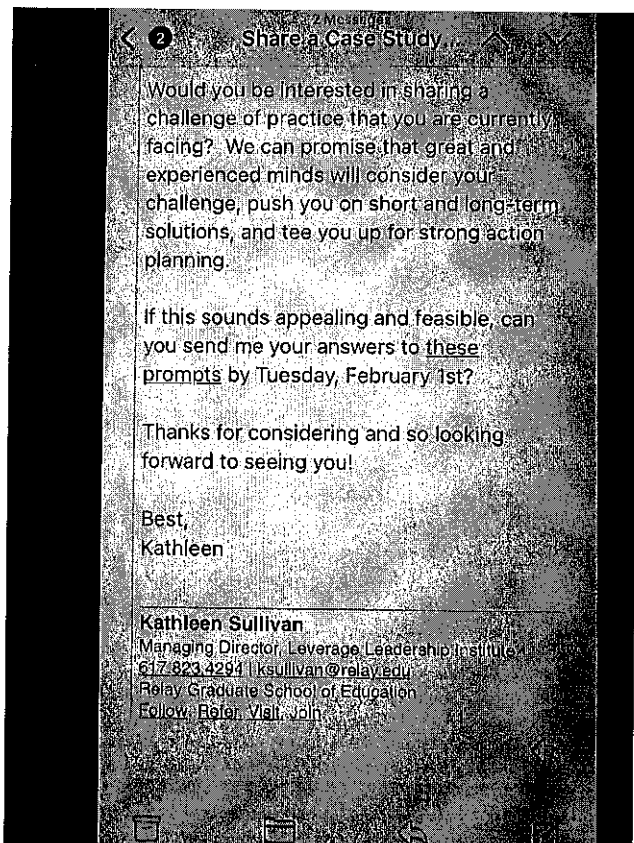
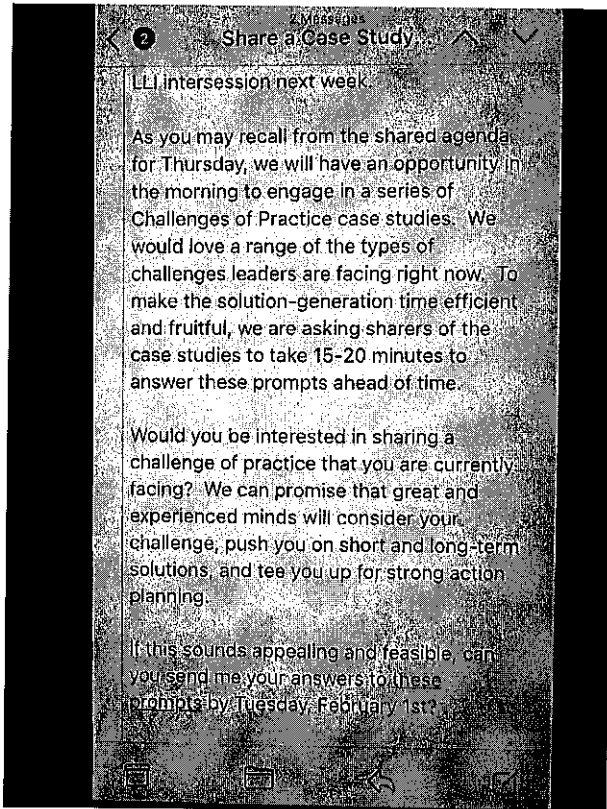


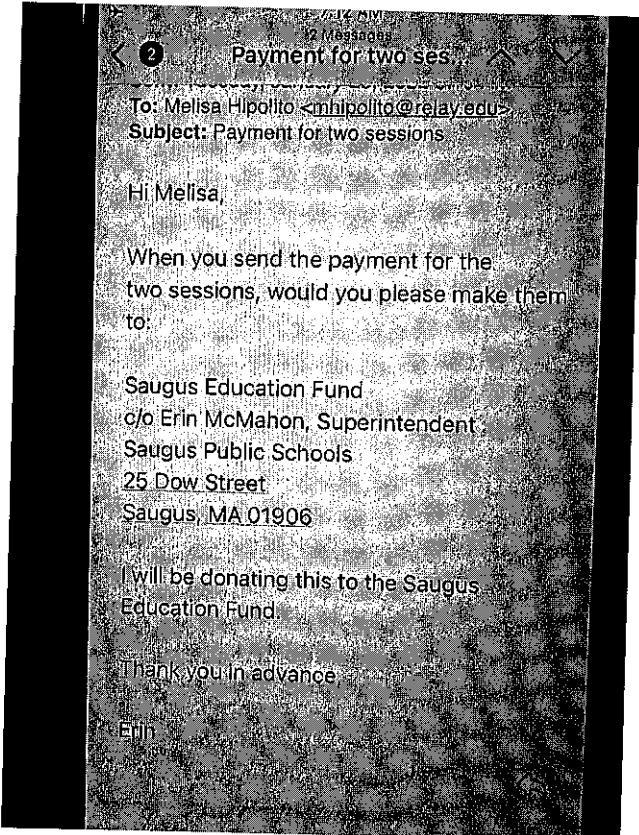
Ajudar nossos alunos a ser pessoas boas e gentis
 Olhar realmente a dificuldade de cada criança
 Seja dedicada e amorosa com todos
 Combater o bullying
 Ensinar com mais recursos
 Continuar dando assistência e atenção as famílias



Helping our students to be good and kind people
 Really look at each child's difficulty
 Be dedicated and loving to everyone
 fight bullying
 Teach with more resources
 Continue giving assistance and attention to families







Payment for two ses.

