

**Valley Collaborative
Board of Directors Meeting
25 Linnell Circle, Billerica, Massachusetts
Thursday, December 12, 2019 ▪ 10:00 a.m.**

Action Required

- I. Approval of Minutes
 - a. Board of Directors, General Session: November 13, 2019
- II. Financial Update
 - b. Re-Vote FY'20 Budget
 - c. Review of Proposed FY'21 Budget (Approval of the FY'21 Budget will occur at the January 16, 2020 Board Meeting.)
 - d. Approval of FY'19 Annual Report
 - e. Treasurer's Report
 - f. PARS OPEB Trust Program
- III. MEC's 14 Boxes of Personnel Records

No Action Required

- IV. QUEST Update
- V. Valley Transitional High School Field Trips
 - g. Transitional High School Transitional Programming Class Trip to Canadian Maritimes
 - h. Transitional High School Alternative Programming Class Trip to Mount Baker, Washington
- VI. Communications
 - Making a Difference Awards
 - i. Students, Adult and Staff of the Month
 - School Monthly Updates
 - j. Elementary School Updates
 - k. Alternative Programming Middle School and Transitional High School Updates
 - l. Transitional Programming Middle School and Transitional High School Updates
 - m. Adult Program Updates
 - Community and Staff Feedback
 - n. QUEST Audit Email from Michelle Stomboly-Lorenzo
 - o. QUEST Audit Email from Heather Valcanas
 - p. Happy Thanksgiving Email
 - Community Relations
 - q. Thank you Email from John Crocker
 - r. Replacement Window Email from Tom Gibson



Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Approval of Minutes

Attached please find the following minutes:

- a. Board of Directors, General Session: November 13, 2019

Required Action:

Vote to approve the minutes:

- a. Board of Directors, General Session: November 13, 2019

Attachments:

Board of Directors, General Session: November 13, 2019

**Valley Collaborative Board of Directors
General Session Meeting Minutes
November 13, 2019
10:03 a.m. – 10:30 a.m.
25 Linnell Circle, Billerica, MA**

Board Members Present: Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Denise Pigeon, Dr. Jay Lang, Mr. Christopher Malone, Dr. Laura Chesson, Mr. Brad Morgan

Board Members Absent: Mr. Everett Olsen, Mr. Steven Stone

Collaborative Representatives Present: Dr. Chris Scott, Executive Director

Also Present: Thomas Lent, Marathas Barrow Weatherhead Lent LLP

Call to Order: Mr. Timothy Piwowar, Chairman, convened the Collaborative Board Meeting at 10:03 a.m.

Mr. Piwowar welcomed all in attendance.

Approval of Minutes

Mr. Timothy Piwowar requested the Board to review the meeting minutes made available for review and asked for a motion relating to the minutes.

On a motion made by Dr. Michael Flanagan and seconded by Mr. Christopher Malone, a quorum of voters being present, it was voted:

VOTED: To approve the General Session Meeting Minutes for the Board of Directors dated October 24, 2019.

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Denise Pigeon, Dr. Jay Lang, Mr. Christopher Malone, Dr. Laura Chesson, Mr. Brad Morgan

On a motion made by Dr. Michael Flanagan and seconded by Dr. Jay Lang, a quorum of voters being present, it was voted:

VOTED: To approve the General Session Meeting Minutes for the Executive Committee of the Board of Directors dated October 28, 2019.

The vote was 3-0-4. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Jay Lang
Abstentions: Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Laura Chesson, Mr. Brad Morgan

Students, Adult and Staff of the Month

Dr. Chris Scott and the Board recognized Valley Collaborative's Students, Adult and Staff of the Month

Financial Update

Fiscal Year 2020 Update

Dr. Chris Scott provided the Board with a summary regarding the first quarter of Fiscal Year 2020. She indicated that enrollment was slightly down as compared to Fiscal Year 2019. She explained that revenues demonstrated a slight increase, while expenses decreased. She indicated that the efforts to prepare and finalize the Fiscal Year 2021 budget, which will be presented at the December 2019 Board meeting, are continuing with the Fiscal Year trending data being analyzed to assist in budget preparation. She informed the Board that she had met with the member district SPED directors during which she received positive feedback relating to the Collaborative's programs and services and current tuition rates and fees. She explained that an analysis of the current tuition rates and fees remains ongoing to determine whether a raise in the same within certain programs will be proposed as part of the Fiscal Year 2021 budget.

Dr. Scott directed the Board to her memo within the Board materials that provided a summary to the Board of an inadvertent error made with respect to the Collaborative's CORI process whereby unauthorized and/or incomplete forms were uploaded. She explained that the error had been self-reported, subsequent conversations with the proper representatives had been held, and that the Collaborative was awaiting a decision about how to proceed.

Dr. Scott also provided a summary of the ongoing QUEST audit of the adult programs. She explained that the final audit results are expected to be presented during the Board's February 2020 Board meeting, but that preliminary results indicate significant improvement and progress from the previous audit conducted two years ago.

Fiscal Year 2019 Audit

Dr. Scott informed the Board that the independent auditors had finalized the audit, incorporating the Board's review and approval from the October 24, 2019 meeting, and that the final will be available for distribution in the near future. There was no further discussion.

Treasurer's Report

Ms. Heidi Kriger, the Collaborative Treasurer, was unable to physical attend the Board meeting. Ms. Kriger, however, had provided the Board with her written report for the meeting, a copy of which was included within the Board materials. There was no further discussion.

On a motion made by Dr. Michael Flanagan and seconded by Dr. Jay Lang, a quorum of voters being present, it was voted:

VOTED: That the Board of Directors accepts the report of the Collaborative Treasurer and requests that a copy of the report be filed within the Treasurer's file maintained at the Collaborative

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Denise Pigeon, Dr. Jay Lang, Mr. Christopher Malone, Dr. Laura Chesson, Mr. Brad Morgan

School Monthly Updates

The Board received updates from the Principals and Assistant Director of Adult Services, respectively, relating to the Elementary, Alternative Programming Middle School and Transitional High School, Transitional Programming Middle School and Transitional High School, and Adult Program.

Communications

Dr. Scott directed the Board to the communications contained within the Board materials. There was no further discussion.

On a motion made by Dr. Denise Pigeon and seconded by Dr. Jay Lang, a quorum of voters being present, it was voted:

VOTED: To adjourn the Board meeting.

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Denise Pigeon, Dr. Jay Lang, Mr. Christopher Malone, Dr. Laura Chesson, Mr. Brad Morgan

Mr. Timothy Piwowar adjourned the Collaborative Board Meeting at 10:30 a.m.

LIST OF DOCUMENTS USED, DISTRIBUTED AND REVIEWED AT THIS MEETING:

- School Year 2019-2020 Electronic Board Binder for November 13, 2019 Meeting

Respectfully Submitted,

Mr. Timothy Piwowar, Chairman

Dated: _____



Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: FY'20 Budget Amendment

- Operating expenses are projected to be less by \$294,416 than the originally approved FY'20 budget.
- Salaries are slightly lower as there are a number of FTEs that were originally budgeted for FY'20 that will no longer need to be filled. I do not want to remove all of them at this time, as enrollment fluctuates and most of these positions are paraprofessionals that may be needed this fiscal year.
- Last year at this time, there were 258.37 FTEs [310 students] on payroll. As you recall, we reduced the number of staff in February by 17 FTEs to 241.37 FTEs [302 students] due to declining enrollment and this year there are currently 232.07 FTEs [291 students].
- Enrollment is currently down by 19 students over last year at this time. For the 59 non-member districts, total enrollment is only down 2 students [1%] over last year at this time. However, for member districts enrollment is down 17 students [11%] over last year at this time. We continue to encourage our member districts to build their own programs so that their students can remain in-district and avoid long bus rides. Please find attached the enrollment summary by district in our member and non-member towns.
- As you are aware, Valley's operations are nimble and flexible allowing it to respond to fluctuating enrollment trends without negative financial consequences.
- Overall revenues continue to be on target because of the increase in tuition rates and the increase in DDS contracts.

Required Action:

Vote to amend the FY'20 budget.

Attachments:

Building a community that empowers children and adults to find their own way.

FY19 & FY20 December Member District Enrollments

FY19			FY20		
District	# of Students		District	# of Students	Difference
Billerica Public Schools	25		Billerica Public Schools	21	-4
Chelmsford Public Schools	42		Chelmsford Public Schools	39	-3
Dracut Public Schools	19		Dracut Public Schools	19	0
Groton-Dunstable Regional School District	4		Groton-Dunstable Regional School District	2	-2
Nashoba Valley Technical High School	0		Nashoba Valley Technical High School	0	0
North Middlesex Regional School District	17		North Middlesex Regional School District	18	1
Tewksbury Public Schools	21		Tewksbury Public Schools	20	-1
Tyngsborough Public Schools	12		Tyngsborough Public Schools	9	-3
Westford Public Schools	21		Westford Public Schools	16	-5
TOTAL	161		TOTAL	144	-17

ENROLLMENT 12.21.18

PROGRAM	NON MEMBER	MEMBER	TOTAL
Elementary School - EBS	6	13	19
Elementary School - EBS - 45-Day Assessment	0	3	3
Elementary School - ISN - EBS	11	9	20
Elementary School - ISN - EBS - 45 Day Assessment	0	0	0
Elementary School - ISN - Pragmatic, Sensory, and Behavior Program	2	0	2
Elementary School - Pragmatic, Sensory, and Behavior Program	18	18	36
Elementary School - Pragmatic, Sensory, and Behavior Program - 45-Day Assessment	1	2	3
	38	45	83
High School - Alternative - Site 2	19	23	42
High School - Alternative - Site 2 - 45-Day Assessment	0	1	1
	19	24	43
High School - Alternative Vocational - Site 1	27	11	38
High School - Alternative Vocational - Site 1 - 45-Day Assessment	1	3	4
	28	14	42
Middle School - EBS	5	7	12
Middle School - EBS - 45-Day Assessment	0	1	1
Middle School - ISN	1	2	3
Middle School - ISN - EBS	2	1	3
Middle School - ISN - Pragmatic, Sensory, and Behavior Program	1	0	1
Middle School - Pragmatic, Sensory, and Behavior Program	4	9	13
Middle School - Pragmatic, Sensory, and Behavior Program - 45-Day Assessment	0	0	0
Middle School - School & Life Skills ISN	2	2	4
	15	22	37
School & Life Skills Training	9	16	25
School & Life Skills Training ISN	7	3	10
School & Vocational Training	18	12	30
School to Work	13	23	36

Intensive Special Needs	2	1	3
Intensive Special Needs - 45-Day Assessment	0	0	0
Transition Pathways	0	1	1
	49	56	105
TOTAL	149	161	310

PROGRAM	ENROLLMENT 12.11.19			DIFFERENCE		
	NON MEMBER	MEMBER	TOTAL	NON MEMBER	MEMBER	TOTAL
Elementary School - EBS	7	11	18	1	-2	-1
Elementary School - EBS - 45-Day Assessment	0	0	0	0	-3	-3
Elementary School - ISN - EBS	11	7	18	0	-2	-2
Elementary School - ISN - EBS - 45 Day Assessment	1	1	2	1	1	2
Elementary School - ISN - Pragmatic, Sensory, and Behavior Program	4	1	5	2	1	3
Elementary School - Pragmatic, Sensory, and Behavior Program	14	18	32	-4	0	-4
Elementary School - Pragmatic, Sensory, and Behavior Program - 45-Day Assessmer	0	0	0	-1	-2	-3
	37	38	75	-1	-7	-8
High School - Alternative - Site 2	16	19	35	-3	-4	-7
High School - Alternative Vocational - Site 2 - 45-Day Assessment	0	0	0	0	-1	-1
	16	19	35	-3	-5	-8
High School - Alternative Vocational - Site 1	23	9	32	-4	-2	-6
High School - Alternative Vocational - Site 1 - 45-Day Assessment	0	1	1	-1	-2	-3
	23	10	33	-5	-4	-9
Middle School - EBS	6	9	15	1	2	3
Middle School - EBS - 45-Day Assessment	1	0	1	1	-1	0
Middle School - ISN	0	3	3	-1	1	0
Middle School - ISN - EBS	3	3	6	1	2	3
Middle School - ISN - Pragmatic, Sensory, and Behavior Program	0	0	0	-1	0	-1
Middle School - Pragmatic, Sensory, and Behavior Program	9	6	15	5	-3	2
Middle School - Pragmatic, Sensory, and Behavior Program - 45-Day Assessment	0	1	1	0	1	1
Middle School - School & Life Skills ISN	1	3	4	-1	1	0
	20	25	45	5	3	8
School & Life Skills Training	5	12	17	-4	-4	-8
School & Life Skills Training ISN	9	5	14	2	2	4
School & Vocational Training	23	15	38	5	3	8
School to Work	10	19	29	-3	-4	-7

Intensive Special Needs	3	1	4	1	0	1
Intensive Special Needs - 45-Day Assessment	1	0	1	1	0	1
Transition Pathways	0	0	0	0	-1	-1
	51	52	103	2	-4	-2
TOTAL	147	144	291	-2	-17	-19



VALLEY COLLABORATIVE

FY2021 BUDGET SUMMARY Preliminary

	FY2018		FY2019		FY2020	FY 2020 Amendment	FY 2021		
	<u>Budget</u>	<u>Actual</u>	<u>Budget</u>	<u>Actual</u>	<u>Budget</u>	<u>Request</u>	<u>Request</u>	<u>vs. 2020 Amendment</u>	<u>% change</u>
REVENUES									
Services	15,260,680	16,804,372	16,416,426	16,567,747	17,384,445	17,484,445	17,484,445	\$ -	
State contracts	2,290,000	2,425,604	2,395,000	2,873,062	2,500,000	2,800,000	2,800,000	-	
Other	447,000	591,821	506,000	563,866	600,000	600,000	600,000	-	
Interest	4,500	40,917	20,000	60,945	20,000	20,000	20,000	-	
Total Revenues	\$ 18,002,180	\$ 19,862,714	\$ 19,337,426	20,065,620	\$ 20,504,445	\$ 20,904,445	\$ 20,904,445	\$ -	1.95%
EXPENSES									
Salaries	11,722,646	12,220,980	12,871,419	13,409,187	13,337,922	13,292,079	13,924,350	586,428	
Operating Expenses	5,457,929	6,010,188	5,581,125	5,829,933	6,369,937	5,769,412	6,075,521	(294,416)	
Total Expenses	\$ 17,180,575	\$ 18,231,168	\$ 18,452,544	19,239,120	\$ 19,707,859	\$ 19,061,491	\$ 19,999,871	\$ 292,012	1.48%
Revenues over/(under) Expenses	821,605	1,631,546	884,882	826,500	796,586	1,842,954	904,574	(938,380)	
NON-OPERATING									
Capital	425,000	0	425,000	-	525,000	1,600,000	575,000	50,000	0
Board Capital Reserve			-		-		-	-	
BUDGETED SURPLUS/(SHORTFALL)	\$ 396,605	\$ 1,631,546	\$ 459,882	\$ 826,500	\$ 271,586	\$ 242,954	\$ 329,574	86,620	



Central Administration Office

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris Scott, Executive Director
Date: December 12, 2019
Re: FY'21 Budget Draft Presentation

-
- Total expenses are up 1.48% compared to FY' 20 original budget, not including capital expenditures.
 - Salaries increase from \$13,337,922 in the original FY' 20 budget to \$13,924,350 in FY' 21, equating to a 4.4% increase.
 - \$454k step and lane increases
 - \$178k, 2.5% COLA increases
 - Health care costs increasing 5% - \$80k.
 - Overall, operating expenses are decreasing due to the following:
 - The Tyngsborough Elementary School capital project is completed.
 - The difference in expenses from original FY' 20 to FY' 21 is a decrease of \$294,416.00.
 - Capital items increased by \$50k, primarily due to an increase in vehicles.
 - DDS revenue increased by over \$300,000.
 - FY' 21 revenues were projected to be flat.
 - In FY' 21, there is a proposed tuition realignment/correction after a decade of no change for two programs. Basically, this correction has little to no impact on projected revenues for FY' 21.

