



CASE STUDY

Focus on Results: Arlington Public Schools (MA)

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Focus on Results: *Arlington Public Schools*

“A Win-Win Approach to Reducing Special Education Costs” authored by former Arlington, Massachusetts superintendent Nate Levenson and contained herein, lays out a replicable approach for special education reform that is distilled from his experience in Arlington. This case study illuminates the twists and turns of his effort as well as the performance outcomes. This example showcases a district’s ability to drive improvements in both student outcomes and service quality while simultaneously reducing costs. When these types of results are possible in a small district, DMC is even more optimistic about opportunities in larger systems.

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Former Arlington Public Schools Superintendent Nate Levenson recalls that he started his position in the district on a Friday. The day before, his predecessor as well as the district’s long time Director of Special Education both retired, handing him a blistering report from the Department of Education demanding 196 changes to special ed in the district or risk losing state aid. At the time, special education students were the lowest performing subgroup in the district. His first board meeting included an angry presentation by parents on special education, which they characterized as awful, uncaring, out of control, and out of compliance. Comparable districts typically might see two or three formal parental complaints to the Massachusetts DOE per year; Arlington’s parents had filed 25 in the previous school year alone. State regulatory compliance rates were below 10%. Not surprisingly, improving special education performance was a top priority. Was there a root cause for these problems? What levers could the district’s leadership pull to drive meaningful change?

Management Approach

Levenson joined the 4,500 student Arlington Public Schools (APS) in 2005 as a first-time superintendent with a non-traditional background. He immediately

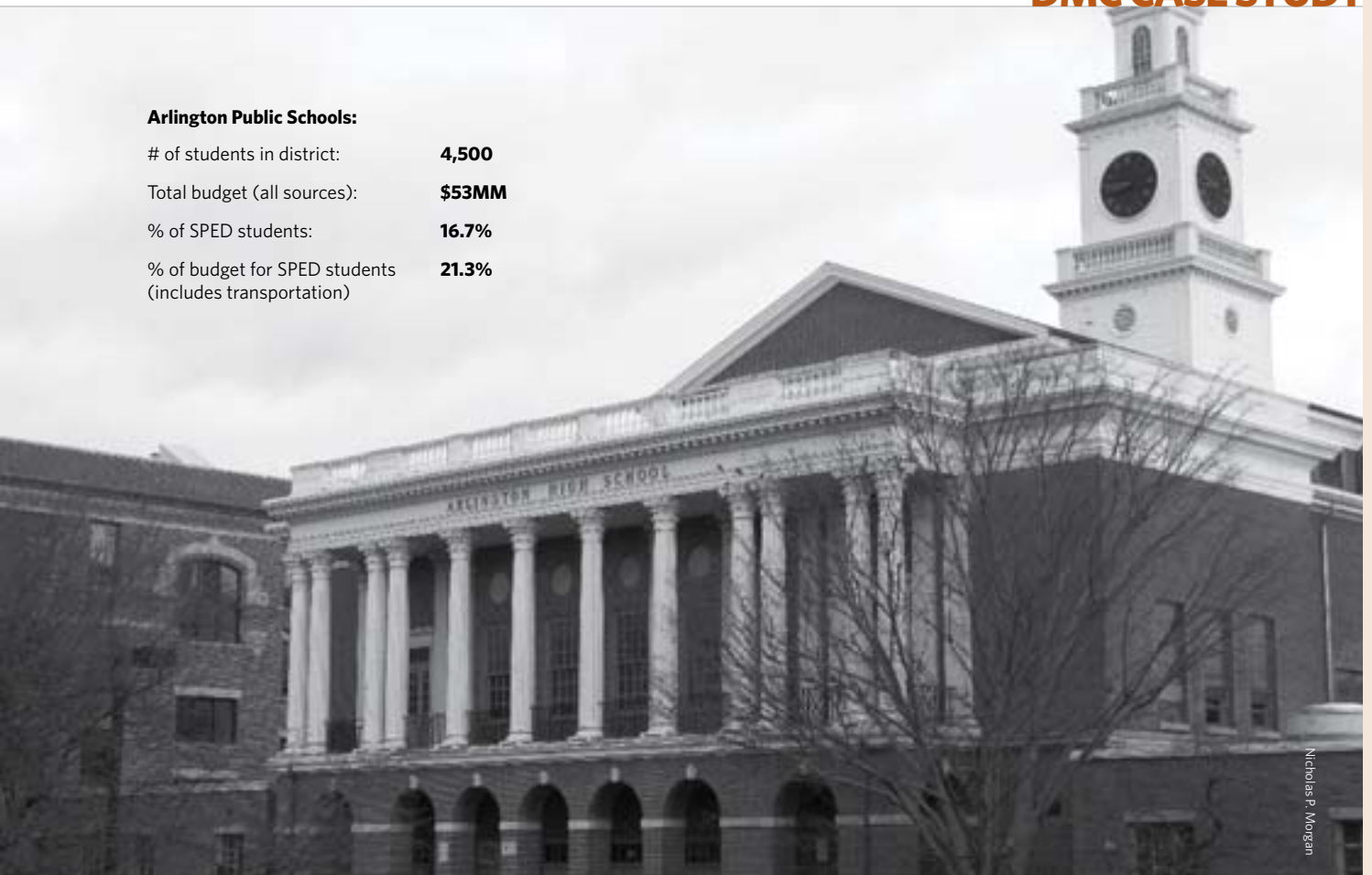
embarked on a listening tour of key stakeholder groups in the district and community. Regarding special education, the listening tour was inconclusive. Parents were unhappy, staff proud, and there was a strong sense that much more money was needed. This forced Levenson to seek what he terms “an honest starting place” for thinking about reforms, based on measurable facts, not conjecture or conflicting opinion. A major catalyst for pursuing reforms was the low compliance rate with state regulators. While it did not drive performance outcomes directly, the low compliance rate handcuffed the district. It became difficult to say “no” to any incremental hiring request and it stifled general education leaders’ willingness to tackle broader systemic improvements.