To: Melisa Hipolito <mhipolito@rejay.edu>
Subject: Payment for two sessions

Hi Melisa,

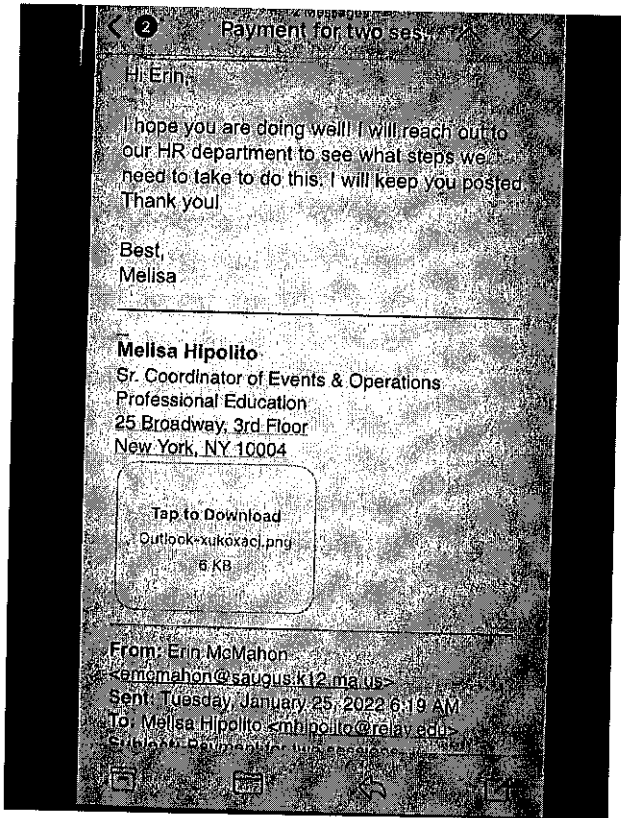
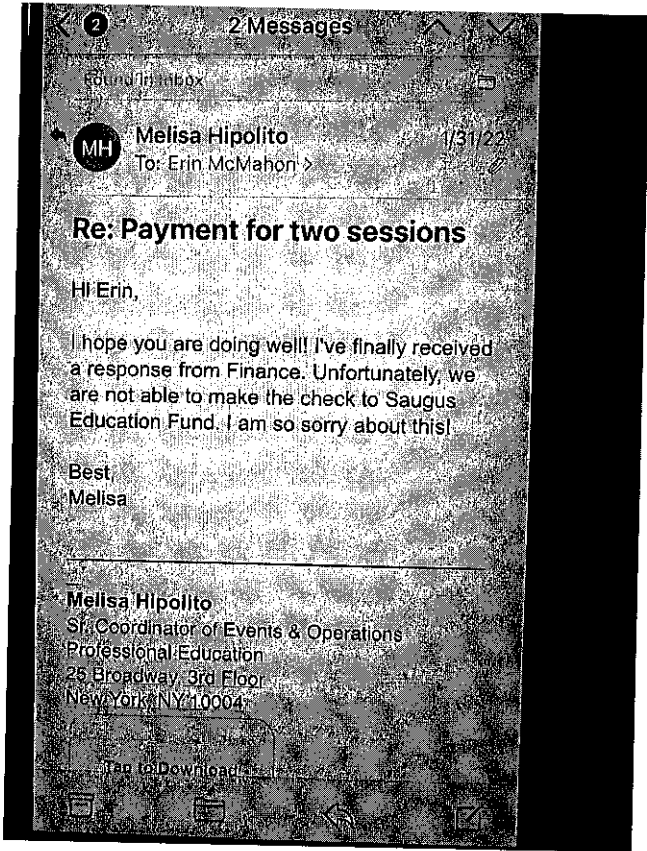
When you send the payment for the two sessions, would you please make them to:

Saugus Education Fund
c/o Erin McMahon, Superintendent
Saugus Public Schools
25 Dow Street
Saugus, MA 01906

I will be donating this to the Saugus Education Fund.

Thank you in advance.

Erin





no-reply@relay.edu

To: Erin McMahon >

Relay Consulting Agreement #11285

Dear Erin McMahon,

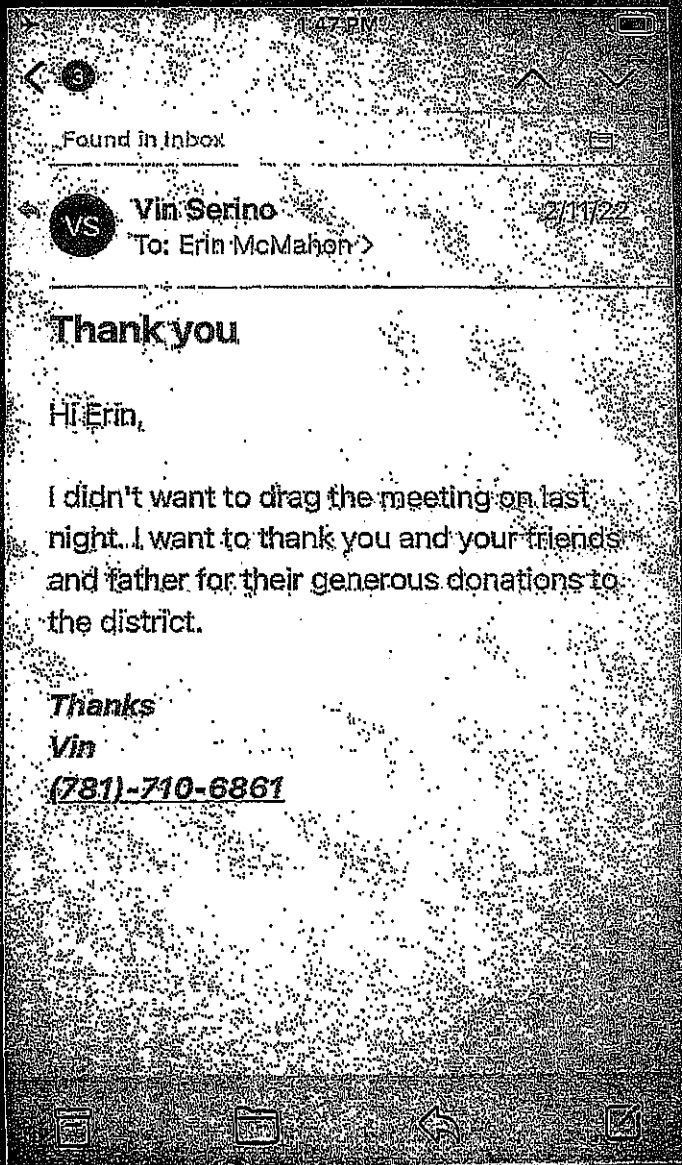
Welcome to the Relay team! We are writing to provide your Relay consulting agreement and hire paperwork in order to be set up for payment.

Paperwork and Next Steps

Attached you will find a copy of your contract and additional hiring paperwork needed for our records. Relay GSE will pay you as an independent contractor (see further details below). Please take the next few days to look over the agreement and let us know if you have any questions before returning the signed agreement. The paperwork includes the:

- **Consulting Agreement:** Please sign and date the contract (in two places) and return all pages of the agreement to HR@Relay.edu.
- Please note we will not process unless we receive all 7 pages.

PS: Email W-9. Please complete...



Found in Inbox



Vin Serino

2/11/22

To: Erin McMahon >

Thank you

Hi Erin,

I didn't want to drag the meeting on last night. I want to thank you and your friends and father for their generous donations to the district.

Thanks

Vin

(781)-710-6861

Contract for Saugus Public Schools
Vendor: Chi Tschang, DBA, Excellence Reflex Consulting

September 8, 2022

Project Summary

Currently, one of the organizational needs is to develop principal manager capacity in analyzing student work and leading weekly data meetings, in support of their participation in the National Principal Supervisors Academy.