FY'21 Budget Presentation



Salaries

- Salaries increase from \$13,337,922 in the original FY' 20 budget to \$13,924,350 in FY' 21, equating to a 4.4% increase.
- \$454k step and lane increases
- \$178k, 2.5% COLA increases

Capital

- Capital items decreased by \$1,025,000 from the FY' 21 amended budget, primarily due to the completion of the Tyngsborough Elementary School capital project.

Operating Expenses

- Operating expenses increased due to an increase in:
 - Salaries are up 4.4% from FY' 20 original budget due to step and lane increases as well as a 2.5% COLA across the board.
 - Operating expenses are down primarily due to the completion of the Tyngsborough Elementary capital project (\$400k in the FY' 20 original budget).
 - The capital budget is higher by \$50,000 compared to the FY '20 original budget due to a planned increase in vehicle purchases in FY'21.

Operating Expenses Cont'd

- Conservatively, the same revenue that we are projecting for FY'20 has been used to project FY'21.
- For two school programs - there are slight increases in tuition rates, which based on current enrollment, only impacts 27 member students.
- The DDS contracts are projected to increase by \$300,000 over the FY' 20 original budget, as the program continues to maximize its revenue.

Revenue

- Conservatively, the FY'21 budget was built on overall flat FY' 20 amended revenue projections.
- DDS revenue increased by over \$300k which is based on our actuals and trends in FY'20.

Proposed FY'21 Tuitions

- In FY' 21 there is a proposed tuition realignment/correction after over a decade of no change for:
 - High School & Middle School – School & Life Skills Training ISN Program
 - High School – Alternative Program.

Proposed FY'21 Tuitions

- Basically, this correction is not expected to generate any significant amount of revenue as there are only a small number of students enrolled in the impacted programs.

ENROLLMENT 12.11.19				
PROGRAM	Rate Increase	Member	Non Member	TOTAL
High School - Alternative - Site 2	\$10/day	19	16	35
Middle School - School & Life Skills ISN	\$54/day	3	1	4
School & Life Skills Training ISN	\$54/day	5	9	14

Proposed FY'21 Tuitions

Goal/Objective:

- By FY'22 ensure that all programs are cost effective and financially viable. In addition, our goal to reduce the number of tuition rates from the original fifteen in FY' 19 to five in FY' 21 will be met.

Proposed FY'21 Tuitions(cont'd)

- Given the complexity of projecting future enrollments, which drive the amount of revenue; it is challenging to project exactly what the overall revenue and expenses will be for FY'21. This proposal will result in an FY'21 proposed budget that will show a surplus of \$329,574.
- In 2012-2013 school year the Board voted to include over 1 million dollars of therapy services into the 2009 tuition rates. This vote remains in effect with this proposal. Cost savings for member districts in FY'19 was \$1,223,598 and non-member was \$1,317,172 – total for both member and non-member districts - \$2,540,770.
- In addition, fees-for-services are not increasing in FY'21.



VALLEY COLLABORATIVE

FY2021 BUDGET SUMMARY Preliminary

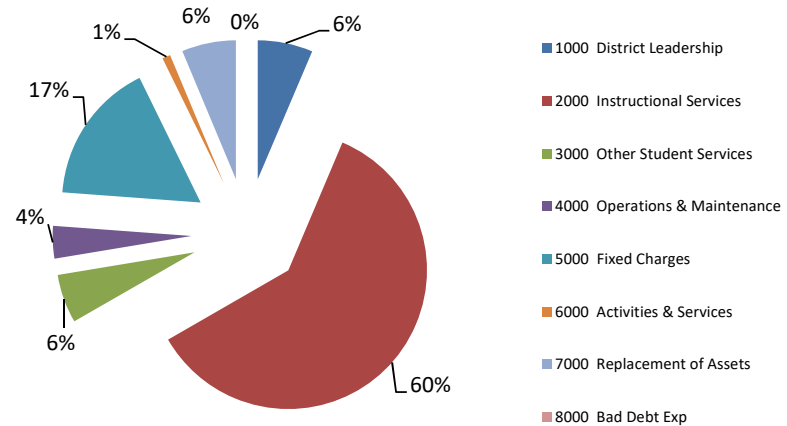
	FY2018		FY2019		FY2020	FY 2020 Amendment	FY 2021		
	<u>Budget</u>	<u>Actual</u>	<u>Budget</u>	<u>Actual</u>	<u>Budget</u>	<u>Request</u>	<u>Request</u>	<u>vs. 2020 Amendment</u>	<u>% change</u>
REVENUES									
Services	15,260,680	16,804,372	16,416,426	16,567,747	17,384,445	17,484,445	17,484,445	\$ -	
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Other	447,000	591,821	506,000	563,866	600,000	600,000	600,000	-	
Interest	4,500	40,917	20,000	60,945	20,000	20,000	20,000	-	
Total Revenues	\$ 18,002,180	\$ 19,862,714	\$ 19,337,426	20,065,620	\$ 20,504,445	\$ 20,904,445	\$ 20,904,445	\$ -	1.95%
EXPENSES									
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Operating Expenses	5,457,929	6,010,188	5,581,125	5,829,933	6,369,937	5,769,412	6,075,521	(294,416)	
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Revenues over/(under) Expenses	821,605	1,631,546	884,882	826,500	796,586	1,842,954	904,574	(938,380)	
NON-OPERATING									
Capital	425,000	0	425,000	-	525,000	1,600,000	575,000	50,000	0
Board Capital Reserve			-		-		-	-	
BUDGETED SURPLUS/(SHORTFALL)	\$ 396,605	\$ 1,631,546	\$ 459,882	\$ 826,500	\$ 271,586	\$ 242,954	\$ 329,574	86,620	

VALLEY COLLABORATIVE

Preliminary FY2021 Budget

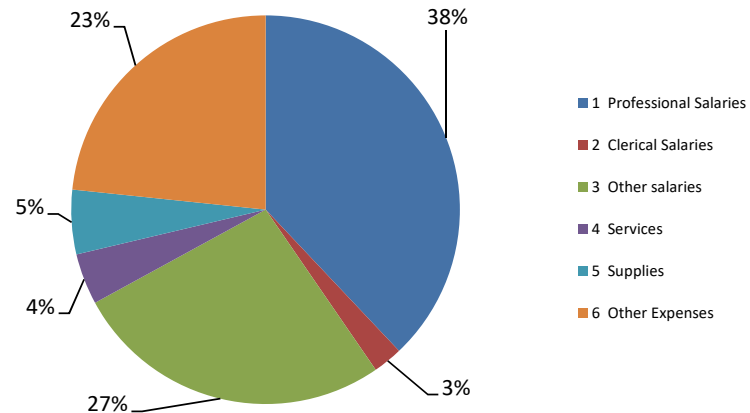
DESE FUNCTION:

1000 District Leadership	1,316,861
2000 Instructional Services	12,403,958
3000 Other Student Services	1,172,548
4000 Operations & Maintenance	778,185
5000 Fixed Charges	3,406,471
6000 Activities & Services	196,848
7000 Replacement of Assets	1,300,000
8000 Bad Debt Exp	0
	<hr/>
	20,574,871



DESE OBJECT:

1 Professional Salaries	7,807,077
2 Clerical Salaries	506,979
3 Other salaries	5,480,151
4 Services	875,650
5 Supplies	1,101,742
6 Other Expenses	4,803,272
	<hr/>
	20,574,871





VALLEY COLLABORATIVE
Recommended Capital Plan
FY2021-2025

	FY2017 Actual	FY2018 Actual	FY2019 Actual	FY2020 Budget	Five-Year Plan					5-year TOTALS
					FY2021	FY2022	FY2023	FY2024	FY2025	
FACILITIES ACQUISITION										-
FACILITIES IMPROVEMENTS	321,037	281,248	419,368	125,000	125,000	125,000	125,000	125,000	125,000	625,000
SITE IMPROVEMENTS	-	-	-							-
LEASEHOLD IMPROVEMENTS	-	-	-							-
VEHICLES	182,062	168,390	93,288	200,000	250,000	250,000	250,000	250,000	250,000	1,250,000
TECHNOLOGY PLAN	66,307	169,679	115,499	150,000	150,000	150,000	150,000	150,000	150,000	750,000
FURNISHINGS & EQUIPMENT	58,502	63,892	5,964	50,000	50,000	50,000	50,000	50,000	50,000	250,000
TOTALS	\$ 627,908	\$ 683,209	\$ 634,119	\$ 525,000	\$ 575,000	\$ 575,000	\$ 575,000	\$ 575,000	\$ 575,000	\$ 2,875,000



Central Administration Office

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris Scott, Executive Director
Date: December 12, 2019
Re: Approval of FY'19 Annual Report

Attached you will find the FY'19 Annual Report for your review.

Required Action:

Vote to approve the FY'19 Annual Report

Attachments:

FY'19 Annual Report

Valley Collaborative 2019 Annual Report



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General Information

Name of the collaborative: Valley Collaborative

Contact Information

Address:

25 Linnell Circle
Billerica, MA 01821

Phone:

978-528-7800

Website: www.valleycollaborative.org

Academic and fiscal year: 2018-2019 – FY'19

Valley Collaborative's Mission Statement:

To work collaboratively to create a structured learning environment that empowers individuals to lifelong learning and to navigate confidently and with optimal independence in their communities.

Valley Collaborative's Vision:

Valley Collaborative partners with families, districts, and the community to provide innovative programming that empowers students and adults to discover their individual strengths, interests, and abilities. In doing so, students become responsible contributing members of society.

Summary of Successes and Challenges

Message from Executive Director:

It's that time of year when we reflect upon our strengths and weaknesses so that we can improve upon programming and embrace best practices. Valley is now in the final year of a five-year improvement plan. In keeping with the spirit of continuous improvement, we will continue to send out surveys in the coming weeks to students, staff and families for their feedback. We are hoping our response rate will be close to 80 percent. Your feedback is important as it will help us to better serve the most vulnerable in our community in the best manner possible.

Valley's student-centered budget ensures that the students and adults we serve and educate receive the most effective curriculum as well as state-of-the-art resources to meet their special needs. On average our staff to student ratio remains between 1:1 and 1:5. Valley is also in excellent financial health. This year, for the fifth consecutive year, we returned surplus funds to our member districts, as required by the "25% rule". Thanks to sound fiscal management, Valley returned an additional \$500 thousand to our member districts.

The total number of days Valley billed districts for tuition was higher in FY '18 (63,802 days) than in FY'19 (63,310 days). Enrollment trends fluctuate and Valley's enrollment was lower than expected in the first three quarters. However, by year-end enrollment was higher than the previous fiscal year. In other words, as the year progressed Valley continued to receive many referrals because our programs are of the highest quality and our tuition rates are most competitive. This success can be attributed to a supportive, knowledgeable Board of Directors and the most caring and dedicated professional staff in the Commonwealth. Following are some of the financial highlights included in the Annual Report:

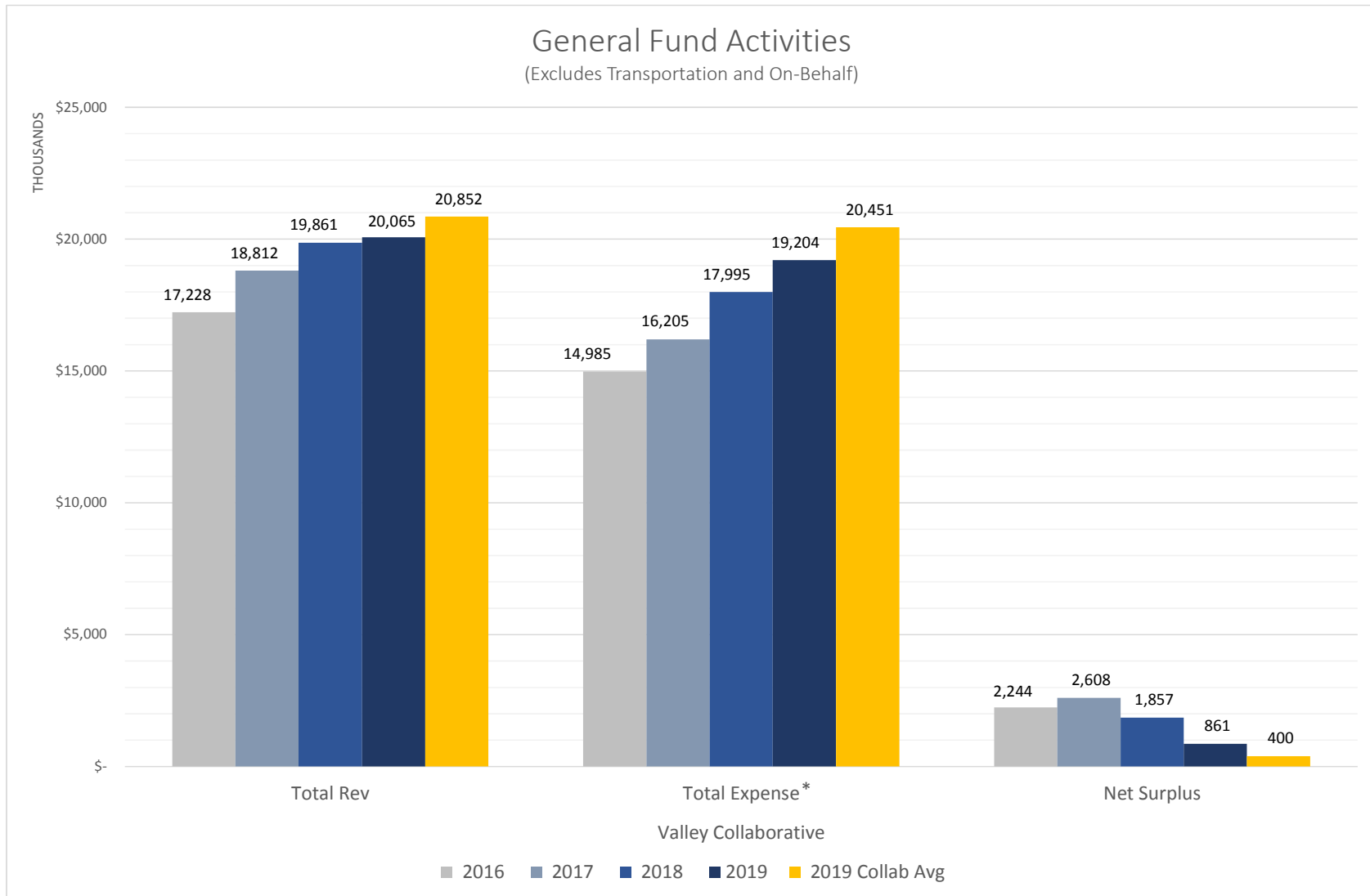
- The financial position of the Collaborative remains very strong. The total liabilities and net assets position at June 30, 2019 was \$16,799,112.
- As you are aware one of the significant challenges of operating Valley's "Special Education School District" is that we have to bill \$20 million to do it. Collections, once upon a time, were hundreds of thousands of dollars in arrears. Today collection of Accounts Receivable remains strong at nearly 100% due to the integrity of the billing system. The Collaborative's cash position remains solid with over \$9.9 million (\$5.9 million unrestricted and \$4.0 million OPEB restricted) in cash and cash equivalents. This is the result of strong Board oversight, solid financial management, proper billing and collections of receivables.
- The establishment of an OPEB Trust and Capital Fund has strengthened the Collaborative's balance sheet for the future.
- The Collaborative made capital purchases of \$680,774 in FY'19 for Vehicles, Furniture, Technology and Improvements.