Levenson’s approach to the special education challenge had a seemingly basic starting point: to build a comprehensive inventory of programs in the district, along with basic information such as which students the programs serve, how much they cost, and the level of student achievement. As a new superintendent, he originally thought these would be relatively straightforward questions. However, he quickly learned that the answers were not readily available, nor were there clear owners of the necessary information.

The “silo” culture of special education quickly became apparent. Whose job was it to teach special ed

Arlington Public Schools:

# of students in district:	4,500
Total budget (all sources):	\$53MM
% of SPED students:	16.7%
% of budget for SPED students (includes transportation)	21.3%



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students? Was it just the Director of Special Education? The Assistant Superintendent? The classroom teacher? Who managed the finances? Forming the appropriate team with deep skills in finance, operations, data analysis, and pedagogy became paramount. The Arlington team's research and analysis yielded a game plan, and a wide variety of process and policy changes.

Arlington implemented Levenson's ten-step program described in the article herein "A Win-Win Approach to Reducing Special Education Costs." At the end of three years, a number of key managerial insights were recorded:

- Assembling the right team, with an appropriate mix of pedagogical, logistical, and financial skills is critical.
- An audit of opportunities that assembles a comprehensive set of facts and data is critical to identifying the opportunities up front.
- The budget process for special education needs to be managed, not just accepted as a given, and dollars spent must result in student achievement.

Formal complaints by Arlington special education parents to the Massachusetts DOE went from 25 in 2004-05 to zero in 2007-08.