Scope of Services

- 9/15/22 - 6 hours of coaching in September focused on developing principal manager capacity. Observe, score and coach on all three meeting protocols (implementation, WDM, coaching on observation/feedback); 2 leaders.
- 30 hours of coaching in October through December focused on coaching weekly data meetings. Includes leading PD (in person), site visits (in person) and remote coaching. Observe MS/HS teams (multiple data meetings), plan for feedback to leaders, batch feedback. Observations of multiple schools. In the afternoon, observe ES teams, plan for feedback to leaders and batch feedback. When: 10/5 or 10/26, 11/2, 11/16

Consulting Fees

- The fee would be \$300 per hour (not including travel costs). The estimated cost for the above project would be \$9,999.

Saugus Public Schools agrees to pay invoices once each event is complete. As an independent contractor, Mr. Tschang is responsible for reporting all income received to taxing authorities.

Agreement signified by signatures:



Erin McMahon, Superintendent
Saugus Public Schools, MA

Chi Tschang, President
Excellence Reflex Consulting

Chi Tschang
639 4th Ave. #7A
Brooklyn, NY 11232
917-280-4517

Date: 10/5/22

To: Erin McMahon, Saugus Public Schools

Proposal for Bid - Excellence Reflex Consulting

Project Outline and Proposed Approach

The goal of this proposal is to coach the Superintendent and Principal Managers on implementing Weekly Planning Meetings and Weekly Data Meetings at excellence across Saugus Public Schools. This includes the following:

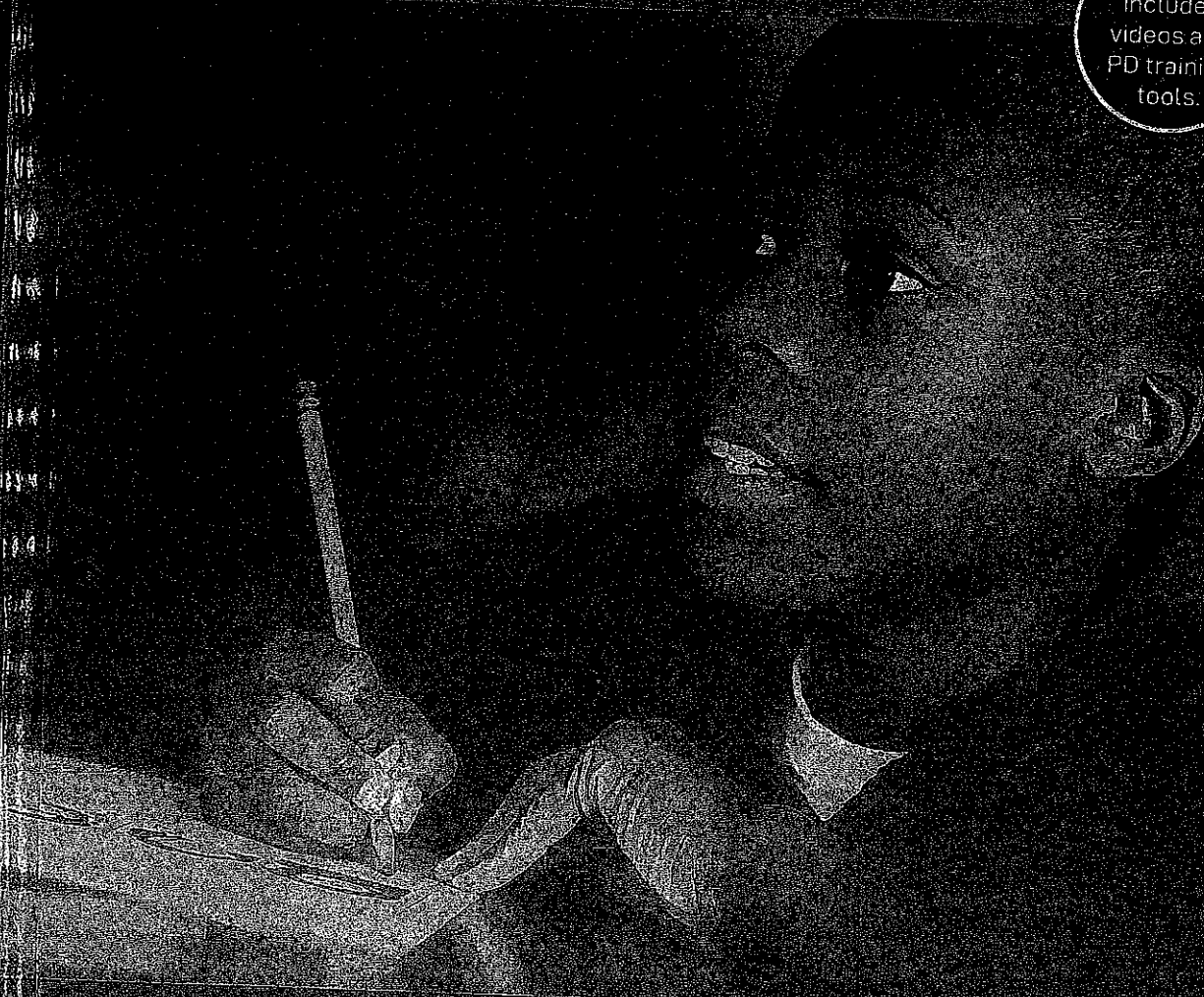
- 1) Plan and lead two in-person PD sessions on lesson internalization and leading planning meetings for all data team leads and principals (10/21). The session will have the following objectives:
 - To model the process for intellectually preparing for a lesson
 - To prepare for a planning meeting by intellectually preparing for a lesson
 - To model leading a planning meeting
 - To practice closing teacher content gaps by leading a planning meeting.
- 2) Participate in a site visit to observe Weekly Data Meetings and Weekly Planning Meetings, prepare for batch feedback (including identifying the highest-leverage gaps / action steps) and prepare to close the gap by planning an upcoming PD (11/2)
- 3) Plan and lead two in-person PD sessions on leading Weekly Data / Planning meetings for all data team leads and principals (11/16). The objectives are TBD and will depend on the gaps identified on 11/2.

Projected Costs

- The cost of the full day of PD leadership on 10/21 is \$3,500 (plus all approved travel expenses).
- The cost of the full day of PD leadership on 11/16 will be \$5,000 (plus all approved travel expenses). This increased cost is due to the increase planning work that would be required for that PD session.
- For the site visits, the consulting fees are \$300 per hour (plus all approved travel expenses).

FOR EVOLVED LEARNING
Paul Bambrick-Santoyo

Book
includes
videos and
PD training
tools.