Thank you for taking the time to read our Annual Report and for your support of Valley Collaborative. If you ever have a suggestion or need assistance, my door is always open.

My best to you always,

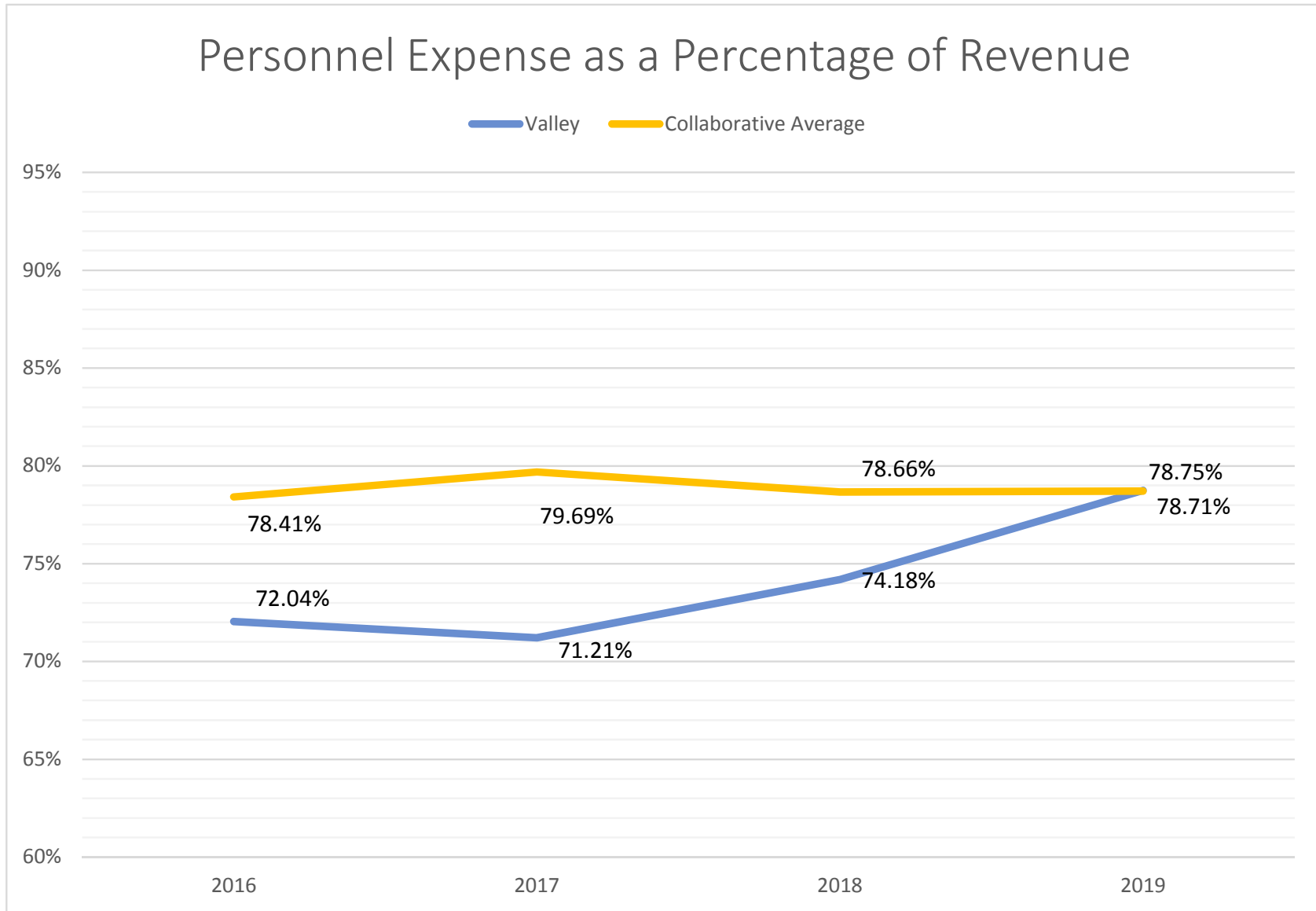
Chris A. Scott
Executive Director
Valley Collaborative

Valley Collaborative
Summary of Financial Activity
For the year ended June 30, 2019

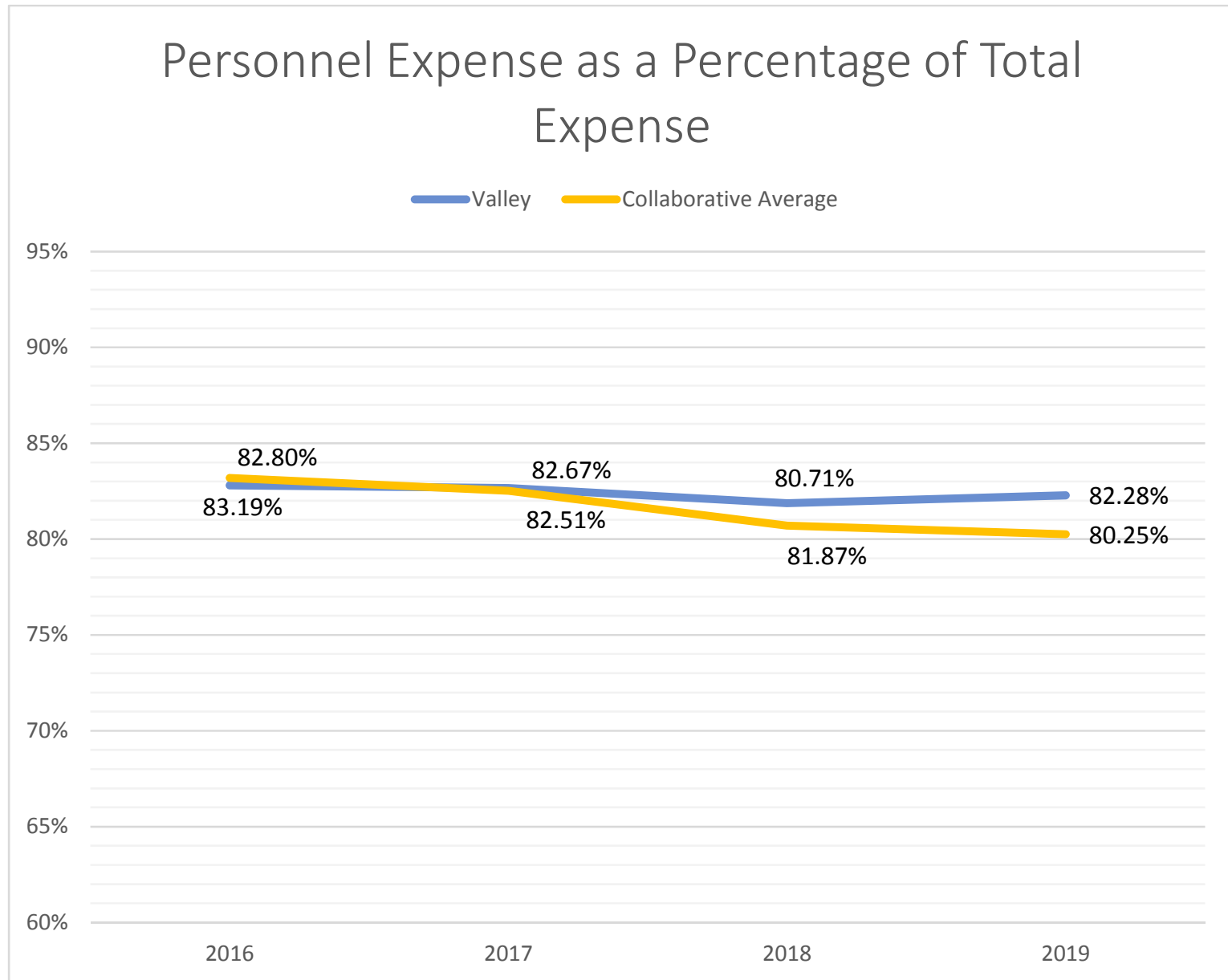


*Total expense includes administrative expense of the Collaborative. The Collaboratives administrative expense for the last four years have been:

2016 - \$1,934,406
 2017 - \$2,001,282
 2018 - \$1,903,951
 2019 - \$1,829,431

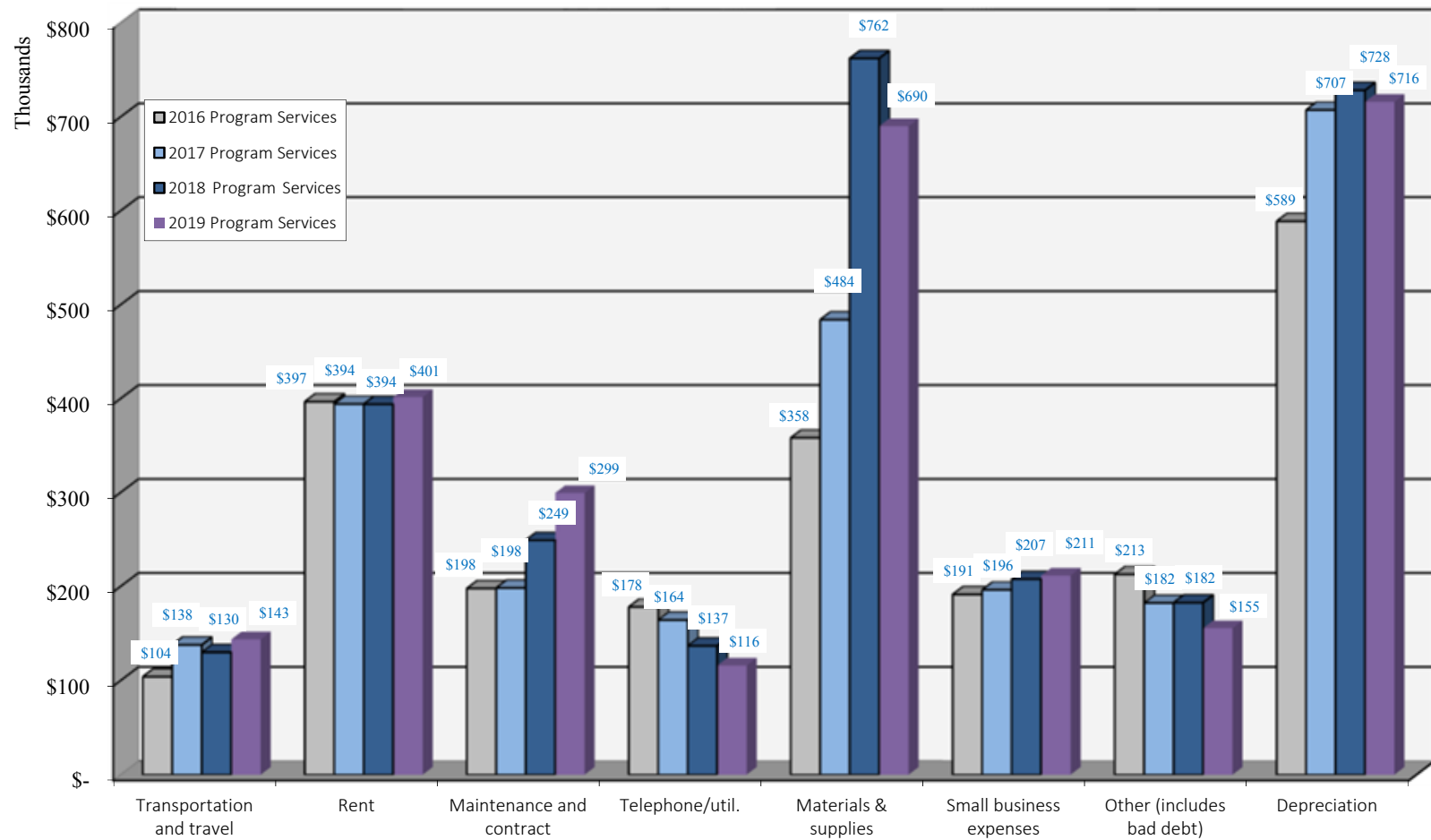


Derived from audited financial statements for discussion purposes only.

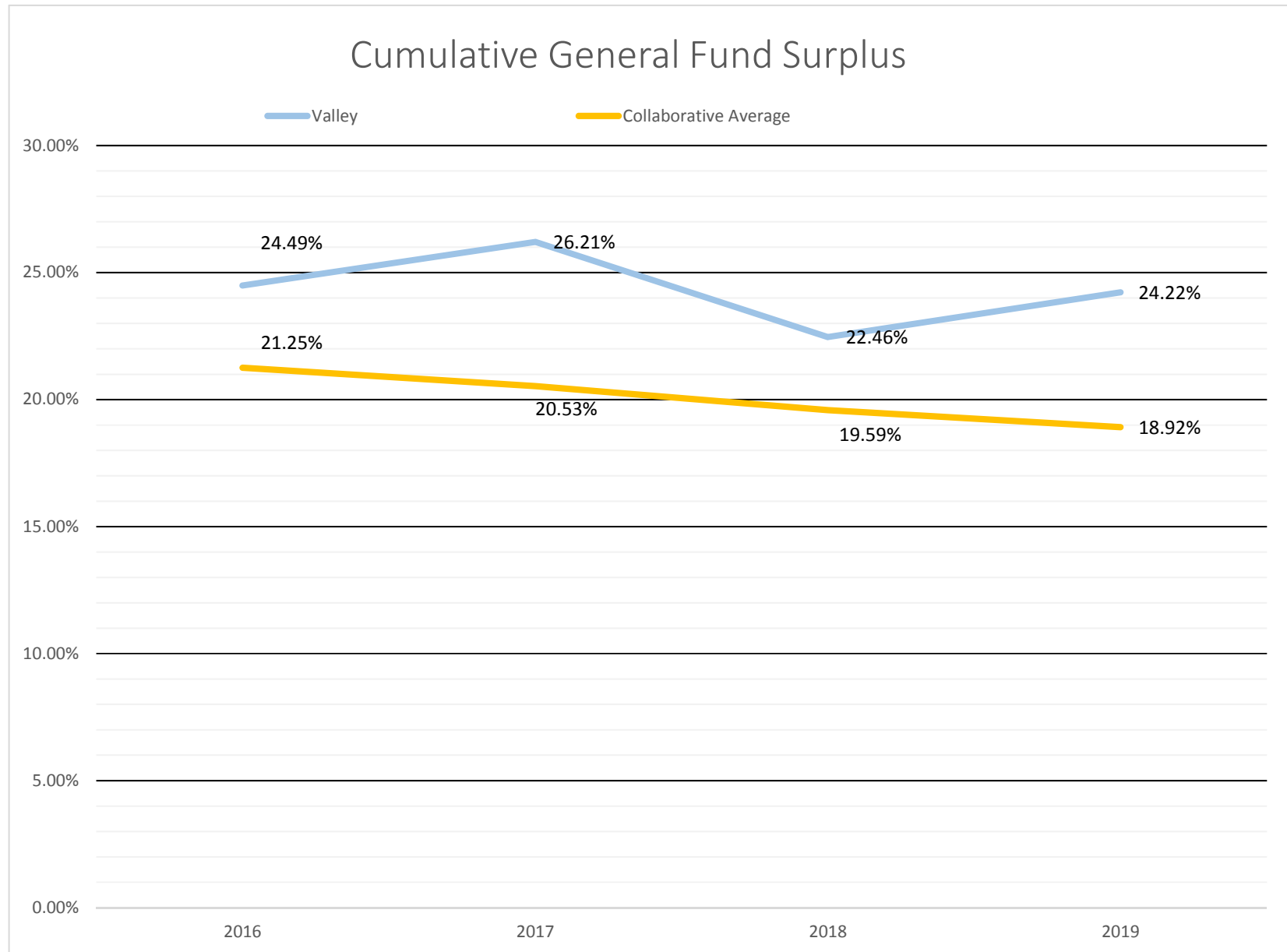


Derived from audited financial statements for discussion purposes only.

