



LEADERSHIP PROFILE REPORT

Lower Merion School District, PA

HISTORY/BACKGROUND

The Lower Merion School District (LMSD), located in Philadelphia's historic Main Line suburbs, serves the 62,000 residents of Lower Merion Township and the Borough of Narberth. Established as one of Pennsylvania's first public school districts in 1834, LMSD enjoys a rich tradition of achievement, innovation and community partnership and a longstanding reputation as one of the finest school systems in the United States. The district's six elementary schools, two middle schools and two high schools provide a challenging, multi-disciplinary academic program and dynamic, co-curricular experience to more than 8,700 students. Currently a state-of-the-art third middle school to accommodate 1,200 students is under construction.

Of the District's ten eligible schools, all have received recognition for excellence by the Commonwealth and seven have received the National Blue-Ribbon Award for Excellence in Education. LMSD schools rank among the highest in Pennsylvania for SAT and PSAT scores, AP Participation rate, total number of National Merit Semifinalists, total number of International Baccalaureate diplomas granted and in numerous publications' "Top Schools" lists. Approximately ninety-four percent of high school graduates attend institutions of higher learning. LMSD is one of only two districts in Pennsylvania to earn Moody's highest bond rating, a reflection of outstanding fiscal strength and stewardship.

This report presents the findings of the Leadership Profile Assessment conducted by Hazard, Young, Attea & Associates (HYA) in May of 2021 in support of the search for the new superintendent of the Lower Merion School District. The data contained herein were obtained from input received by HYA Vice President, William Adams, Ed.D., and HYA Senior Associates, Monica Browne, Ed.D., and Edward McCormick after meeting with individuals and Focus Groups in either an interview setting or larger group settings in the time period spanning May 4 -May 21, and from the results of the online survey completed by stakeholders. The surveys, interviews, and focus group meetings were structured to gather input to assist the Board of Directors in determining the primary characteristics desired in the new superintendent. Additionally, the stakeholder interviews and focus groups provided information regarding the strengths of the district and some of the challenges that it will be facing in the coming years.

EXECUTIVE SUMMARY OF FINDINGS

Strengths of the District:

Among the most frequent strengths discussed by focus group participants and during interviews, as well as reflected in the survey, is the exemplary reputation of the school district and the quality of the educators who work on behalf of the students. The employees are willing to put forth significant effort in service of the students and their families. The positive reputation of the schools, the quality of the programming, and the overall achievement of the students are strengths on which the district continues to build.

The members of the Lower Merion School District communities are engaged and well educated. Parents and community members are committed to the continual improvement of the academic, extra-curricular, and social-emotional growth of the students. The financial stability of the district can be directly attributed to the overall support of the schools and their programs by the residents of Lower Merion Township and the Borough of Narberth. Parents, as individuals and as members of several long-standing groups, are willing and able to support the schools using their expertise and collective efforts.

The inclusive process by which the Strategic Plan was developed, as well as the robust goals that were collectively decided upon are widely considered strengths of the district on which the new Superintendent will need to build upon and expand. There exists agreement between and among all constituency groups that students in the Lower Merion School District enjoy high quality academic and extracurricular programs that are available in the schools. The district is well-known for the ongoing commitment to Diversity, Equity, & Inclusion (DEI). Students, staff, parent groups, and the Board of Directors have made addressing ongoing DEI issues and needs a priority. Although this has been a consistent district priority, stakeholders recognize that the continued efforts must be pursued vigorously.

Despite the challenges presented in the following section, The Lower Merion School District has numerous foundational pillars on which to continually improve. These include a progressive mindset, well-maintained facilities, expansive curricular opportunities, technology that is regularly integrated into classroom instruction, supportive parents, high-performing students, and an overall desire to keep Lower Merion Public Schools as a source of pride for all members of the community. Further they include the desire and goal to be known as an exemplar district recognized for progressive initiatives designed to meet the evolving needs of students as they prepare to become productive members of society.