DRIVEN BY DATA 2.0

A Practical Guide to Improve Instruction

Uncommon
Schools

Change History

JOSSEY-BASS
A Wiley Brand

PUT STUDENT LEARNING FIRST

Since the publication of *Driven by Data* in 2010, educators from schools across the world have adopted the foundational practices of data-driven instruction to make dramatic gains in student achievement. They have done so by focusing on two simple but powerful questions:

- How do we know if our students are learning?
- And when they're not, what do we do about it?

The results of this approach are clearly highlighted in the book via multiple success stories from schools who have overcome the most challenging obstacles. When properly leveraged, data-driven instruction increases academic proficiency and helps students succeed on the road to college.

Driven by Data 2.0 presents a proven framework that shows how to:

- Assess (set the roadmap for learning)
- Analyze (identify why students struggle)
- Act (teach more effectively what students need)
- Build the Culture (train and develop your staff so that data-driven instruction can thrive)

"This book superbly describes the change process that leaders can go through with their faculty in order to make data-driven instruction a reality in their schools. You'll also find the rationale and all of the structures for data analysis, scripts of how to analyze student thinking and come up with appropriate re-teaching strategies for weak areas, and precise guidance on how to run effective data meetings. This is the whole package."

—ADOM SAPRIZ, founder and president, Research for Better Teaching, and chairman emeritus of Teachers 21



PAUL BAMBRICK-SANTOYO is the Chief Schools Officer for Uncommon Schools and the Founder and Dean of the Leverage Leadership Institute. Over the last 15 years, Bambrick-Santoyo has personally led some of the highest achieving urban schools in the country while also training over 20,000 leaders worldwide in the best practices of instructional leadership. He is the author of *Leverage Leadership 2.0*, *A Principal Manager's Guide to Leverage Leadership 2.0*, *Get Better Faster*, and *Great Habits, Great Readers* from Jossey-Bass.

Cover Design: Wiley
Cover Image: Courtesy of Uncommon Schools

Also available
as an e-book

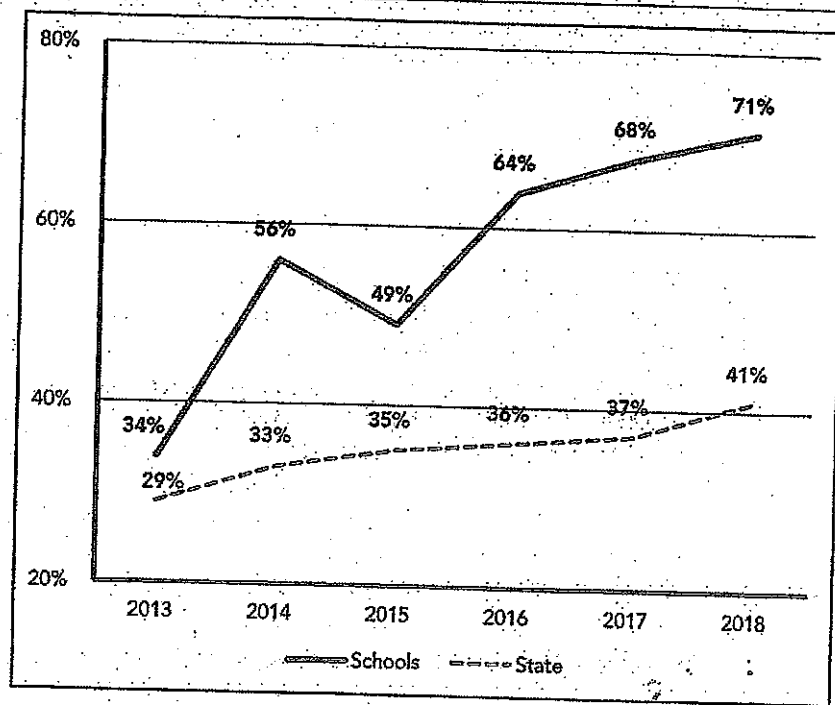
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Uncommon
Schools | Change History

Education/Administration/General
\$36.95 USA/\$43.95 CAN/£27.99 UK



Figure 4.2 New York State Exam: Achievement First Middle Schools, Math Percentage at or Above Proficiency



The Story

When the state of New York raised the bar of their state tests in 2012, student achievement plummeted, especially at schools with high percentages of students who qualified for free/reduced lunches, like Achievement First East New York and Apollo middle schools. Like most schools across the state, they struggled to teach students to a higher bar. Chi Tschang, the regional superintendent, knew he had to make a change. "The more I immersed myself in the failure of our schools, the more I realized that the lessons we were offering to students simply weren't rigorous enough. We had to start over from scratch."

He started by giving a focus to each quarter of the year. The first quarter was devoted to student culture—laying the groundwork for learning to occur. The second quarter, with the results of the first interim assessment in hand, turned to the launch of weekly data meetings and a focus on aggressive monitoring (monitoring student work during class and coaching students during independent practice to improve). "I found that when we focused on one thing at a time," Chi recalled, "it brought a clarity to the work. With so much on a principal's plate, having a singular purpose made the daily life easier to manage." The third quarter shifted to leading discourse with students that responded to student learning needs, and the fourth quarter put it all together in what Chi calls "Crescendo." Having this yearly calendar set in place dramatically changed the quality of what principals were doing each day to drive student learning.

Particularly in the second quarter, the school leaders shifted from asking teachers to fill out data analysis plans and plan re-teaching on their own to diving into weekly data meetings. The school leadership teams met to plan the weekly data meetings for every grade, focused on the key standards that would unlock the learning for the week. Before the start of the 2nd and 3rd quarters Chi led a "Triathlon" where every instructional leader had to practice leading data meetings and observation and feedback meetings to perfect their skill.

The result: consistent, remarkable gains in achievement over a five-year period that made them the highest gaining schools and among the highest-achieving schools in all of New York. When praised about his success, Chi was quick to credit others. "I didn't figure this out on my own. I learned from others who had implemented *Driven by Data* and *Leverage Leadership*. I thank them for their impact on us."

Key Drivers from Implementation Rubric

- *Active leadership team*: facilitate teacher-leader meetings looking at student work (interim assessment analysis and weekly data) and monitor the follow-up.
- *Implementation calendar*: begin school year with a detailed calendar that includes time for assessment creation/adaptation, interim assessment analysis, weekly data meetings, and re-teaching (*flexible* enough to accommodate district mandates/changes).
- *Ongoing professional development*: PD calendar is aligned with data-driven instructional plan: includes student work analysis, action planning and learning how to teach content.
- *Build by borrowing*: Identify and implement best practices from high-achieving teachers and schools: visit schools/classrooms, share and disseminate resources/strategies.