Program Expense Comparison (Excludes Payroll)



Derived from audited financial statements for discussion purposes only.



Derived from audited financial statements for discussion purposes only.

Programming Excellence

Our educational offerings continue to be celebrated throughout the region for being of the highest quality and the most reasonably priced. Our enriched programmatic offerings include:

- Enhanced sensory regulation equipment at the middle school
- Our greenhouse located at the elementary school will serve as an outdoor classroom engaging our students in STEM activities aligned with the science standards
- A robust experiential physical education program
- Community based learning opportunities
- Dual enrollment program with Middlesex Community College
- An afterschool recreational program
- State-of-the-art STEM technology to engage students in the curriculum
- Numerous vocational partnerships with local businesses and corporations

The Collaborative's annual play this year was "Willy Wonka Junior". If you have never seen one of the Collaborative's plays, it is an inspiring event and a very moving experience.

The work that we do at Valley is extremely rewarding and it is a privilege and an honor to serve this community.

Dr. Chris A. Scott
Executive Director
Valley Collaborative

Change(s) in Membership, Services, or Programs

None

Number of Years the Collaborative has been in Existence

Valley Collaborative was founded in 1976. It has been in existence for 43 years.

Revenue and Expenditure Information for the Subject Year

Please see full financial audit posted on the website for details.

Valley Collaborative
Statement of Net Position
June 30, 2019

Assets

Current Assets	
Cash and cash equivalents	\$ 5,439,436
Accounts receivable, net	1,136,006
Prepaid expenses and other assets	25,901
Cash held for municipalities	501,179
Total Current Assets	<u>7,102,522</u>
Non-current Assets	
Furniture, equipment, vehicles and leasehold improvements, net	<u>7,417,038</u>
Total Non-current Assets	<u>7,417,038</u>
Total Assets	<u>14,519,560</u>

Deferred Outflows of Resources

Deferred Outflows of Resources Related to OPEB	<u>2,279,552</u>
Total Assets and Deferred Outflows of Resources	<u>\$ 16,799,112</u>

Liabilities, Deferred Inflows and Net Position

Current Liabilities	
Accounts payable and accrued liabilities	\$ 680,714
Credits due to member districts	501,179
Total Current Liabilities	<u>1,181,893</u>
Non-current Liabilities	
Net OPEB liability	<u>2,252,415</u>
Total Non-current Liabilities	<u>2,252,415</u>
Total Liabilities	<u>3,434,308</u>

Deferred Inflows of Resources

Deferred Inflows of Resources Related to OPEB	<u>1,484,142</u>
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Net Position

Net Position	
Unrestricted	3,146,249
Restricted - contributions and other	17,375
Restricted - capital reserve fund	1,300,000
Invested in capital assets, net of related debt	7,417,038
Total Net Position	<u>11,880,662</u>
Total Liabilities, Deferred Inflows and Net Position	<u>\$ 16,799,112</u>

Valley Collaborative
Statement of Activities
For the year ended June 30, 2019

Functions/ Programs	Expenses	Program Revenues		Net (Expense) Revenue and Changes in Net Position
		Charges for Services	Operating Grants and Contributions	
Governmental Activities:				
Administration	\$ 1,869,333	\$ -	\$ -	\$ (1,869,333)
Education	16,693,942	17,124,975	2,909,657	3,340,690
Intergovernmental revenue and expense	3,709,658	-	3,709,658	-
Other postemployment benefits	965,329	-	-	(965,329)
Depreciation and amortization	715,782	-	-	(715,782)
Total Governmental Activities	\$ 23,954,044	\$ 17,124,975	\$ 6,619,315	\$ (209,754)
General Revenue and Other:				
Interest				60,945
Other				6,675
Credits to member districts				(500,000)
Total General Revenue and Other				(432,380)
Change in Net Position				(642,134)
Net Position, Beginning of Year				12,522,796
Net Position, End of Year				\$ 11,880,662

Valley Collaborative
Notes to Financial Statements
June 30, 2019

**NOTE L – DISCLOSURES REQUIRED UNDER MASSACHUSETTS GENERAL LAW C.40 § 4E -
continued**

Annual determination and disclosure of cumulative surplus

Cumulative Surplus Calculation - FY19				Page(s) in financial statements
(A)	Voted Cumulative Surplus as of 6/30/18		\$ 4,042,161	(A) p. 11
(B)	1 Amount of (A) used to support the FY19 Budget	(B)1	\$ -	
	2 Amount of (A) returned to member districts	(B)2	(\$ 500,000)	
	(B)1 + (B)2 = (B)		(\$ 500,000)	(B) p. 8
(C)	Unexpended FY19 General Funds		\$ 1,061,093	(C) p. 11
(D)	Cumulative Surplus as of 6/30/19 (A) - (B) + (C) = (D)		\$ 4,603,254	(D)
(E)	FY19 Total General Fund Expenditures*		\$ 19,004,149	(E) p. 11
(F)	Cumulative Surplus Percentage	(D) ÷ (E)	24%	(F)
	Estimated Amount of Excess Cumulative Surplus as of 6/30/19		-	

*Excludes intergovernmental expense, includes transfers to postemployment benefits trust and capital reserve fund, net of transfers to the general fund from the capital reserve.

Governance and Leadership

Board of Directors and Member Districts

The Valley Collaborative is governed by a Board of Directors comprising representatives from its nine member districts. The members of the Board of Directors in FY '19 were:

Chairperson Mr. Timothy Piwowar, Superintendent of the Billerica Public Schools
Dr. Michael Flanagan, Superintendent of the Tyngsborough Public Schools
Dr. Jay Lang, Superintendent of the Chelmsford Public Schools
Mr. Steven Stone, Superintendent of the Dracut Public Schools
Dr. Laura Chesson, Superintendent of the Groton-Dunstable Regional School District
Dr. Denise Pigeon, Superintendent of Nashoba Valley Technical School District
Mr. Brad Morgan, Superintendent of the North Middlesex Regional School District
Mr. Christopher Malone, Superintendent of the Tewksbury Public Schools
Mr. Everett (Bill) Olsen, Superintendent of the Westford Public Schools

Advisory Committee

Valley Collaborative's Board of Directors and District Planning Team currently act in an advisory committee role.

Staffing Information

Valley Collaborative employs Department of Elementary and Secondary Education licensed teachers. The Collaborative's other professional staff includes licensed speech and language pathologists, occupational therapists, physical therapists, social workers, guidance counselors, board certified behavior analysts, music therapists, psychologists and nurses. In addition, the Collaborative contracts the services of a physician and a psychiatrist.

Key Management and Program Staff

District Staff:

Dr. Chris A. Scott, Executive Director
Mr. Jim George, Accountant
Ms. Joia Mercurio was the Assistant Executive Director of Curriculum and Technology
Ms. Kari Morrin was the Director of Student and Adult Services and Human Resources
Ms. Jessica Scalzi, Lead Nurse

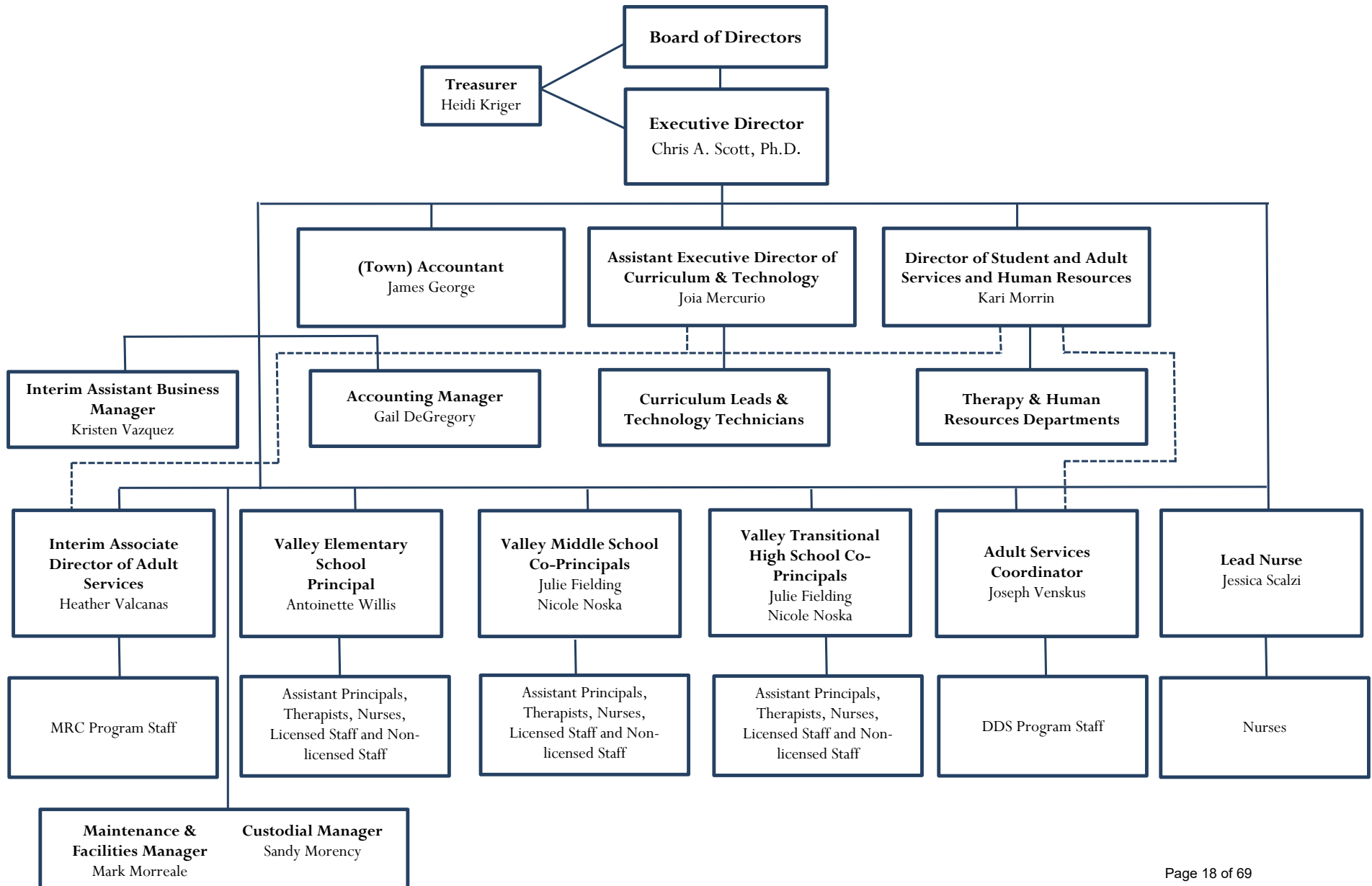
DESE Program Staff:

Ms. Antoinette Willis – Valley Elementary School
Ms. Jennifer Bergeron – Valley Elementary School
Ms. Nicole Noska – Valley Transitional Middle and High School – Transitional Programming
Ms. Julie Fielding – Valley Transitional Middle and High School – Alternative Programming

DDS/MRC Program Staff:

Mr. Joe Venskus – Adult Services Coordinator, Today and Tomorrow Program

Ms. Heather Valcanas, Associate Director of Adult Services



Programs and Services Provided

The Collaborative offers the following types of programs and services, which complement and augment the educational programs and services of the member districts in a cost-effective manner.

- Day school placements and other programs and services, including educational, therapeutic, transitional, and occupational programs and services for students and individuals with disabilities.
- Professional Development programs for general and special educators.
- Other appropriate services and programs as may be established and approved by the Board of Directors of the Collaborative.

The programs we are offering our students continue to support their academic, transitional, emotional, and behavioral progress. Our K-12 (up to 22 years of age) programs run September through June and offer additional summer programming. Valley's adult programs operate year round. In addition, the Collaborative feels it is important for our students to have state-of-the-art adaptive technology that enables them to fully engage in the curriculum. To support the mission, the Collaborative has recently upgraded its technology in all schools. The Collaborative is committed to offering high quality programs in a fiscally responsible manner. A student-focused budget with a mission to improve student outcomes is always more cost-effective than a budget disconnected from the mission.

2018-2019 Average Number of Students

Valley Collaborative served 418 student (K-12) during the 2018-2019 school year.

Program Offerings Overview

K-12 Programs:

Valley Elementary School
Valley Middle School
Valley Transitional High School

Adult Programs:

Valley's Today-and-Tomorrow Program
Valley's Massachusetts Rehabilitation Commission Funded Programs
Job Development

Valley Elementary School

135 Coburn Road, Tyngsborough, MA

Our Goal

Valley Elementary School's goal is to provide a school experience for every child.

Valley Elementary School provides a school experience for every child, in a supportive, therapeutic environment. We cater to students with a range of cognitive, language and learning disabilities, as well as those with executive functioning problems, Autism, mental health issues and behavior challenges. Students have access to literacy, math, language and writing as well as science and social studies at their individual

level. Our school utilizes experiential education to help students develop social skills, confidence and comfort with positive risk challenges. We also encourage families to participate in the school experience. Family events, volunteer opportunities and our Parent Advisory Group all provide a much-needed connection.

Autism Pragmatic Sensory classrooms are ABA designed to meet the needs of students diagnosed with Autism, as well as students with pragmatic, sensory or behavioral needs. We use a team approach to provide each student with individualized behavior and academic supports.

Emotional Behavior classrooms provide a therapeutic environment for students who have emotional, mental health, behavioral or social adjustment difficulties that may limit their ability to make progress in a traditional school setting. The classrooms use positive behavior support and collaborative problem solving to help students focus on school, develop relationships and build self-esteem. Our tailored approach and expert team ensure that every student has an individualized behavior and academic plan.

Valley Collaborative Elementary School is staffed by therapists and educators who've received extensive training in the most current research-based intervention strategies. Our integrated therapy approach utilizes behavior analysts, speech/language pathologists, occupational therapists, physical therapists, music therapists and social workers who work with the classroom staff to ensure that all of our students' needs are met.

After-school Programming

We offer a variety of after-school activities including community outings, recreation and social skills groups.

Parent Training

We also offer a parent training series that incorporates behavioral as well as social techniques to help parents help their children

Valley Middle School

40 Linnell Circle, Billerica, MA

Our Goal

Valley Middle School's goal is to prepare students for successful adult living.