Challenges and Issues Facing the District

Considerable concern among staff, the Board of Directors, and community members for improving the relationships between the district and individual parents, groups, and the town government was noted during individual interviews and focus group sessions. This concern centered on the desire to foster more positive relationships in which the common goal of meeting the mission of the district becomes the central focus. The perception exists that the opinions of those who choose to become involved in controversial discussions are sometimes disregarded by District leaders which results in some vocal individuals becoming disenfranchised. Litigation, both actual and threatened, is stifling progress and consumes too much time and energy for the Board of Directors, Superintendent, and staff. In addition, the lack of trust that exists between individuals or stakeholder groups and the district administration and governing body seems evident and results in a climate that is not conducive to implementation of progressive changes.

The construction of a new middle school, as well as the proposed changes to the grade level configuration were concerns that were made clear during interviews and focus group sessions. Most agreed that acceptable solutions will only be found if all stakeholders work together to address the underlying reasons for the decisions. Transparency in decision making for all issues, but specifically for the new school, was a common request articulated by individuals and groups. The balance between keeping members of the community involved in the decision-making process by seeking input at various stages and accomplishing goals in a reasonable amount of time is a common concern expressed in regard to several ongoing challenges.

While the Strategic Plan sets out the ongoing goals for the district, the plan for implementation and the pace at which DEI issues are discussed and acted upon remains challenging. The programs and processes involved in Special Education continue to be viewed as areas in need of attention in the Lower Merion School District. Keeping student voice at the forefront of these discussions, as well as demonstrating the courage to take the risks necessary to achieve the lofty goals articulated in the Strategic Plan will be necessary in the coming years.

Lastly, the new superintendent needs a clear vision for educational excellence that aligns with the existing Strategic Plan. The successor superintendent should have a clear vision for the future that is openly articulated and includes building trusting relationships with stakeholders. There is a collective desire for an innovative educational leader who can

demonstrate a genuine interest in and commitment to the schools while harnessing the positive energy required to help the students and faculty meet their collective potential.

Conclusion

HYA and the Board intend to meet the challenge of finding an individual who possesses most of the skills and character traits required to meet the needs of the district. The search team will seek a new superintendent who can work with the Lower Merion Board of Directors and stakeholders to provide the leadership needed to continue to raise academic standards and student performance, while meeting the unique needs of each of its students.

The search team thanks all the participants who were interviewed, attended focus groups meetings and/or completed the online survey and the Lower Merion staff members who assisted with our meetings, particularly Megan Shafer who organized the Focus Group meetings, Amy Buckman who assisted in promoting community engagement, and Denise LaPera who assisted with logistics.

PARTICIPATION

Participation: The number of participants by stakeholder groups and the two methods of data gathering are listed below. *(Note: Not all focus groups were disaggregated for the online survey.)*

Group	Personal Interviews or Focus Groups	Online Survey
Board of Directors	9	
Cabinet and Current Superintendent	12	
Administrative Supervisors (Cert.)	5	
Administrative Supervisors (non-Cert)	3	
Open Public Forums	52	
Elementary Professional Staff	6	
Principals/Asst. Principals – Elementary	6	
Principals/Asst. Principals – Secondary	9	
LMEA Leadership	4	
Secondary Professional Staff	1	
Committee for Special Education	7	
Elementary Support Staff	1	
Clinical Staff	0	
Support Staff (Tech/Ops/Trans/Nutr)	0	
Administrative Support Staff	2	
Committee to Address Race in Education	6	
Ad-Hoc Committee on Anti-Racism & Equity	34	
HSAs	3	
ISC	10	
Education Foundation & Scholarship Fund	4	
Alumni Association	0	
Faith-Based Organizations	3	
Civic Associations	5	
Open Staff Forum	9	
HS Students	0	
Achievement Imperative Task Force	3	
Black/BIPOC Parent Groups	12	
Special Education Parents	16	
Former Directors	2	
Parents/Guardians Current Students		517
Community Member/Business Member		74

Professional Staff		83
Support Staff		20
Administration		25
Students		195
Total	224	914
Grand Total = 1,138		

A summary of the Community Survey results is provided in the form of a PowerPoint presentation. This summary is meant to be a stand-alone complementary piece to the Leadership Profile Report. The basis for formulation of the draft Desired Leadership Characteristics is from the review and analysis of these two documents.