Building Buy-in

Earlier in this book, we rejected the notion that initial faculty buy-in was required before starting to implement data-driven instruction. (One could potentially argue that any initiative that requires complete buy-in prior to implementation will likely fail.) The best initiatives in schools—and elsewhere—do not require buy-in; they create it. In fact, the Camden County, Georgia School District published a very persuasive article about the phases of data-driven instruction. It illustrated how teachers in their district moved from Stage 1 to Stage 5:

- **Phase 1 Confusion and overload**: "This is too much!"
- **Phase 2 Feeling inadequate and distrustful**: "How can two questions on a test possibly establish mastery of an objective? These questions are terrible!"
- **Phase 3 Challenging the test**: "That is a poor question. Answer 'B' is a trick answer."

Budget Regular Check-in
2022-2023 School Year
2023 Grant Playbook

January 9, 2023

Attendees: Kathy, Dawn, Margo, Susan, Pola, Erin

Balances

- No change to the balances.

Follow-up

- Pola will develop a template for the consultants to model their invoices

New Business

- Reporting to the Treasurer and accounting for the use of the credit card
- Expense reports on Pola's desk

Close and Next Steps

- Pola will develop a template for the consultants to model their invoices
-

January 3, 2023

Attendees: Kathy, Dawn, Margo, Susan, Pola, Erin

Balances:

- Finish PD line out of ESSER II for strategic planning; 3K allowed for January

New Business

- Climate and Culture Lead - Title 1 2022 - J. Newell, MS Dean (prorate the \$3433; Team Lead at each school)
- Title 1 - expenditure for consultant for 21st Century Learning Grant; Susan will ask for it; ESSER III
- ESSER II - \$8954 for medical therapies; to be spent soon
- ESSER III currently has one teacher - SS at High School
- We are working on the grant procedure in our new procedural drive (draft)

Close and Next Steps

- Pola will develop a template for the consultants to model their invoices

**Budget Regular Check-in
2022-2023 School Year**

■ 2023 Grant Playbook

December 12, 2022

Attendees: Kathy, Dawn, Margo, Susan, Pola

Balances:

ESSER II

- (1) Overages fixed from last week
- (2) \$5700 left from ESSER II
 - (a) Contract received for Heidi Guarino; revised to \$22K total
- (3) Medical therapeutics: \$9K

ESSER III

1. Instructional supplies encumbered for Great Minds and Wilson
 - a. Next step: Kathy will ask Donna why Primary Source has not yet been made
2. Move Social Studies teacher to ESSER III (R. Justin)
3. Move Curriculum Coaches back to the LEA next year
4. Communications PT Manager is being paid out of ESSER III, not Grant Bookkeeper

SEL Grant submitted to the Town; will post positions at the end of the week

335 - Safe and Supportive (10K)

1. Community Health Liaisons posting

Batches are approved on Tuesdays.

- It takes 2-3 weeks to pay the invoices.
- School Committee must sign the bills faster.

ECLC Grant - can be used for Superintendent's Fund: (1) PD (2) support of teachers/staff (3) vision - 11/23/22 (Jane Feinberg)

December 5, 2022

Attendees: Kathy, Dawn, Margo, Susan, Pola

- Balances - overages in ESSER II (M. Dwyer, J. Lefferts, A. Shoemaker)
 - MD - to ESSER III: JL to ESSER III; AS - to Title I
 - ESSER II:

**Budget Regular Check-in
2022-2023 School Year**

2023 Grant Playbook

- \$8954 in medical therapeutics
- Pay for Strategic Planning/EdLabs - paid \$4465. All out of ESSER II. *GM*
 - First two paid out of ESSER II.
 - Outstanding invoice: \$2470.
 - If capped \$20K, remaining \$13,065 - \$2470.
- ESSER III *with letters*
 - With Great Minds bills, \$5650.
 - Need PO for them to come on 12/14 for PD
- Contractual Service Line - 2 bills that are being processed for Great Minds

Housekeeping

- Grant Amendments: avoid 20th of the month to the end of the month
- Payroll in grants are rounded up; Pola is checking before she moves it
- New grants: Pola will set up a fund through the town; then org/object. (takes a week)
- For amendments: need approval email and amendment to the budget

Next Steps

- Check will be at least three weeks before it is issued. (Mark; LEA); (Chi, grant)
- Running total will only be added once paid so that it matches.

November 28, 2022

Attendees: Dawn, Erin, Kathy, Susan, Margo

- No balance updates since last meeting.
- Clearing out CIVICS grant - \$7300 plus \$5000 in ESSER - MS Social Studies
- Amendment to Title 1: for salary change
- Amendment to Title III: for Family Resource Center; promotional materials

Nov 21, 2022

Attendees: Dawn, Erin, Kathleen, Susan, Pola, Jen

**Budget Regular Check-in
2022-2023 School Year**

2023 Grant Playbook

Notes

New Business

- Transportation
 - \$100K/monthly cost of special education transportation (\$1M/school year)
 - Out of 240 money by end of January; budgeted for half
 - Potentially making up the difference through LEA budget from leaves

Follow-up

- Reconciliations
 - Summer School 2022 for MS:
 - Confirming almost \$15K for Saturday School. **Moving to Title 1. Instead, moving to Early College Grant (amended 11/28/22)**
- ESSER III
 - Arts - after schools use their lines**

Next Steps

- Dawn will follow up with Pola on payment for transportation
- Kathy will keep track of the Saturday School timesheets
 - Kathy will keep a running total of the timesheet/run rate
- Erin to Adriane; stipend positions need to be approved with a letter; sent to Kim
- Susan - yes, but you use your school lines first
- Erin - Rebecca - coaching on how to use supply funds before PTO

Nov 14, 2022 | 2023 ESSER Regular Check-in

Attendees: Dawn Trainor Erin McMahon Kathleen Maffeo Pola Andrews Susan Terban
~~Margo Ferrick~~

Notes

- Kathy: grant balances
- Susan: original grant, allowable uses,
- Pola: reconciliation, monthly draw
- Erin: stabilization fund document
- Margo: Playbook for grants
- Dawn: changes/updates - staffing or ODP

Action Items

- Susan - no changes in ESSER 3 since last week
- Pola - we are planning to move 1 K teacher and 1 K para (final ones) out of ESSER 3 to the LEA; 1 to revolving. Moving Aurelio to Revolving. Moving remaining para Belabo to revolving. This frees up \$400K invest in High Quality Instructional Materials.

Budget Regular Check-in

2022-2023 School Year

2023 Grant Playbook

Reconciliations

Summer School 2022 for MS:

Moved \$372 from FY 22 TAG; almost 10K for Summer School, **Moving to Title 1.**

Curriculum materials to ESSER III

Teacher/para - charged to revolving first.

Credits to ESSER for amounts charged for teachers moving to All Day K

There is a negative amount.

By January 1, of what is in teacher line.

Reminder:

Communications Manager is in ESSER III.

Grant Bookkeeper is in the LEA budget.

Increased pay for Ambar - Susan/Margo - what is in the offset -

This content is from the eCFR and is authoritative but unofficial.