- Merge general education and special education in all matters related to student learning.
- Communications planning for all stakeholder groups is extremely important. In particular, 1-to-1 communications with families is critical in order to adhere to agreed-upon plans.
- Staff should be assigned to caseloads, not to buildings. Caseload management with monthly reporting is critical.
- Set clear rules for granting services to students and apply them consistently in all schools. ▷

Before the management reforms were tackled, special education in Arlington was loosely managed, unmonitored, and out of control. One administrator called it a black hole. The front line staff was talented and dedicated, but without a clear vision, performance data, and a coherent strategy, the results were unacceptable. Afterward, focus was established, costs controlled, and student achievement improved. Strong leadership throughout the process was critical. This is not an endeavor for conflict-avoiders!

In the 2007-08 school year, the number of K-2 students not reading at grade level was reduced by 52% during one academic year.

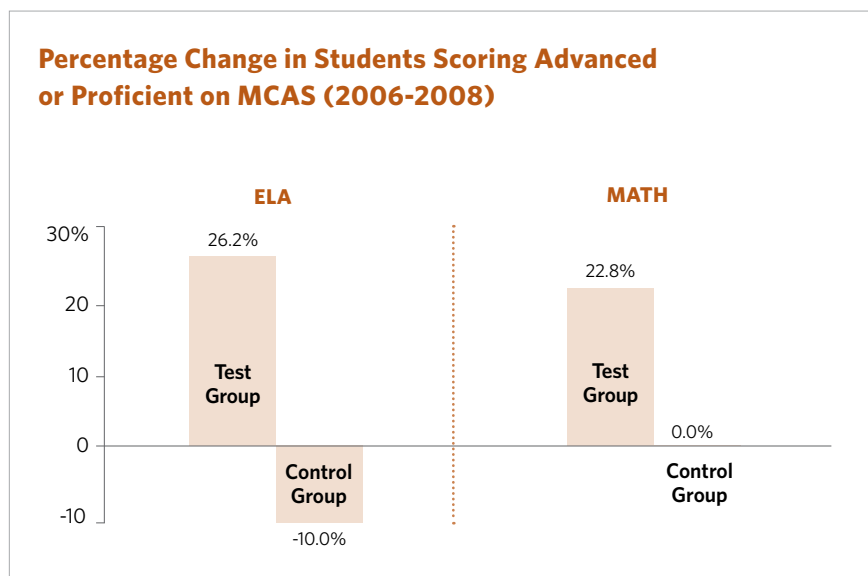
Performance Results

As Levenson finished his tenure in the district, the improvements in special education outcomes were dramatic in terms of student achievement, parent satisfaction, and finances. On the academic achievement front, the results were striking. Eight schools in Arlington embraced the changes and implemented

new approaches to instruction in reading, math and English. These schools also used the new methods for remediation and intervention for students struggling in reading, math and English. One school resisted most changes and maintained the past practices. This school served, unintentionally, as a control group. The contrast in Massachusetts standardized test score results (MCAS) is shown in Figure 1 below. Schools that had implemented the changes increased the number of students scoring advanced or proficient by 26.2% in ELA and 22.8% in Math. The “control” school that did not implement the new strategies was flat in math and actually decreased the number of advanced or proficient students in ELA by 10%. In the 2006-07 school year, the number of K-2 students not reading at grade level was reduced by 34% during one academic year. This was followed by even better results in 2007-08: the number not reading at grade level was reduced by 52%. Academically, the results of the new management approaches were impressive.