The Valley Middle School provides a supportive, therapeutic environment, tailored to meet students' individual learning needs. Our school is staffed by trained professionals who help students discover their strengths, interests and abilities. Small class sizes, individual instruction and classroom technology keep students motivated and engaged. In addition to a rich curriculum, students also have access to programs, including:

- social skills group
- life skills training
- art education

- music therapy
- electives, including band, cooking, school spirit, creative arts, health and wellness
- community based activities
- field trips
- experiential physical education

Emotional Behavioral (EB) classrooms provide a therapeutic setting for students who have emotional, behavioral or social adjustment difficulties that may have kept them from making progress in a traditional school setting. EB classrooms are appropriate for students with a range of cognitive abilities or learning disabilities, as well as those with executive functioning or behavior challenges.

Autism Spectrum Disorder (ASD) classrooms provide services designed to meet the needs of students diagnosed with autism, as well as students with pragmatic, sensory or behavioral needs. The classrooms provide consistency, positive reinforcement and individual behavior support plans, as needed.

The Interim Alternative Education Setting (IAES) 45-Day Assessments allow our skilled professionals to assess what kinds of supports and therapeutic approaches will best help students meet their educational goals.

Valley Transitional High School

40 Linnell Circle, Billerica, MA

Our Goal

Valley Transitional High School's goal is to prepare students to become successful members of their communities.

Valley Transitional High School provides a supportive, therapeutic environment that assists students with their social, emotional, behavioral and academic needs. We seek to instill our students with the confidence and ability to successfully earn a high school diploma, transition into the workplace or a post-graduate program.

Valley Transitional High School classrooms provide a therapeutic setting for students who have social, emotional, behavioral or academic needs. Students develop transitional skills so that they are prepared to successfully enter college and the working world after graduating from high school. We offer a trusting, structured and safe environment that allows students to give and receive productive feedback from their peers, and encourages them to make positive choices. Students attend small classes taught by trained educators who use individualized instruction, state-of-the-art technology and innovative instructional strategies to engage and motivate them.

The Intensive Special Needs classroom provides comprehensive services to students with moderate to intensive physical, developmental and intellectual impairments. Our specialized instruction and expert staff is able to meet the needs of individual students. The curriculum focuses on academics, vocational, social and life skills.

Vocational Opportunities

Students have a variety of opportunities to develop vocational skills, including: culinary, woodshop, landscaping, and car detailing. We collaborate with local businesses and community groups to offer students the knowledge and work experience they will need for employment. Students can also participate in internships in the surrounding community, or with the Massachusetts Laborers Union. Community service opportunities allow students to develop a positive self-identity through volunteering.

Additional Programming

The Experiential Physical Education program gives students the opportunity to take positive risks and challenge themselves in order to develop leadership and problem solving abilities, along with communication skills. Community service opportunities allow students to develop a positive self-identity through volunteering. Eligible students who are on track to graduate and in solid academic standing may also participate in dual enrollment and work study programs.

Contract Services

Valley Collaborative provides a contract service to those districts in need. A contract service is a service that a district needs in their own district and is not provided to a student enrolled in a Valley Collaborative program and can include but is not limited to:

- Therapy (Speech, Occupational & Physical)
- Reading Specialist
- Transition Specialist
- Augmentative and Alternative Communication Specialist
- Social Work
- ABA Therapist
- Board Certified Behavior Analyst
- Tutoring
- One-on-one Transitional Aide
- One-on-one Behavioral Aide
- One-on-one Nurse
- Restraint Training

A Valley Collaborative Member or Non-Member District may also contract with Valley Collaborative for an assessment for a non-valley student. The contract services assessments available to districts include:

- Speech Language Evaluation
- Occupational Therapy Evaluation
- SIPT Assessment
- Sensory Integration & Praxis Test – 17 subtests
- Physical Therapy Evaluation
- Functional Behavioral Assessment
- Functional Vocational Evaluation(V5)
 - Sensory-motor · Strengths
 - Gross & Fine Motor · Preferences and Interests
 - Coping/Adaptive Behavior · Work adjustment and Job readiness

- Autonomous Living
- Learning Style
- Student Observation
- Transition Assessment (V10)
- V5 and:
 - Adaptive Living · Transition
 - Self –Determination · Social
 - Employability · Person-Centered Planning
- Observational Assessment
- Cognitive/Intelligence Testing

Adult Services

25 Linnell Circle, Billerica, MA

Our Goal

Valley Collaborative’s Adult Services goal is to support our adult community in reaching lifelong goals.

Our Adult Services focuses on building a community that promotes individuality, independence and community inclusion. Valley Collaborative believes in a person-centered approach that provides supports in order to help our community of adults realize maximum independence, rewarding experiences, diverse vocational opportunities and continual growth.

Today & Tomorrow

Valley’s Today and Tomorrow program, funded by the Department of Developmental Services (DDS), helps adults identify and attain their goals regarding involvement in personal or community activities and work status.

Valley’s Massachusetts Rehabilitation Commission Funded Programs

Valley’s Evaluation and Training program, funded through the Massachusetts Rehabilitation Commission (MRC), assists individuals in preparing for and obtaining competitive employment. Valley’s Supported Work program, funded through MRC, provides long-term supports to adults who have obtained employment through MRC.

Job Development

Valley Collaborative’s job development team has over 100 years combined experience in building community business partnerships and working to assist people with disabilities find and secure competitive and supported employment. Some of the services we provide include:

- Assessment
- Individual supported employment
- Skills training

- Group supported employment
- Job placement
- Community-based day supports
- Initial, interim, and ongoing job supports
- Volunteer opportunities
- Job development
- Job coaching

Therapeutic Services

Most of Valley's students receive one or more therapeutic services.

Occupational Therapy, Speech Language Therapy, Physical Therapy, and Behavioral Analysis

The therapist(s) role in the Collaborative is to provide services to students through an integrated therapy model, which research supports as the most effective manner to provide services. Team collaboration is at the heart of the integrated therapy model. The team works together for the functional independence and success of the students. The team arrives at a shared set of goals for the students and implementation occurs across the routines of the day.

Using this model, therapists work with students within the classroom environment and during naturally occurring routines and activities. This helps reduce the student's need to generalize skills from a clinical or "pull out" model to realistic situations that occur with the classroom and school environments. It also increases opportunities for peer modeling and frequent practice of targeted objectives. Various therapists may also be in the classroom for the same block of time to "co- treat" or implement strategies that draw on their combined expertise.

This model also includes consultation, program monitoring, and staff training. Therapists train teaching staff to extend therapeutic interventions into classroom activities and other ongoing activities that occur throughout the student's day. The therapists determine recommendations for service delivery, develop IEP goals and benchmarks specific to discipline, actively engage members of the multidisciplinary team to best meet student's needs, consult with staff and other professionals to ensure generalization of newly learned skills, and implement staff training and parent education.

Areas of Assessment and Treatment

Occupational Therapy:

- Handwriting skills and keyboarding
- Fine motor skills
- Activities of daily living(ADL's)
- Visual motor skills
- Visual perceptual skills
- Motor planning skills
- Sensory processing skills
- Upper extremity function
- Environmental modification
 - Upper extremity coordination

- Sensory integration assessments
- Life skills

Speech Language Pathology:

- Pragmatics
- Speech sound production
- Resonance
- Phonology
- AAC
- Swallowing/feeding
- Voice
- Fluency
- Expressive and receptive language
- Cognition and executive functions
- Syntax and grammar
- Pro-social skills

Physical Therapy:

- Functional mobility
- Positioning to promote optimal participation
- Gross motor skills and motor planning
- Equipment assessment (wheelchairs, walkers, seating)
- Tonal inhibition and facilitation
- Posture
- Range of motion and strengthening
- Vendor consultation
- Orthotics management
- Core stability and strengthening

Board Certified Behavioral Analysis:

- Behavior support plans
- Functions of behavior
- Staff training
- Reinforce and motivation assessment
- Representation of graphs for data
- Data collection systems
- Discrete trial planning
- Parent training
- Skills assessments

Counseling and Social Work

A supportive therapeutic environment is an essential component of the student's overall experience at Valley. Valley's clinical component addresses student's social, emotional, developmental, and behavioral needs. The clinical team, in conjunction with the teaching staff, BCBAs, speech and language therapists, occupational therapists, and physical therapists, identifies student's individual needs and addresses them through various approaches. Such approaches facilitate the development of self-awareness with the main

objective to promote overall wellness and assist each student in reaching his/her full potential. The clinical team provides individual, group, and milieu counseling as well as crisis intervention and consultation to staff. They also provide a variety of assessments and participate in IEP meetings. Regular communication with family and outside providers and specialists is essential to maximizing a student's complete educational and therapeutic experience. Valley's clinical team is comprised of Massachusetts DESE certified school social workers, and guidance counselors. Social workers also hold a Massachusetts state board license as either an LICSW or LMHC.

Medical Services

The nursing staff at Valley functions as part of the multidisciplinary team. It is our goal to promote the health, safety, and well-being of our students, as well as intervene with actual and potential health and behavioral health issues. In addition, when necessary, we manage complex medical issues and provide case management services. Our nurses network with others to build student and family capacity for adaptation, optimal independence, self-advocacy, and to build community alliances. We are a multifaceted group that provides professional nursing services to students to enhance their well-being, academic success, and lifelong achievement. Along with the educational advancement of our students, the nurses at Valley are active in their own professional growth and are actively engaged with other professional organizations.

All Collaborative students benefit from medical assistance as required and/or stipulated by his/her IEP. The Collaborative is in compliance with Massachusetts DESE and Massachusetts Department of Public Health regulations and employed a full- time Registered Lead Nurse. In addition, the Collaborative employs a nurse at each site and has a float nurse.

Assessment Services

Interim-Alternative Education Setting – 45-Day Assessment Program

Valley's 45-day assessments assist in determining interventions that will aid students with increasing his/her ability to perform successfully within an educational setting. The program also addresses the therapeutic needs of each student. Psychosocial needs are accessed via formal and informal assessments, while utilizing a holistic approach.

At, or before, the end of the 45 days, a written report is presented at a team meeting where intervention strategies are discussed, as well as descriptions of the type of educational setting that will best meet the student's needs.

Augmented and Alternative Communication Services and Evaluations

Our Goal-to provide expert AAC evaluation and support for students, parents and staff in order to facilitate student communication. Augmentative and alternative communication (AAC) includes all forms of communication (other than oral speech) that are used to express thoughts, needs, wants, and ideas. Laura Badger, M.S. CCC-SLP is a Speech- Language Pathologist who specializes in augmentative and alternative communication (AAC) and language development for AAC users. Laura has presented regionally and nationally on a variety of topics specific to AAC, technology and language development for students with complex communication needs.

Valley Collaborative provides comprehensive AAC evaluations at competitive rates. Our expert team can determine student needs and determine a plan of action, while providing ongoing support for students and staff beyond the evaluation period. AAC evaluations, direct therapy and consultative services are provided by certified speech-language pathologists. Valley offers:

- 30 day evaluation period
- Skilled observation, assessment and recommendations
- Implementation
- AAC device trials
- Technology assistance
- Ongoing support and consultation

Sensory Integration Praxis Test

A Sensory Integration Praxis Test (SIPT) is a comprehensive evaluation of a child's sensory systems that explores and explains the under-lying neurological processes that are at the root of the presenting problems. The SIPT evaluation is designed to use with children who are at least 4 years old through 8 years 11 months, although can be used with older children. The student must have the ability to attend to and respond to testing. Allyson Melanson, M.S., OTR/L is an occupational therapist with numerous years of experience working as a school based occupational therapist who specializes in sensory integration. She has completed specialized training in sensory integration and is certified to administer the SIPT battery.

The following is a list of presenting problems that often lead to a referral for a SIPT:

- Difficulties with developmentally-appropriate organizational skills
- Difficulty with initiation
- Difficulties performing developmentally-appropriate and school related self-care skills
- Less than developmentally-appropriate time on task

The SIPT battery includes the following 17 tests and can be given in 2 – 4 hours, over two sessions. Additionally, any one of the individual tests can be administered separately in approximately 10 minutes:

- Space Visualization
- Figure-Ground Perception
- Standing/Walking Balance
- Design Copying
- Postural Praxis
- Bilateral Motor Coordination
- Praxis on Verbal Command
- Constructional Praxis
- Localization of Tactile Stimuli
- Postrotary Nystagmus
- Motor Accuracy
- Sequencing Praxis
- Oral Praxis
- Manual Form Perception
- Kinesthesia
- Finger Identification

- Graphesthesia

Transition Services and Assessments

Valley's goal with transition services is to help students make successful transitions to life beyond school. Students who are transitioning from school to employment and community benefit from a variety of resources and support. Valley Collaborative provides a comprehensive approach to helping students, families, and school districts navigate the transition process. Valley's transition services are age appropriate and highly individualized. Our transition specialist, Karen Rowe, M.Ed. is a DESE licensed special educator who specializes in transition services. She has an extensive background in vocational services, serving both students and adults. Karen has presented regionally on topics related to transition services in special education. She has developed transition tools, assessments, and individualized programming for students with a wide range of strengths and needs.

Transitioning to Employment and Life after School

Valley's expert transition specialist helps students transition to the fullest life possible after school, including appropriate employment and/or independent living. Our transition assessment process begins by assessing student readiness for the workplace and/or pre-vocational training including interests, skills, intellectual functioning, sensory and motor abilities, coping/adaptive behavior, employability and "soft skills." Valley also offers planning assistance for students transitioning to post-secondary education. Valley's transition specialist assesses the attributes and "soft skills" associated with self-determination including personal strengths, work preferences, self-advocacy, self-regulation, autonomy and psychological empowerment. For students moving towards independent living, Valley provides assessments of transition skills, adaptive living skills, social skills and leisure skills.

Assisting Districts

Valley's expert staff and extensive resources enable us to provide districts with an ongoing, tiered set of transition services. Valley's transition services streamline the transition process and assist districts in meeting the guidelines set forth in IDEA indicator 13 of the U.S. Department of Education, Office of Special Education programs State Performance Plan Indicators. In addition to assessments, Valley offers consultation, professional development, job coaching, and job development to districts.

Other Assessments Offered

- Complete Vocational Assessment Battery (McCarron Dial Systems)
- Valley Assessment of Social, Transitional, & Employment Readiness Skills (M.A.S.T.E.R.S. Assessment)
- Cognitive/Intelligence Testing – Three Year Evaluations

Vocational Services

Our goal is to provide an environment that gives students and adults the opportunity and support to explore and reach their academic and vocational potential. Business services we provide are catering, auto-detailing, mail delivery services, assembly tasks, janitorial services, recycling, shipping and receiving, and landscaping. Valley's vocational services offer staffing solutions by providing interns, volunteer services, supervised job

crews, qualified personnel, job coaching supports, and customized services to fit the needs of businesses and employers alike.

Professional Development

The Valley Collaborative offers a limited array of professional development. The professional development is primarily directed to our staff and in some instances includes staff from its member districts. The exception is professional development in the areas of restraint training and workshops provided through the Northeast Professional Educator Network (NPEN).

Valley Collaborative is a proud member district of the Northeast Professional Educator Network (NPEN). This network is comprised of approximately twenty-five school districts in the Merrimack Valley whose joint vision is to “maximize regional resources to provide high-quality, inter-district professional development, fostering a culture of collaborative inquiring in order to improve student learning.”

Cooperative Purchasing

The Collaborative does not offer cooperative purchasing but participates in it.