Displaying title 2, up to date as of 8/02/2022. Title 2 was last amended 5/19/2022.

Title 2 - Grants and Agreements
Subtitle A - Office of Management and Budget Guidance for Grants and Agreements
Chapter II - Office of Management and Budget Guidance
Part 200 - Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards
Subpart D - Post Federal Award Requirements
Procurement Standards

§ 200.320 Methods of procurement to be followed.

The non-Federal entity must have and use documented procurement procedures, consistent with the standards of this section and §§ 200.317, 200.318, and 200.319 for any of the following methods of procurement used for the acquisition of property or services required under a Federal award or sub-award.

(a) **Informal procurement methods.** When the value of the procurement for property or services under a Federal award does not exceed the *simplified acquisition threshold (SAT)*, as defined in § 200.1, or a lower threshold established by a non-Federal entity, formal procurement methods are not required. The non-Federal entity may use informal procurement methods to expedite the completion of its transactions and minimize the associated administrative burden and cost. The informal methods used for procurement of property or services at or below the SAT include:

(1) **Micro-purchases**

(i) **Distribution.** The acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold (See the definition of *micro-purchase* in § 200.1). To the maximum extent practicable, the non-Federal entity should distribute micro-purchases equitably among qualified suppliers.

(ii) **Micro-purchase awards.** Micro-purchases may be awarded without soliciting competitive price or rate quotations if the non-Federal entity considers the price to be reasonable based on research, experience, purchase history or other information and documents it files accordingly. Purchase cards can be used for micro-purchases if procedures are documented and approved by the non-Federal entity.

(iii) **Micro-purchase thresholds.** The non-Federal entity is responsible for determining and documenting an appropriate micro-purchase threshold based on internal controls, an evaluation of risk, and its documented procurement procedures. The micro-purchase threshold used by the non-Federal entity must be authorized or not prohibited under State, local, or tribal laws or regulations. Non-Federal entities may establish a threshold higher than the Federal threshold established in the Federal Acquisition Regulations (FAR) in accordance with paragraphs (a)(1)(iv) and (v) of this section.

(iv) **Non-Federal entity increase to the micro-purchase threshold up to \$50,000.** Non-Federal entities may establish a threshold higher than the micro-purchase threshold identified in the FAR in accordance with the requirements of this section. The non-Federal entity may self-certify a threshold up to \$50,000 on an annual basis and must maintain documentation to be made available to the Federal awarding agency and auditors in accordance with § 200.334. The self-certification must include a justification, clear identification of the threshold, and supporting documentation of any of the following:

(A) A qualification as a low-risk auditee, in accordance with the criteria in § 200.520 for the most recent audit;

(B) An annual internal institutional risk assessment to identify, mitigate, and manage financial risks; or,



(C) For public institutions, a higher threshold consistent with State law.

PROF DEV IS EXEMPT FROM CH 30 B 50 HIGHER THRESHOLD IS APPLICABLE

(v) **Non-Federal entity increase to the micro-purchase threshold over \$50,000.** Micro-purchase thresholds higher than \$50,000 must be approved by the cognizant agency for indirect costs. The non-Federal entity must submit a request with the requirements included in paragraph (a)(1)(iv) of this section. The increased threshold is valid until there is a change in status in which the justification was approved.

(2) **Small purchases**

(i) **Small purchase procedures.** The acquisition of property or services, the aggregate dollar amount of which is higher than the micro-purchase threshold but does not exceed the simplified acquisition threshold. If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources as determined appropriate by the non-Federal entity.

(ii) **Simplified acquisition thresholds.** The non-Federal entity is responsible for determining an appropriate simplified acquisition threshold based on internal controls, an evaluation of risk and its documented procurement procedures which must not exceed the threshold established in the FAR. When applicable, a lower simplified acquisition threshold used by the non-Federal entity must be authorized or not prohibited under State, local, or tribal laws or regulations.

- (b) **Formal procurement methods.** When the value of the procurement for property or services under a Federal financial assistance award exceeds the SAT, or a lower threshold established by a non-Federal entity, formal procurement methods are required. Formal procurement methods require following documented procedures. Formal procurement methods also require public advertising unless a non-competitive procurement can be used in accordance with § 200.319 or paragraph (c) of this section. The following formal methods of procurement are used for procurement of property or services above the simplified acquisition threshold or a value below the simplified acquisition threshold the non-Federal entity determines to be appropriate:
- (1) **Sealed bids.** A procurement method in which bids are publicly solicited and a firm fixed-price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. The sealed bids method is the preferred method for procuring construction, if the conditions.
 - (i) In order for sealed bidding to be feasible, the following conditions should be present:
 - (A) A complete, adequate, and realistic specification or purchase description is available;
 - (B) Two or more responsible bidders are willing and able to compete effectively for the business; and
 - (C) The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.
 - (ii) If sealed bids are used, the following requirements apply:
 - (A) Bids must be solicited from an adequate number of qualified sources, providing them sufficient response time prior to the date set for opening the bids, for local, and tribal governments, the invitation for bids must be publicly advertised;
 - (B) The invitation for bids, which will include any specifications and pertinent attachments, must define the items or services in order for the bidder to properly respond;
 - (C) All bids will be opened at the time and place prescribed in the invitation for bids, and for local and tribal governments, the bids must be opened publicly;
 - (D) A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation cost, and life cycle costs must be considered in determining which bid is lowest. Payment discounts will only be used to determine the low bid when prior experience indicates that such discounts are usually taken advantage of; and
 - (E) Any or all bids may be rejected if there is a sound documented reason.
 - (2) **Proposals.** A procurement method in which either a fixed price or cost-reimbursement type contract is awarded. Proposals are generally used when conditions are not appropriate for the use of sealed bids. They are awarded in accordance with the following requirements:
 - (i) Requests for proposals must be publicized and identify all evaluation factors and their relative importance. Proposals must be solicited from an adequate number of qualified offerors. Any response to publicized requests for proposals must be considered to the maximum extent practical;
 - (ii) The non-Federal entity must have a written method for conducting technical evaluations of the proposals received and making selections;
 - (iii) Contracts must be awarded to the responsible offeror whose proposal is most advantageous to the non-Federal entity, with price and other factors considered; and
 - (iv) The non-Federal entity may use competitive proposal procedures for qualifications-based procurement of architectural/engineering (A/E) professional services whereby offeror's qualifications are evaluated and the most qualified offeror is selected, subject to negotiation of fair and reasonable compensation. The method, where price is not used as a selection factor, can only be used in procurement of A/E professional services. It cannot be used to purchase other types of services through A/E firms that are a potential source to perform the proposed effort.
- (c) **Noncompetitive procurement.** There are specific circumstances in which noncompetitive procurement can be used. Noncompetitive procurement can only be awarded if one or more of the following circumstances apply:
- (1) The acquisition of property or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold (see paragraph (a)(1) of this section);
 - (2) The item is available only from a single source;
 - (3) The public exigency or emergency for the requirement will not permit a delay resulting from publicizing a competitive solicitation;
 - (4) The Federal awarding agency or pass-through entity expressly authorizes a noncompetitive procurement in response to a written request from the non-Federal entity; or
 - (5) After solicitation of a number of sources, competition is determined inadequate.