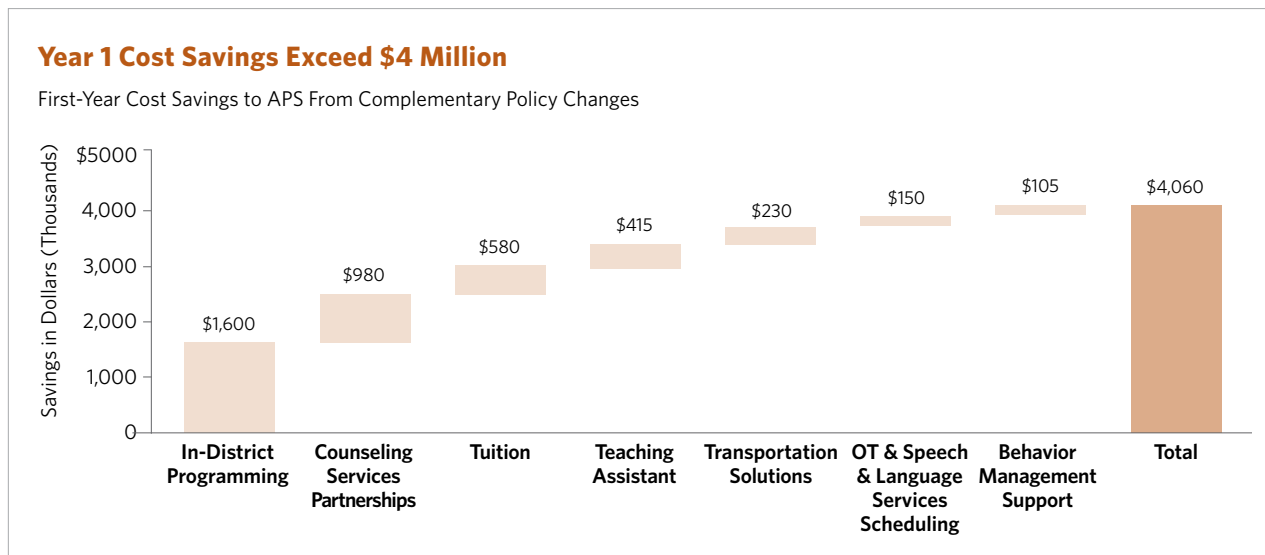
Moreover, parental satisfaction also improved significantly as the changes took effect. In the three years since Levenson took office, the number of parental DOE complaints fell from a high of 25 to zero. In addition, a scientific survey conducted by an outside polling company showed that 50% of parents noted an increase in responsiveness of the special education department. A year later, in a similar parent poll, the percentage seeing increased responsiveness rose an additional 66%. And lastly, the original catalyst—state compliance

FIGURE 1



Eight schools in Arlington embraced the changes and implemented new approaches to instruction in reading, math, and English. They also used the new methods for remediation and intervention for struggling students in reading, math, and English. One school resisted most changes in these areas and maintained the past practices. This school served, unintentionally, as a control group.

FIGURE 2



As many of these costs would have been recurring, the net present value of the policy changes can be conservatively estimated at over \$20MM.

levels—moved from below 10% to approximately 90% compliance during the three years of Levenson’s leadership.

Financially, the results were perhaps even more impressive. As Figure 2 above shows, the first-year savings across the various efforts total over \$4 million. The tactics to achieve these savings can be grouped as follows:

- **In-district Programming:** New or substantially redesigned separate programming to reduce out-of-district placements.
- **Counseling Services Partnerships:** Teaming with non-profits to provide onsite counselors, social workers and drug and alcohol support.
- **Tuition Savings:** Decrease the flow of special ed students to costly vocation school.
- **Teaching Assistant Policies:** Stopping the growth in headcount, and more efficient scheduling.
- **Transportation Solutions:** Regional planning, route combinations, fiscal oversight, and parent incentives.
- **Occupational Therapy and Speech and Language Services Scheduling:** Reduced staffing due to improved scheduling.
- **Behavior Management Support:** Students retained in general ed classrooms rather than placed in separate programs.

The cost savings from reducing the flow of students requiring special ed services due to improved general ed instruction and remediation was not calculated, but will undoubtedly be significant.

As many of these costs would have been recurring, the net present value (the savings over time) of these changes can be conservatively estimated at over \$20,000,000.

Conclusion:

The case of Arlington Public Schools’ management of special education demonstrates a district’s ability to drive dramatic improvements in student outcomes and service quality while simultaneously reducing costs. In the current environment of increased budgetary pressure, these improvements in student outcomes coupled with significant cost reductions serve as a welcome example of an opportunity to increase overall district productivity. DMC believes that Superintendent Levenson’s ten-step process can be a very effective methodology for leaders to evaluate similar opportunities in their districts. □



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