Joint Transportation

The Collaborative does not offer joint transportation but participates in it.

Medicaid Billing

The Collaborative does not offer Medicaid billing services but participates in it.

Outreach and Partnerships

Member School Districts

Communication and outreach are key to our success. An annual member district meeting is held in January to review the Annual Report and the Collaborative financials. Member district Superintendents, School Committee Members, Business Directors, Special Education Directors, and members of the public are invited to attend. In addition, the Collaborative hosts periodically a meeting for all its member districts’ Special Education Directors. Each meeting has a working agenda of issues we need to collaborate on to better serve our students. Furthermore, the Executive Director meets with member districts and School Committee members to inform them of the progress we are making at the Collaborative, to present financial updates and to obtain various approvals when necessary.

Community-at-large Outreach

The Collaborative also publishes a quarterly Newsletter which is sent to more than 500 families and state officials, agencies, and businesses. In addition, each school publishes its own Newsletter. If you would like to be on the distribution list, please contact us.

The Collaborative has a newly developed website: www.valleycollaborative.org

The Valley Collaborative has implemented the Massachusetts Dual Enrollment Program and enrolls students with disabilities at the Middlesex Community College. The Dual Enrollment Program at the Collaborative serves students with moderate and severe disabilities, and supports college and career success through the provision of a free and appropriate public education in the least restrictive environment. The program:

- Promotes and enhances academic, social, functional, integrated competitive employment skills, and other transition-related goals;
- Provides opportunities for the inclusion of students with moderate and severe disabilities in credit and non-credit courses alongside their non-disabled peers;
- Promotes participation in the student life of the college community.

Cost-Effectiveness of Programs and Services

Please note, Valley Collaborative prides itself in providing its member districts with superb special education programming for its out-of-district students as well as limited contracted services support.

In line with Valley's focus on its on member districts, Valley has chosen to set its non-member district contracted services rates higher for students not enrolled at Valley. It should also be noted that in 2012, the Valley Board of Directors voted to include the cost of therapies in the tuition rates for both member and non-member districts. Therefore, the comparison data reflected in the Therapeutic Services rate sheet does not reflect the cost savings associated with the therapy costs being included in the tuition rates. Cost savings for member districts in FY'19 was \$1,223,598 and non-member was \$1,317,172 – total for both member and non-member districts - \$2,540,770. Also, Valley includes free breakfast and lunch in its tuition rates. This is another cost savings to districts and families worth approximately \$380,000 (based on 300 students x 210 days x \$6 for breakfast and lunch = \$380,000). Valley is not aware of other collaboratives offering this benefit.

Furthermore please note, tuition rates were compared based on program descriptions. Given the differences among programs and services, a proper cost effective analysis is almost impossible without requiring full disclosure of student to staff ratio per program and transparency on the therapies included in the cost of a tuition rate. I would be happy to discuss how a cost effective analysis could be more meaningful and accurate if the proper data points were made public.

	*FY20 Private Schools Average	Member District Per Diem Tuition	Member District Per Diem Savings	Member District Percent Cost Savings	Non- Member District Per Diem Tuition	Non- Member District Per Diem Savings	Non- Member District Percent Cost Savings
Intensive Special Needs (ISN)	\$496.69	\$294.00	\$202.69	41%	\$366.50	\$130.19	26%
Elementary School – Emotional Behavioral Program (EBS)	\$427.75	\$216.00	\$211.75	50%	\$271.50	\$156.25	37%
Elementary School – Autism Spectrum Disorder Program (ASD)	\$427.75	\$240.00	\$187.75	44%	\$301.50	\$126.25	30%
Middle School - Emotional Behavioral Program (EBS)	\$406.21	\$216.00	\$190.21	47%	\$271.50	\$134.71	33%
Middle School – – Autism Spectrum Disorder Program (ASD)	\$406.21	\$240.00	\$166.21	41%	\$301.50	\$104.71	26%
School and Vocational Training	\$419.95	\$156.00	\$263.95	63%	\$197.50	\$222.45	53%
School and Life Skills Training	\$430.93	\$179.00	\$251.93	58%	\$232.50	\$198.43	46%
School and Life Skills Training ISN	\$420.11	\$240.00	\$180.11	43%	\$301.50	\$118.61	28%
School to Work Program*		\$179.00		N/A	\$226.50		N/A
High School - Alternative	\$424.92	\$166.00	\$258.92	61%	\$210.50	\$214.42	50%
High School - Alternative Vocational*		\$179.00		N/A	\$226.50		N/A

*See table on following page which list tuition rates for the ten private schools used for the “Average” calculations.

	*FY20 Boston Higashi School	*FY20 Cotting School, Inc.	*FY20 Franciscan Children's Hospital	*FY20 Landmark Foundation	*FY20 Lighthouse School	*FY20 May Institute	*FY20 Nashoba Learning Group, Inc.	*FY20 New England Center for Children	*FY20 Seven Hills Foundation, Inc.	*FY20 League School of Boston	*FY20 Private Schools Average
Intensive Special Needs (ISN)			\$453.12					\$540.26			\$496.69
Elementary School – Emotional Behavioral Program (EBS)	\$362.84	\$446.90			\$485.10	\$506.66	\$515.00		\$199.63	\$478.15	\$427.75
Elementary School – Pragmatic, Sensory, & Behavior Program	\$362.84	\$446.90			\$485.10	\$506.66	\$515.00		\$199.63	\$478.15	\$427.75
Middle School - Emotional Behavioral Program (EBS)	\$362.84	\$446.90				\$506.66	\$515.00		\$199.63		\$406.21
Middle School - Pragmatic, Sensory, & Behavior Program	\$362.84	\$446.90				\$506.66	\$515.00		\$199.63		\$406.21
School and Vocational Training		\$446.90	\$453.12		\$485.10		\$515.00		\$199.63		\$419.95
School and Life Skills Training	\$362.84	\$446.90	\$453.12		\$485.10	\$506.66	\$515.00		\$199.63	\$478.15	\$430.93
School and Life Skills Training ISN	\$362.84	\$446.90	\$453.12		\$485.10		\$515.00		\$199.63	\$478.15	\$420.11
School to Work Program*											
High School - Alternative				\$311.51	\$485.10					\$478.15	\$424.92
High School - Alternative Vocational*											

Valley Collaborative
Statement of Net Position
June 30, 2019

Assets

Current Assets	
Cash and cash equivalents	\$ 5,439,436
Accounts receivable, net	1,136,006
Prepaid expenses and other assets	25,901
Cash held for municipalities	501,179
Total Current Assets	<u>7,102,522</u>
Non-current Assets	
Furniture, equipment, vehicles and leasehold improvements, net	<u>7,417,038</u>
Total Non-current Assets	<u>7,417,038</u>
Total Assets	<u>14,519,560</u>

Deferred Outflows of Resources

Deferred Outflows of Resources Related to OPEB	<u>2,279,552</u>
Total Assets and Deferred Outflows of Resources	<u>\$ 16,799,112</u>

Liabilities, Deferred Inflows and Net Position

Current Liabilities	
Accounts payable and accrued liabilities	\$ 680,714
Credits due to member districts	501,179
Total Current Liabilities	<u>1,181,893</u>
Non-current Liabilities	
Net OPEB liability	<u>2,252,415</u>
Total Non-current Liabilities	<u>2,252,415</u>
Total Liabilities	<u>3,434,308</u>

Deferred Inflows of Resources

Deferred Inflows of Resources Related to OPEB	<u>1,484,142</u>
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Net Position

Net Position	
Unrestricted	3,146,249
Restricted - contributions and other	17,375
Restricted - capital reserve fund	1,300,000
Invested in capital assets, net of related debt	7,417,038
Total Net Position	<u>11,880,662</u>
Total Liabilities, Deferred Inflows and Net Position	<u>\$ 16,799,112</u>

Valley Collaborative
Statement of Activities
For the year ended June 30, 2019

Functions/ Programs	Program Revenues			Net (Expense) Revenue and Changes in Net Position
	Expenses	Charges for Services	Operating Grants and Contributions	
Governmental Activities:				
Administration	\$ 1,869,333	\$ -	\$ -	\$ (1,869,333)
Education	16,693,942	17,124,975	2,909,657	3,340,690
Intergovernmental revenue and expense	3,709,658	-	3,709,658	-
Other postemployment benefits	965,329	-	-	(965,329)
Depreciation and amortization	715,782	-	-	(715,782)
Total Governmental Activities	<u>\$ 23,954,044</u>	<u>\$ 17,124,975</u>	<u>\$ 6,619,315</u>	\$ (209,754)
General Revenue and Other:				
Interest				60,945
Other				6,675
Credits to member districts				<u>(500,000)</u>
Total General Revenue and Other				<u>(432,380)</u>
Change in Net Position				(642,134)
Net Position, Beginning of Year				<u>12,522,796</u>
Net Position, End of Year				<u>\$ 11,880,662</u>

Valley Collaborative
Notes to Financial Statements
June 30, 2019

NOTE L – DISCLOSURES REQUIRED UNDER MASSACHUSETTS GENERAL LAW C.40 § 4E -
continued

Annual determination and disclosure of cumulative surplus

Cumulative Surplus Calculation - FY19				Page(s) in financial statements
(A)	Voted Cumulative Surplus as of 6/30/18		\$ 4,042,161	(A) p. 11
(B)	1 Amount of (A) used to support the FY19 Budget	(B)1	\$ -	
	2 Amount of (A) returned to member districts	(B)2	(\$ 500,000)	
	(B)1 + (B)2 = (B)		(\$ 500,000)	(B) p. 8
(C)	Unexpended FY19 General Funds		\$ 1,061,093	(C) p. 11
(D)	Cumulative Surplus as of 6/30/19 (A) - (B) + (C) = (D)		\$ 4,603,254	(D)
(E)	FY19 Total General Fund Expenditures*		\$ 19,004,149	(E) p. 11
(F)	Cumulative Surplus Percentage	(D) ÷ (E)	24%	(F)
	Estimated Amount of Excess Cumulative Surplus as of 6/30/19		-	

*Excludes intergovernmental expense, includes transfers to postemployment benefits trust and capital reserve fund, net of transfers to the general fund from the capital reserve.

Valley Collaborative's District Improvement Plan

Designed to achieve the Purpose and Objectives set forth in the Collaborative Agreement

2015-2020

Plan Overview

Valley Collaborative's Articles of Agreement ARTICLE II Mission, Objectives, Focus, and Purpose	
<p>The mission of the Collaborative is to conduct educational programs and/or services for member districts in a cost-effective manner and to increase educational opportunities and to improve educational outcomes for its students. The purpose of the Collaborative is to provide high quality intensive educational, therapeutic and transitional programs and related services to individuals with disabilities referred by member districts, non-member districts and social service agencies, including both children and adults, and to provide professional development to educators. The focus of the Collaborative is the provision of special education, transitional, occupational, and therapeutic programs and services in the least restrictive environment and comprehensive professional development within the local communities of the member districts. The overall objectives of the Collaborative include improving the academic achievement and/or occupational skills of students and individuals with disabilities in the least restrictive environment through high quality programs and services; offering a variety of high quality professional development opportunities to general and special education teachers and related service providers; and offering its programs and services in a cost-effective manner.</p>	
<i>Mission</i>	
To work collaboratively to create a structured learning environment that empowers individuals to lifelong learning and to navigate confidently and with optimal independence in their community.	
<i>Vision</i>	
Valley Collaborative partners with families, districts, and the community to provide innovative programming that empowers students and adults to discover their individual strengths, interests, and abilities. In doing so, students become responsible contributing members of society.	
<i>Theory of Action</i>	
<p><i>If we...</i></p> <ul style="list-style-type: none"> ● Identify students' immediate and long-term individualized goals, strengths, and needs and provide support to meet them, and... ● Build the capacity of, and invest in, our staff, and... ● Invest in community building across the Collaborative, with all stakeholder groups, <p><i>Then we will...</i></p> <ul style="list-style-type: none"> ● Increase student independence and prepare students for successful post-secondary placement and adult living ● Increase staff professional capacity and the retention of certified staff ● Improve the engagement of all stakeholders in the Collaborative community 	
<p>Status Key</p> <p>Completed: Benchmark action taken, no further action is required.</p> <p>Met: Demonstrated proficiency of criteria or standard.</p> <p>Ongoing: Benchmark action taken and will be monitored periodically as indicated.</p> <p>In Progress: Benchmark is in the process of being worked on.</p>	

Strategic Objectives		
<i>1. All students and adults will be prepared for successful adult living</i>	<i>2. Valley Collaborative will provide professional development to build capacity and retain high quality staff</i>	<i>3. Valley Collaborative will foster a sense of belonging and engagement in the Collaborative community for all stakeholders (students, adults, families, staff, districts, community partners)</i>
Strategic Initiatives		
<i>a.) Develop and Implement Common Core and Job Skills Curriculum</i> Functional academics, job development and training	<i>a.) Provide Content-specific PD in Technology</i>	<i>a.) Provide Team Building for Students</i> Develop appropriate activities to establish commitment and respect for learning goals
<i>b.) Improve Transition Planning</i> Earlier assessment and communication; explore post-secondary options; travel training; community resources	<i>b.) Build Capacity Through Induction and Mentor Programs for Educators and Leaders, and Provide Leadership Opportunities</i>	<i>b.) Maintain Community Involvement</i> Identify and develop Valley Collaborative facilitated events with the purpose of maintaining community involvement for students, adults, and community partners
<i>c.) Build Independence Through Community Activities</i> Role play and real life situations; vocational activities; practicing life skills	<i>c.) Provide PD Choice: Half Days</i>	<i>c.) Increase District Participation in Advisory Board Meetings</i> Communication; forecasting potential students and programs
<i>d.) Build Self Advocacy Skills</i> Encourage communication w/ peers, staff, employers, worksites, and connect the communication with natural outcomes	<i>d.) All staff: Participants evaluate professional development offerings.</i>	<i>d.) Increase and Maintain Student and Family Communication</i> Parent orientation; invite and inform; current events; website; email
<i>e.) Self Actualization:</i> Create programming that promotes growth towards self-actualization for students and adults	<i>e.) Establish Professional Learning Communities</i>	<i>e.) Develop and Share Best Practices</i> School and Collaborative-wide; Internal transition planning; communication
<i>f.) Track student's/adult's progress on their annual IEP/ISP goals</i>	<i>f.) Network to provide Opportunities to Work Collaboratively with School Districts and Collaboratives in the Northeast</i>	
<i>g.) Administer Independence survey</i>		
<i>h.) Track Post-secondary Plan/Placement</i>		
Outcomes		
1.1 By the 2019-2020 school year, each Valley student/adult who has been enrolled for a year or longer will receive a 'met' rating on his/her IEP/ISP goals a minimum of 70% of the time.	2.1 Professional Development opportunities will receive an overall rating of "very good" on feedback evaluation forms 80% of the time by year five.	3.1 A minimum of one engagement initiative conducted annually, demonstrated through an artifact, targeting each group – students, adults, families, staff, districts, and community partners.
1.2 During the 2016-2017 school year, the Independence Survey will show a 10% increase in greater independence on the student's IEP/ISP goals	2.2 50% of certified staff will still be employed at Valley Collaborative by the end of year 3 of this plan.	3.2 Participation in Community Involvement events will remain steady or increase by 10%.
1.3 By the 2019-2020 school year, 90% of Valley graduates will be entering a college, state agency program, and/or other career track.		