Priorities of Title I:

1. Strengthen the core program in schools and provide academic and/or academically-related support services to low-achieving students at the preschool, elementary, middle, and high school levels;
2. Provide evidence-based programs that enable participating students to achieve the learning standards of the state curriculum frameworks;
3. Elevate the quality of instruction by providing eligible staff with substantial opportunities for professional development; and
4. Involve parents/guardians of participating public and private school children as active partners in their children's education at school through open, meaningful communication, training, and, as appropriate, inclusion in decision-making processes.
5. Support key district and school improvement initiatives **in coordination with** other federal grant funds and state and local resources so initiatives and their impact **are sustained** beyond the life of individual sources of funding.

Types of Title I Programs:

Title I Targeted Assistance Program (TA) – Funds may be spent on allowable Title I activities for participating, targeted Title I students, their teachers, and families only in targeted assistance schools.

Title I Schoolwide Program (SW) – Funds may be spent on allowable Title I activities for any students, teachers, and families of students enrolled in the school.

Categories	Allowable Costs*	Unallowable Costs
1. Administrator Salaries	<ul style="list-style-type: none"> • Program Administrator/Grant Manager/Professional Development Coordinator – only the portion of the salary dedicated to Title I, Part A support • McKinney-Vento Homeless Liaison 	<ul style="list-style-type: none"> • Entire salary unless the manager's entire responsibility is Title I, Part A • Administration costs should not exceed 10% of allocation without approved justification.
2. Instructional/ Professional Staff	<ul style="list-style-type: none"> • Title I Teacher salaries • Academic/Instructional coaches • Counselors/behavior support positions • Family and Community Engagement Coordinator • Differential and incentive pay for educators in high-need academic subject areas and specialty areas 	<ul style="list-style-type: none"> • Entire salary unless the individual's entire responsibility is Title I, Part A • Time and work in non-Title I schools or with non-Title I students
3. Support Staff Salaries	<ul style="list-style-type: none"> • Title I instructional paraprofessionals • Family and Community Engagement Liaisons • Bookkeeper for Title I, Part A grant work – only the portion of salary dedicated to Title I, Part A support 	<ul style="list-style-type: none"> • Entire salary unless the individual's entire responsibility is Title I, Part A • Time and work in non-Title I schools or with non-Title I students
4. Stipends	<ul style="list-style-type: none"> • Title I, Part A program administration • Extended day/week/year instruction • Professional development • Data analysis and improvement planning activities • Parent and community engagement activities and their costs (including janitorial services) 	<ul style="list-style-type: none"> • Stipends for time and/or activities that are already compensated as part of regular contractual duties
5. Fringe Benefits	<ul style="list-style-type: none"> • MTRS (9% of salaries budgeted for staff who pay into MTRS) • Local retirement systems • Other fringe benefits such as health insurance 	<ul style="list-style-type: none"> • Volunteer contribution accounts such as 401k and 403b
6. Contractual Services	<ul style="list-style-type: none"> • Contracted instructors that meet state certification requirements (including for equitable services in participating private schools) • Professional development providers • Consultants to upgrade curriculum, instruction, and student supports (instructional and behavioral) • Third-party providers of Title I supports and initiatives (including software licenses) • Dual or concurrent enrollment programs • Substitutes for teachers attending Title I, Part A funded professional development opportunities • Presenters for family engagement offerings • Grant administration activities (including translation) 	<ul style="list-style-type: none"> • Substitutes for teachers not attending Title I, Part A funded PD • Training in the use of a dangerous weapon

Categories	Allowable Costs*	Unallowable Costs
7. Supplies and Materials	<ul style="list-style-type: none"> Supplies and materials needed to carry out Title I activities Academic assessments to gauge impact of Title I initiatives Computers and software for use by Title I students Materials and refreshments for Title I parent engagement activities/meetings Supplies for students experiencing homelessness Office supplies for administration of the grant 	<ul style="list-style-type: none"> Supplies and materials for non-Title I schools and students (including screening assessments for students who are not yet Title I participants) Alcohol, gifts, awards, fundraising costs, gift cards, dangerous weapons Supplies costs should not exceed 10% of allocation without approved justification.
8. Travel (Conference & Course Registration)	<ul style="list-style-type: none"> Professional development registration and travel costs for administrators and staff engaged in Title I activities Course reimbursement to advance Title I initiatives Travel associated with provision of Title I services 	<ul style="list-style-type: none"> Food and beverage reimbursement Out of state travel not approved by ESE Credit courses not specific to Title I Travel costs should not exceed 10% of allocation without approved justification.
9. Other Costs	<ul style="list-style-type: none"> Memberships/subscriptions Transportation to allow for student access to Title I-related initiatives if not available otherwise Transportation costs to maintain educational stability for students in foster care Costs to improve the recruitment, support, and retention of culturally competent and responsive educators, especially educators from underrepresented minority groups, to meet the needs of diverse student populations Printing/copying for Title I-related activities Space rental for Title I-related activities 	
10. Indirect Costs	<ul style="list-style-type: none"> District indirect cost rates 	<ul style="list-style-type: none"> Indirect rate greater than the percentage assigned to district
11. Equipment	<ul style="list-style-type: none"> Equipment costing more than \$5,000 per unit and having a useful life of more than a year. All equipment must be used for Title I programs. Must be itemized with a brief statement of the need for the item. 	

* Please note: This is not an exhaustive list. [Contact](#) our office for more specific, situational and fiscal guidance as needed.

Supplement not Supplant in Title I under ESSA

- Title I funds should add to (supplement) and not replace (supplant) state and local funds. Prior to reauthorization of ESEA under ESSA, supplement not supplant was typically tested by analyzing an individual Title I cost's compliance with "three presumptions of supplanting." **Under ESSA, compliance with SNS will no longer be tested through individual Title I costs, so these three presumptions no longer apply.**
- Under ESSA, districts must demonstrate that the methodology they use to allocate state and local funds to schools provides each Title I school with all of the state and local money it would receive if it did not participate in the Title I program. This should expand Title I's spending options. Title I costs must still be allowable and must still support eligible students among other requirements.

Private Schools

- Must have meaningful and timely [consultation](#) in the spring.
- Title I funds can only be used for supplemental academic and/or academically-related support services to eligible students, their teachers and families.
- District must maintain control of funds and may not pay or reimburse private schools directly.