It should be emphasized that the data are not a scientific sampling, nor should they necessarily be viewed as representing the majority opinion of the respective groups to which they are attributed. Items are included if, in the consultants' judgment, they warranted the Board's attention. It is noted some stakeholder participants attended multiple meetings and thus some perspectives may be overrepresented or stated. Further possibly due to the expansive number of input opportunities the focus groups often resulted in small groups in which singular perspectives were presented. This caution is in no way intended to diminish the importance of the input that was provided by each and every stakeholder, but rather to put all of the data points into perspective. To achieve this raw data is provided in an unfiltered manner.

Survey Summary

A summary of the survey results is presented as follows. Of the 914 stakeholders who participated in the community survey it is interesting to note that over 56% or 517 of the respondents were parents or guardians of children who currently attend the one of the schools in the Lower Merion School District. The second largest group was students who comprised approximately 21% of all respondents or 195 of the total respondents. A PowerPoint presentation of the survey results is attached.

On a Likert Scale of five (5), with five being the most favorable, the three greatest strengths of the district were identified as:

- Technology is integrated into the classroom. (4.23)
- District schools are safe. (4.20)
- Facilities are well maintained. (4.17)

The three lowest weighted rated or least favorable are as follows:

- The district is heading in the right direction. (3.11)
- The district engages the community as a partner to improve the school system. (3.00)
- There is transparent communication from the district. (2.83)

The three highest professional standards identified from the 10 provided were as follows:

- Curriculum, Instruction and Assessment: Effective educational leaders develop and support intellectually rigorous and coherent systems of curriculum, instruction, and assessment to promote each student's academic success and well-being. (6.99)
- Community of Care and Support for Students: Effective educational leaders cultivate an inclusive, caring, and supportive school community that promotes academic success and well-being of each student. (6.58)
- Ethics and Professional Norms: Effective educational leaders act ethically and according to the professional norms to promote each student's academic success and well-being. (6.53)

Summary of Comments from Focus Group Meetings, Individual Interviews and Community Forum

The structure of the focus groups was open, allowing for participants to build upon each other's comments. Participants were asked to respond to the following questions.

- What do you consider the greatest immediate challenges for the district and what do you consider the greatest challenges over the next three years?
- What do you consider the greatest current strengths of the district and what strengths do you wish to see maintained and/or expanded?
- What are the 3 - 5 most desired characteristics that you believe the next Lower Merion superintendent will need to possess in order to succeed and to take the district to the next level of success?

- Is there anything else that you would like to add that would assist the HYA team in developing and preparing the leadership profile for Board consideration?
- Would you like to recommend any candidates for this position?

Individual interviews were conducted in the same manner for members of the Board of Directors and for members of the cabinet/central office staff. To conclude each session, the HYA consultant asked if the participant(s) have any recommendations for specific candidates who should be notified of the process.

The results of the interviews and group meetings are compiled into a single document based on the interviewer's interpretation of the responses. These results will be presented to a Board and then used for recruiting and candidate evaluation purposes. Given that permission was not overtly granted, the names of individuals recommended as a potential executive leader of interest will not be shared in this document. The HYA consultants will contact those suggested and notify each about the process.

The summaries from community forums, focus group meetings, and individual interviews are reported at the end of this document and are provided to assist the Board in its deliberations regarding the desired characteristics of the successor superintendent. The comments of stakeholders who sent follow-up email messages after focus group meetings were incorporated into the notes from that session.