Action Plan

Strategic Objective:

- 1.) All students and adults will be prepared for successful adult living

Initiative:

- 1a.) *Develop and implement common core and job skills curriculum* – Functional academics, job development and training

Monitoring Progress:

Process Benchmark for Initiative 1a	Person Responsible	Date	Status
Develop curricula Teams	Karen Rowe, Transition Specialist	Winter 2015	Completed
Inventory curricula products	Karen Rowe, Transition Specialist	Spring 2016	Completed
Assess curricula strengths and areas needing further development through data analysis	Karen Rowe, Transition Specialist	Fall 2016	Completed
Make recommendations as appropriate	Karen Rowe, Transition Specialist	Fall 2016	Completed
Develop a program of studies for grades 9-12 (Valley Transitional High School – Sites 1 & 2)	Math/English Dept. Heads	Winter 2016	Completed

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 1a	Person Responsible	Date	Status
Attendance at Curriculum meetings	Karen Rowe, Transition Specialist	Winter 2016	Completed
Upload inventory on shared/Google drive	Karen Rowe, Transition Specialist	Winter 2016	Completed
Create final recommendations/proposals	Karen Rowe, Transition Specialist	Winter 2016	Completed
Review and adjust program of studies	Karen Rowe, Transition Specialist	Winter 2016	Completed

Monitoring Progress:

Process Benchmark for Initiative 1a	Person Responsible	Date	Status
Develop Assessment Teams	Karen Rowe, Transition Specialist	November 2015	Completed
Inventory assessments products	Karen Rowe, Transition Specialist	Spring 2016	Completed
Assess assessment strengths and areas needing further development	Karen Rowe, Transition Specialist	Fall 2016	Completed
Make recommendations as appropriate	Karen Rowe, Transition Specialist	Fall 2016	Completed

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 1a	Person Responsible	Date	Status
Attendance at Assessment meetings	Karen Rowe, Transition Specialist	Winter 2016	Completed
Upload inventory on shared drive	Karen Rowe, Transition Specialist	Winter 2016	Completed
Create final recommendations and proposal to purchase new materials if needed	Karen Rowe, Transition Specialist	Winter 2016	Completed

Strategic Objective:

- 1.) All students and adults will be prepared for successful adult living

Initiative:

- 1b.) Improve transition planning; earlier assessment and communication; explore post-secondary options; travel training; community resources

Monitoring Progress:

Process Benchmark for Initiative 1b	Person Responsible	Date	Status
Implement Career Cruising curriculum in middle school and high school	Karen Rowe, Transition Specialist Principals	June 2017	Completed
Develop Work-Based Learning Plan for every student who has a vocational goal	Karen Rowe, Transition Specialist Principals	June 2017	Completed
Develop Person Centered Planning and Transition Tool (PCPTT)	Karen Rowe, Transition Specialist Principals	Sept 2015	Completed
Implement Person Centered Planning and Transition Tool (PCPTT)	Karen Rowe, Transition Specialist Principals	June 2017	Completed
Collaborate with member district to customize programming for their students regarding Transition Service.	Karen Rowe, Transition Specialist	Fall 2018	Ongoing
Open new Site 2 classroom specifically designed for students of the Autism Spectrum who may not be a great fit for the other classrooms where there is a large outdoor education	Julie Fielding, Principal	Winter 2017	Completed

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 1b	Person Responsible	Date	Status
100% of applicable teachers/staff will be trained in using Career Cruising	Karen Rowe, Transition Specialist Principals	June 2016	Completed
50% of high school and middle school students have an individual account	Karen Rowe, Transition Specialist Principals	June 2017	Completed
Each student has a Work-Based Learning Plan	Karen Rowe, Transition Specialist Principals	Fall 2018	Completed
Meet with teachers to ensure that 70% of the PCPTTs are complete	Karen Rowe, Transition Specialist Principals	Fall 2018	Completed

Strategic Objective:

- 1.) All students and adults will be prepared for successful adult living

Initiative:

- 1c.) Build Independence through community activities: role play and real life situations; vocational activities; practicing life skills

Monitoring Progress

Process Benchmark	Person Responsible	Date	Status
Identify current transitional skills curriculum collaborative wide	Karen Rowe, Transition Specialist Matt Gentile, Guidance Counselor	Fall 2017	Completed
Identify gaps in curriculum	Karen Rowe, Transition Specialist Matt Gentile, Guidance Counselor	Winter/Spring 2017	Completed
Explore and research space for ILS curriculum	Chris Scott, Executive Director Principals Heather Valcanas, Assoc. Director of Adult Services	2019-2020 School Year	In Progress
Create and implement a Google doc to capture current vocational opportunities. Status update May '19: List of opportunities is created, need to merge into one Google doc.	Karen Rowe, Transition Specialist Heather Valcanas, Assoc. Director of Adult Services Transition Services Dept.	2019-2020 School Year	Ongoing
Identify community-based experiences by functional domains.	Karen Rowe, Transition Specialist Lia Metrakas, Asst. Principal Nicole Noska, Principal Heather Valcanas, Assoc. Director of Adult Services	2019-2020 School Year	In Progress
Create a Google doc to capture community-based experiences by functional domains.	Karen Rowe, Transition Specialist Lia Metrakas, Asst. Principal Nicole Noska, Principal Heather Valcanas, Associate Director of Adult Services	2019-2020 School Year	In Progress
Identify an annual transition assessment to administer to all high school students and adults.	Karen Rowe, Transition Specialist Lia Metrakas, Asst. Principal Nicole Noska, Principal Heather Valcanas, Assoc. Director of Adult Services	2018-2019 School Year	Completed

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark	Person Responsible	Date	Status
Utilizing a transition assessment tool to collect yearly data.	Karen Rowe, Transition Specialist	2019-2020 School Year	Completed
Teachers and Job Coaches will utilize the functional domain Google doc to plan community-based experiences.	Karen Rowe, Transition Specialist Principals Heather Valcanas, Assoc. Director of Adult Services	2019-2020 School Year	In Progress

Action Plan

Strategic Objective:

- 1.) All students and adults will be prepared for successful adult living

Initiative:

- 1e.) Self Actualization: Create programming that promotes growth towards self-actualization for students and adults

Monitoring Progress

Process Benchmark	Person Responsible	Date	Status
Each school will identify their current programming and the required enhancements needed to ensure students receive the supports required to develop the skills to self-actualize based on Maslow's Hierarchy of Needs Pyramid. Update: Site 3 administering self-determination assessments to all students as part of transition assessment.	Karen Rowe, Transition Specialist Julie Fielding, Principal Nicole Noska, Principal Annie Willis, Principal	October 2019	In Progress
Create a Google doc that captures current programming and activities relevant to skills that help students and adults lead to self-actualization.	Karen Rowe, Transition Specialist Julie Fielding, Principal Nicole Noska, Principal Annie Willis, Principal Joe Venskus, Adult Services Mgr.	October 2019	In Progress
Identify gaps in programming based on specific needs	Karen Rowe, Transition Specialist Julie Fielding, Principal Nicole Noska, Principal Annie Willis, Principal Joe Venskus, Adult Services Mgr.	Spring 2020	Ongoing
Reconvene as a DIP Team to discuss next steps	Karen Rowe, Transition Specialist Brian Mihalek, Asst. Principal Leadership Team	Spring 2020	Ongoing

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark	Person Responsible	Date	Status
75% of Students' who have a Valley IEP will meet their IEP goals Update: 62% of students and adults have met their goals	Julie Fielding, Principal Nicole Noska, Principal Annie Willis, Principal IEP Teams	June 2020	- In Progress

Incorporate thoughtful self-actualization questions into the Sense of Belonging Survey for students, parents, and staff. Status update: Student survey questions #18, 21, 22, 25, 26, 27, and 28 have been identified as self-actualization questions.	Sense of Belonging Committee	Spring 2017 Spring 2019	Completed
Analyze the data from the Sense of Belonging student survey to establish baseline data in the area of self-actualization.	Sense of Belonging Committee	April 2019	Completed

Strategic Objective:

- 1.) All students and adults will be prepared for successful adult living

Initiative:

- 1f.) Track student's/adult's progress on their annual IEP/ISP goals using a "met" and "not met" scale as measured by the progress reports.

Monitoring Progress:

Process Benchmark for Initiative 1f	Person Responsible	Date	Status
Weekly progress notes are completed for adults and information is compiled to make quarterly progress reports. A new ISP Goal Form for the Today and Tomorrow Program has been created. Additionally, Valley is working with a Google consultant to create a Google Sheet to capture the "met" and "not met" student data systematically. Status update: Staff from the adult services program held 3 meetings with a consultant in order to strengthen current practices for writing goals and objectives as well as to revise current goals and objectives.	Heather Valcanas, Assoc. Director of Adult Services Joe Venskus, Adult Services Mgr.	2017- 2020 School Years	Ongoing

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 1f	Person Responsible	Date	Status
100% of adult services staff have been trained in using ISP Goal Form	Joe Venskus, Adult Services Mgr.	March 2017	Met
Job Developer has been tasked with reviewing ISP Goal Forms and working with vocational coaches to capture all relevant information regarding progress towards meeting ISP goals.	Joe Venskus, Adult Services Mgr.	January 2017	Completed
Using information gathered from ISP Goal Forms individuals have been given specific worksite modifications and tools to support them in achieving ISP goals more quickly.	Heather Valcanas, Assoc. Director of Adult Services Joe Venskus, Adult Services Mgr.	August 2019	Ongoing

Strategic Objective:

- 1.) All students and adults will be prepared for successful adult living

Initiative:

- 1g.) Administer an Independence Survey

Monitoring Progress:

Process Benchmark for Initiative 1g	Person Responsible	Date	Status
Surveys have been developed, implemented, and completed by students/adults and families during the Spring of 2016 to collect baseline data on “Sense of Belonging”: independence, peer relationships, school culture, and impressions of staff. These surveys, including staff surveys, will be re-administered to work towards continuous improvement.	Brian Mihalek, Asst. Principal	Spring 2016 and ongoing yearly	Ongoing

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 1g	Person Responsible	Date	Status
By the end of the 2018/2019 survey cycle, the Sense of Belonging committee will analyze survey data derived from the “Sense of Belonging” student survey to identify 1 recommendation in order to receive a minimum of 80% of a combined ‘yes’ and ‘sometimes’ (approval) rating for each independence question by the end of the 2019/2020 school year. Status update: Independence question comparison analysis has been completed between the 2015-2016 and 2018-2019 school years.	Brian Mihalek, Asst. Principal & The Sense of Belonging Committee	Fall 2019	Ongoing

Strategic Objective:

- 1.) All students and adults will be prepared for successful adult living

Initiative:

- 1h.) Track Post-secondary Plan/Placement

Monitoring Progress:

Process Benchmark for Initiative 1h	Person Responsible	Date	Status
<p>A database was implemented by Valley Transitional High School's guidance counselor to track this information by student name, district, and post-secondary plan: college, trade school, work, military, other, as well as adult service agencies involved. With such a diverse student population, our graduating seniors are transitioning out into a number of different opportunities.</p> <p>2015- 2016 On site one, we have 11 students going straight into the workforce, three students continuing their education in a trade school, and four students who plan on attending college in the fall. More than half of the graduating class from site one will be working with some form of state agency, from DMH to MRC, after graduation. On site two, nine of our graduating students have enrolled in college for the fall with the other two students choosing to go directly into the work force. On site three, all but one of the graduating students will be receiving state services such as DDS with 11 of them attending an adult services program, three students enrolling in college, two students going straight to work, and one student enrolling in a trade school.</p> <p>2016-2017 Site 1 has 16 students graduating, all with their own specific plan. Four of these students plan to attend post-secondary institutions ranging from community college to four year universities to trade schools to hone a specific skill. Two of the students will be utilizing adult services through Valley or MRC. Nine of the students plan to go right into the work force, with four of them already securing employment. One graduating senior plans to travel for a year before committing to any sort of future education. Site 2 has 18 graduating seniors. 12 of these students will be attending post-secondary education also ranging from University, community college, and trade school. Three students will be utilizing adult services either continued through Valley or through MRC. Three students plan on going straight into the work force with two of those students already securing employment.</p> <p>2017-2018 Site 1 has eight students graduating. Two of these students will be attending Middlesex Community College in the Fall (graphic design and undeclared). One of the graduates plans to attend Universal Technical Institute to work</p>	<p>Matt Gentile, Guidance Counselor</p> <p>Matt Gentile, Guidance Counselor</p> <p>Matt Gentile, Guidance Counselor</p>	<p>2016</p> <p>2017</p> <p>2018</p>	<p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>

<p>toward a certification in automotive technology. Another student will be attending JobCorps to earn a certificate in masonry. Two graduates will be moving out of state and plan to work full time. One senior will be joining the NAVY and is in the final portion of his testing. The remaining student will be receiving services through MASS REHAB to help with employment skills and placement.</p> <p>Site 2 has 12 students graduating. Three of these students will attend Middlesex Community College in the fall (computer science and undeclared). Two students will be attending Northern Essex Community College (biology and EMT – Basic). One student will attending Lesley University and another student will be attending Fisher college in the fall. One student will be enrolling in JobCorps. One student is moving out of state and plans to work full time. Two students will be staying with Valley and enrolling in the School to Work Program. One student plans to take some time off from education and will be receiving services through MASS REHAB to help with employment skills and placement.</p> <p>Site 3 – One student will be attending the Transitions Program at Middlesex Community College. One student will be attending JobCorps.</p>			
<p>2018-2019</p> <p>Site 1-There are 10 students from Site 1 graduating this year. Three students plan to attend Middlesex Community College in the fall. Five students plan on attending trade school (UTI, Massachusetts School-Barbering, North Bennet Street School, and University of Northwestern Ohio). One student is attending Manchester Community College and the remaining student has accepted a full time position as a landscaper.</p> <p>Site 2 has 13 students graduating this year. Six students plan on attending Community College (5 attending Middlesex Community College and 1 attending Manchester Community College). Four students have been accepted at four-year colleges. One student plans on entering the Navy. One student plans on attending beauty school. One student will be deferring their diploma in order to attend a high school post-graduate program.</p> <p>Site 3- 21 students are leaving school services. One will be going to job corps and the others are transitioning to adult programs. They are accessing services through DDS and/or MRC. Two students are transitioning to the Valley Collaborative adult program. Other students will be accessing programs in their home communities.</p>	Todd Fletcher, Guidance Counselor	2019	Ongoing

- 2.) Valley Collaborative will provide professional development to build capacity and retain high quality staff

Initiative:

- 2a.) Develop content specific PD in Technology

Monitoring Progress:

Process Benchmark for Initiative 2a	Person Responsible	Date	Status
Identify PD Focus Group members: <ul style="list-style-type: none"> ● Joia Mercurio ● Kari Morrin ● Judy Norton ● Nicole Noska ● Heather Valcanas 	PD Focus Group	September 2015	Completed
Define Valley's 'technology' uses and needs		Fall 2015	Completed
Adopt/Modify needs assessment (i.e. DESE's TSAT) for technology to collect baseline data (i.e. "How often do you use...")		Fall 2015	Completed
Administer the DESE's TSAT (modified)		Winter 2016	Completed
Assess needs assessment data		Winter 2016	Completed
Prioritize identified areas of need		Winter 2016	Completed
Modify current PD evaluation form to collect continued progress data		Spring 2016	Completed
Create PD plan for 2016 -2017 school year		Summer 2016	Completed
Provide Beginner Smart Board training for ELA and Humanities as well as Math and Science as a choice for October 7 th early release PD Day		Fall 2016	Completed
Provide Beginner and Advanced mandatory Smart Board training for all licensed staff during staff meeting times at the Elementary and Middle/High		Spring 2016	Completed