Amendments

- Required when there is any significant change in program objectives; any increase or decrease in the total amount of the grant; an increase in a line of the budget that exceeds \$100 or 10% of the line (whichever is greater) or exceeds \$10,000.
- For ongoing FY23 grants administered via EdGrants**, request and submit an amendment between the 1st and the 15th of the month as to not collide with the payment request windows. To request an amendment, email your district liaison.
- Amendments for grants administered through the new Grants for Education Management System (GEM\$)**, i.e., FY24 FC 305, should be processed in GEM\$.

Updated May 2023

The contents of this document do not have the force and effect of law and are not meant to bind the public in any way; they are intended only to provide clarity to the public regarding existing requirements under the law or agency policies.

Joan Lineman

From: Erin McMahon <emcmahon@saugus.k12.ma.us>
Sent: Tuesday, December 20, 2022 1:33 PM
To: Pola Andrews
Subject: Fwd: error in 11/30 billing
Attachments: 3-Invoice-Saugus Public-Tschang 11 30 22 Revised v2.xlsx

Dear Pola,

I authorized work beyond initial scope based on the guidelines of PD for the district.

Thanks,

Erin

----- Forwarded message -----

From: Chi Tschang <chi@excellencereflex.com>
Date: Tue, Dec 20, 2022 at 12:29 PM
Subject: RE: error in 11/30 billing
To: Erin McMahon <emcmahon@saugus.k12.ma.us>

Hi Erin – here you go!

From: Erin McMahon <emcmahon@saugus.k12.ma.us>
Sent: Tuesday, December 20, 2022 11:53 AM
To: Chi Tschang <chi@excellencereflex.com>
Subject: error in 11/30 billing

Dear Chi,

There was an error in the 11/30/22 bill. You worked 28 hours, not 24, which is \$8,400. Please send me a revised invoice.

Thank you,

erin

Invoice #	3
------------------	----------

Excellence Reflex Consulting

Attention: Chi Tschang
 639 4th Ave. #7A
 Brooklyn, NY 11232
 917-280-4517
chi@excellencereflex.com

Date of Invoice: November 30, 2022

For November work

Bill to
 Erin McMahan
 Saugus Public Schools

#	DESCRIPTION	AMOUNT
15	Consulting Fee: 28 hours of work	\$8,288.97
16		
17		
18		
	SUBTOTAL	\$8,288.97
	TAX RATE	0.00%
	OTHER	\$0.00
	TOTAL	\$8,288.97

Please make all checks payable to Excellence Reflex Consulting. If you have any questions concerning this invoice, contact Chi Tschang at 917-280-4517 or chi@excellencereflex.com

THANK YOU FOR YOUR BUSINESS!



Vin Serino

6/30/22

To: Erin McMahon >

Catch up

Hi Erin,

When you have a moment can you give me a call? I just want to go over a few things, nothing important. I know you have school in July, I was just wondering when you will be taking vacation as I don't want myself or the board to bother you or contact you while you are off. I want you to take the time to enjoy yourself. You put so much of yourself into the job you need time away to recharge.

Kindest regards,

Vincent Serino

Chairman





2:12 PM



4 Messages



3

Superintendent Vac...



----- Forwarded message -----

From: **Erin McMahon**

<emcmahon@saugus.k12.ma.us>

Date: Thu, Jun 30, 2022 at 3:01 PM

Subject: Superintendent Vacation

To: Vincent Serino

<vserino@saugus.k12.ma.us>

Cc: Thomas D'Amario

<tdamario@saugus.k12.ma.us>, Margo

Ferrick <mferrick@saugus.k12.ma.us>

Dear Mr. Serino,

I expect to take vacation between August 1 - August 15.
Any needs in the district during that time can be directed
to Dr. Ferrick.

I will be in class but available to the district and working,
as I did last year, between July 18- July 29.

Thank you for your support.

Sincerely,

Erin

--



3 Messages



Please calendar for...



Found in Personal Mailbox



Erin McMahon

8/23/21

To: Lisa Manning >

That's great and the April one is Patriot's day as you mentioned. Thank you.

On Sun, Aug 22, 2021 at 8:34 PM Lisa Manning <lmanning@saugus.k12.ma.us> wrote:

Dear Erin,

All dates have been added to your calendar. The Feb. 21st date is an actual holiday so no vacation or personal day needs to be taken, central office is closed that day.

Thank you,

Lisa





6:16 AM



3 Messages



2

Please calendar for...



Thank you,

Lisa

On Sun, Aug 22, 2021 at 7:07 PM Erin
McMahon

<emcmahon@saugus.k12.ma.us> wrote:

Dear Lisa,

Please calendar these dates (all
Mondays) for 2022.

It will be three personal days and three
vacation, as you schedule them.

Thank you,

Erin

----- Forwarded message -----

From: **Thomas Whittredge**

<twhittredge@saugus.k12.ma.us>

Date: Wed, Aug 18, 2021 at 8:38 PM





6:16 AM



3 Messages



2

Please calendar for...



<tw hittred ge@saugus.k12.ma.us>

Date: Wed, Aug 18, 2021 at 8:38 PM

Subject: Re: Teaching at Columbia

To: Erin McMahon

<emcmahon@saugus.k12.ma.us>

Thank you for the information. As contractually agreed to, take what time is necessary to fulfill your commitment to Columbia.

On Wed, Aug 18, 2021 at 6:19 PM Erin McMahon

<emcmahon@saugus.k12.ma.us> wrote:

Dear Mr. Whittredge,

My class dates for teaching at Columbia Business School are the following in 2022:

1/24



1/24

2/7

2/21

3/21

4/4

4/18

Process

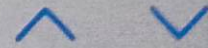
1. They are Mondays so that I can travel down on Sunday and return Monday early evening.
2. Two are during school breaks.
3. I will take that time as a personal or vacation day.

Sincerely,





Please calendar for...



Monday early evening.

2. Two are during school breaks.
3. I will take that time as a personal or vacation day.

Sincerely,

Erin McMahon

--

Thomas Whittredge
Chairman
Saugus School Committee

--

Lisa Manning
Confidential Executive Secretary
Superintendent's Office



2:35 PM

5 Messages

< 3

Thank you and upco...

Found in Inbox



Vin Serino

11/22/22

To: Erin McMahon >

Hi Erin,

The rest of the committee is on board, enjoy your Pearl Harbor day in Newark. This is approved, could I just get a quick recap in our December one on one meeting. It is just for me to better understand.

kindest regards,

Vincent Serino

Chairman

Saugus School Committee

[\(781\)-710-6861](tel:(781)7106861)

On Tue, Nov 22, 2022 at 10:06 AM Erin McMahon