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 2a	Person Responsible	Date	Status
60% return rate of needs assessment among all staff	PD Focus Group	Winter 2016	Completed
Analyze results and identify top 3 high priority technology PD needs from needs assessment		Winter 2016	Completed

2.) Valley Collaborative will provide professional development to build capacity and retain high quality staff

Initiative:

2b.) Build Capacity through the Induction and Mentor Programs for Educators and Leaders and provide leadership opportunities

Monitoring Progress:

Process Benchmark for Initiative 2b	Person Responsible	Date	Status
Create formal Leadership Mentorship Program.	Kari Morrin, Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology Chris Scott, Executive Director	Spring 2018	Completed
Develop Educator Mentorship Program.	Kari Morrin, Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Fall 2016	Completed
Establish a Leadership PLC where people read the latest research on leadership, watch current videos and participate in leadership presentations facilitated by Dr. Tony Bent.	Dr. Tony Bent Valley Leadership Team	Fall 2016	Completed
Establish a Leadership Coffee Hour with distinguished leaders from across the state reflecting on their leadership experiences so that leaders can learn from them.	Chris Scott, Executive Director Karen Blackburn, Admin. Assistant	Fall 2016	Completed
Create networking opportunities for Valley Leaders, Board Members who are new Superintendents, Member District Assistant Superintendents, Special Education Directors and Northeast Collaborative Executive Directors through Leadership Coffee Hours, regional meetings, social gatherings.	Chris Scott, Executive Director and Regional Leaders	Fall 2016	Completed
Highlight the restructuring efforts of the past 4 years as a case study presentation to MASS's Assistant Superintendent group.	Chris Scott, Executive Director and Regional Leaders	Spring 2017	Completed

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 2b	Person Responsible	Date	Status
Schedule of Leadership Coffee Hours - to date, Valley has hosted two meetings	Chris Scott, Executive Director Karen Blackburn, Admin. Assistant	Fall 2016	Completed

Schedule of Leadership meetings with Dr. Tony Bent	Chris Scott, Executive Director Karen Blackburn, Admin. Assistant	Fall 2016	Completed
Schedule of FY17 Mentor and Induction Meetings	Kari Morrin, Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Fall 2016	Completed

Initiative:

2c.) Provide PD Choice: Half Days

Monitoring Progress:

Process Benchmark for Initiative 2c	Person Responsible	Date	Status
Identify PD Focus Group Members: <ul style="list-style-type: none"> ● Joia Mercurio ● Kari Morrin ● Judy Norton ● Nicole Noska ● Heather Valcanas 	PD Focus Group	September 2015	Completed
Develop survey of half day model		Fall 2015	Completed
Analyze technology needs assessment priority outcomes		Winter 2016	Completed
Administer Survey of Half Day Model		Winter 2016	Completed
Develop a PD Schedule/ Catalogue of PD Offerings		Fall 2016	Completed
Identify and secure providers/trainers for 2016 - 2017 school year		Fall 2016	Completed
Work with NPEN (Northeast Professional Educators Network) to offer PD for Educators, and Related Service Providers in the Northeast Region on Election Day 2016		Ongoing	Completed

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 2c	Person Responsible	Date	Status
60% return rate of needs assessment and half day model survey	PD Focus Group	Winter 2016	Met
Provide PD Schedule of Offerings	Kari Morrin Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Winter 2017	Completed

Provide schedule from October 7th half day offerings	Kari Morrin Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Winter 2017	Completed
Provide schedule from NPEN day of Valley providers and in-district para trainings	Kari Morrin Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Winter 2017	Completed

2d.) All staff: Participants evaluate professional development offerings.

Monitoring Progress:

Process Benchmark for Initiative 2d	Person Responsible	Date	Status
Valley evaluates all professional development offerings. The evaluation scale has simply been agree or disagree in ten targeted areas and multiple open response questions. On average the evaluations have been favorable. In order to improve the Evaluation tool Valley's PD department has asked Billerica Public Schools to see a copy of their Professional Development Feedback Form to use as a model in the redevelopment of this form.	Kari Morrin Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	2015-2016 School Year	Completed
Valley has modified its professional development evaluation form as a Google form and has changed its questions to emulate Billerica Public School's.	Kari Morrin Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Spring 2017	Completed

Action Plan

Strategic Objective:

- 2.) Valley Collaborative will provide professional development to build capacity and retain high quality staff

Initiative:

- 2e.) Establish Professional Learning Communities (PLCs)

Monitoring Progress:

Process Benchmark for Initiative 2e	Person Responsible	Date	Status
Appoint Department Leads in STEM, English and Humanities, and Literacy	Joia Mercurio, Asst.Executive Director of Curriculum and Technology	Winter 2016	Completed
Each Department Lead to establish a PLC in their discipline	Heather McKay- Science Lead Glen Costello Math Lead Nick LeClair- Literacy Lead Meghan Waters- Literacy Lead Matt Manfredi- ELA Lead	Fall 2018	Ongoing
Each PLC to develop a schedule of meetings and goals and objectives for 2018- 2019 school year	Heather McKay- Science Lead Glen Costello Math Lead Nick LeClair- Literacy Lead Meghan Waters- Literacy Lead Matt Manfredi- ELA Lead	Fall 2018	Ongoing

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 2e	Person Responsible	Date	Status
Department Leads will communicate to Collaborative staff via emails, events, newsletters, etc.	Joia Mercurio, Asst.Executive Director of Curriculum and Technology	Fall 2016	Completed
Implementation of STMath in all appropriate programs	Glen Costello- Math Lead	Spring 2017	Completed

- 2.) Valley Collaborative will provide professional development to build capacity and retain high quality staff

Initiative:

- 2f.) Network to develop opportunities to work collaboratively with school districts and Collaboratives in the Northeast

Monitoring Progress:

Process Benchmark for Initiative 2f	Person Responsible	Date	Status
Joint planning with districts: Northeast Professional Educators Network (NPEN)	Kari Morrin Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Fall 2016	Ongoing

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 2f	Person Responsible	Date	Status
Comparison of number of Valley presenters from FY to FY	Kari Morrin Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Fall 2016 Fall 2017 Fall 2018 Fall 2019	Ongoing
Scheduled list of NPEN Steering committee meetings	Kari Morrin Dir.of Adult Services & Human Resources Joia Mercurio, Asst. Executive Director of Curriculum and Technology	Fall 2016 Fall 2017 Fall 2018 Fall 2019	Ongoing

3.) Valley Collaborative will foster a sense of belonging and engagement in the Collaborative community for all stakeholders (students, adults, families, staff, districts, community partners)

Initiative:

3b.) *Maintain Community Involvement:* Identify and develop Valley Collaborative facilitated events with the purpose of maintaining community involvement for students, adults, and community partners

Monitoring Progress:

Process Benchmark for Initiative 3b	Person Responsible	Date	Status
<p>In order to effectively assess community involvement and more specifically, understand how to maintain or increase community involvement, one must first understand their sense of belonging. Therefore, Valley Collaborative will need to collect baseline data regarding students', adults', and families' current sense of belonging.</p> <p>1. Develop a task committee to assess engagement of student and families at Valley Collaborative.</p> <p>a. Develop meeting schedule</p>	Brian Mihalek, Asst. Principal	December 2015	Completed
<p>2. Committee meeting to discuss:</p> <p>a. Plan Overview, Action Plan Overview, types of information to be obtained from the survey, student and parent access to the survey, determine teams within the committee, brainstorm challenges/barriers to success</p>	Task Committee	December 2015	Completed
<p>3. Committee meeting to discuss:</p> <p>a. Survey methods, questions for survey that address (happiness, safety, respect, acceptance, and engagement), adjust timeline in Action Plan Template, type of survey, brainstorm challenges/barriers to success</p>	Task Committee	December 2015	Completed
<p>4. Committee meeting to discuss:</p> <p>a. Rough draft of student survey</p> <p>b. Rough draft of parent survey</p> <p>c. Define student engagement/sense of belonging in the following areas: independence, happiness, safety, respect, acceptance, and engagement, community, classroom, vocational, non-academic, and feelings towards school</p> <p>d. Define family engagement in the following areas: independence, communication, involvement in school based activities, feelings about student program, feelings about student's progress, feeling about school, and the feelings about student's happiness</p>	Task Committee	January 2016	Completed
<p>5. Committee meeting to discuss:</p> <p>a. "Sense of Belonging" definition</p> <p>b. Discuss committee feedback on student and parent survey</p> <p>c. Discuss modifications to different surveys for different populations</p> <p>d. Discuss Google Doc survey as main method for student survey</p>	Task Committee	February 2016	Completed

6. Committee meeting to discuss: a. Final definition of "Sense of Belonging" b. V. Drive for data collection c. Final student/parent surveys d. Communication plan for all staff e. Determine implementation phase	Task Committee	March 2016	Completed
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7. Final meeting before implementation of surveys	Task Committee	March 2016	Completed
8. Update on progress: a. "Sense of Belonging" has been defined b. Data has been set up to be collected on the V drive through a Google Doc survey c. Final student survey was distributed beginning 4/6/16. Parent Survey has multiple drafts and will be finalized by May 16 th d. Team members have communicated the purpose and instructions of the student survey e. Student survey will be completed by all students on 4/29/16 at which point the team will start to determine data analysis protocol.	Task Committee	April 2016	Completed
9. Committee meeting to discuss: a. Define means of data analysis and collection b. Finalize parent survey	Task Committee	May 2016	Completed
10. Committee meeting to discuss: a. Data collected to date b. survey completion analysis	Task Committee	May 2016	Completed
11. Committee meeting to discuss: a. Next steps for identifying strengths/ areas of need, recommendations	Task Committee	October 2016	Completed
12. Analyze Sense of Belonging Survey data to make recommendation for Community Involvement Activities	Task Committee	October 2016	Completed
13. Plan, develop, and implement one new community involvement engagement activity Update on progress: Based on data derived from parent survey, Sense of Belonging committee identified areas of need within the parent base regarding trainings needed. In coordination with Sense of Belonging committee and Parent Advisory Council, a Parent	Task Committee	Spring 2017	Completed
14. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> • Data entry for all surveys • Cycle 1 data analysis • Work with site specific teams to identify relative strengths and areas of need derived from data • Generate recommendations 	Task Committee	October 2016	Completed
15. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> • Review all relative strengths and areas of need • Make modifications to cycle 2 student, parent and adult surveys • Create site specific and Collaborative wide recommendations • Discuss cycle 2 timeline 	Task Committee	November 2016	Completed

16. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none">• Finalize student, parent, adult surveys• Finalize site specific recommendation action plan with timeline• Start to generate staff survey questions	Task Committee	December 2016	Completed
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17. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> Finalize Valley Collaborative recommendation action plan with timeline Create sub-committees to address collaborative wide recommendations Finalize cycle 2 timeline 	Task Committee	January 2017	Completed
18. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> Review final site specific and collaborative wide recommendation action plan Finalize staff survey 	Task Committee	March 2017	Completed
19. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> Identify Needs Strengths and areas of need/ action plan expectations Finalize Student survey Identify open ended questions (by site team) Principal email sent for open ended question feedback Create general directions for teachers/therapists Directions at the beginning of the survey 	Task Committee	Dec 17, 2018	Completed
20. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> Timeline for student survey Create site specific results page 	Task Committee	Jan 16, 2019	Completed
21. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> Plan moving forward <ul style="list-style-type: none"> Collaborative email sent Feb. 26th Directions to teachers/therapists being sent March 4th Student surveys due March 22nd Send out family surveys March 4th 	Task Committee	Feb 27, 2019	Completed
22. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> Student and family surveys due March 29th Communicate results of last year's data and plans in the month of May Create data sheets for this year's survey data Work on staff survey results/action plan/email with directions Put together data package and memo for all stakeholders (to be distributed after all surveys are taken) 	Task Committee	April 3, 2019	Completed
23. Sense of Belonging Committee meeting to discuss: <ul style="list-style-type: none"> Enter raw data from student surveys into data sheet located in Identify strengths and areas of need Create action plan Communicate results of last year's data and plans (results memo page) in the month of May Work on staff survey results 	Task Committee	April 11, 2019	Completed
24. Implement Sense of Belonging Student Survey <ol style="list-style-type: none"> April 2016 (baseline) April 2017 Fall 2018 Spring 2019 	Task Committee	September 2017	A. Complete B. Complete C. Complete D. Complete

25. Implementation of Adult Survey a. April 2016 (baseline) b. April 2017 c. April 2018 d. Fall 2019	Task Committee	September 2017	A. Complete B. Complete C. Complete D. In Progress
26. Implementation of Parent Survey a. April 2016 (baseline) b. April 2017 c. Fall 2018 d. Spring 2019	Task Committee	September 2017	A. Complete B. Complete C. Complete D. Complete
27. Implementation of Staff Survey a. April 2016 (baseline) b. April 2017 c. Fall 2018 d. Fall 2019	Task Committee	September 2017	A. Complete B. Complete C. Complete D. In progress
28. Analyze Data and make Recommendations a. Analyze 2015-2016 Data and make Recommendations b. Analyze 2016-2017 Data and make Recommendations c. Analyze 2017-2018 Data and make Recommendations d. Analyze 2018-2019 Data and make Recommendations	Chris Scott, Executive Director Brian Mihalek, Asst. Principal	June 2016/2017	A. Complete B. Complete C. Complete D. In progress

29. Report Data to stake holders and Executive Board a. Report 2015-2016 Data to stake holders and Executive Board b. Report 2016-2017 Data to stake holders and Executive Board c. Report 2017-2018 Data to stake holders and Executive Board d. Report 2018-2019 Data to stake holders and Executive Board	Chris Scott, Executive Director Brian Mihalek, Asst. Principal	June 2016 June 2017 June 2018 June 2019	A. Completed B. Completed C. Completed D. In progress
Report baseline data to stake holders and Executive Board	Chris Scott, Executive Director Brian Mihalek, Asst. Principal	June 2016	Completed

Process Benchmark for Initiative 3b	Person Responsible	Date	Status
The Elementary, Middle and High School Valley Collaborative Parent Advisory Council (PAC), will plan one engagement initiative regarding "Rights and Responsibilities in Special Education" to all families of students K-12. Middle School/High School presented on 11.17.15 Elementary and Middle School/High School scheduled to presented on 5.11.17 Elementary School met this on 10/26/17. Middle School/High School presented on 4.25.18 Middle School/High School presented on 05.01.19	Brian Mihalek, Asst. Principal Lia Metrakas, Asst. Principal Pam Walker, Asst. Principal Brian Mihalek, Asst. Principal Lia Metrakas, Asst. Principal Jennifer Bergeron, Asst. Principal Brian Mihalek, Asst. Principal Lia Metrakas, Asst. Principal Jennifer Bergeron, Asst. Principal	Fall 2016 Spring 2017 Spring 2018 Spring 2019	Completed '16 Completed '17 Completed '18 Completed '19
The Valley Collaborative Human Rights Group will plan one engagement initiative regarding "Accessing Resources in the	Pat Evans, Adult Program	Spring 2017	Ongoing
Develop Employee of the Month recognition initiative	Julie Fielding, Principal Nicole Noska, Principal Annie Willis, Principal	On going	Ongoing
Continue to include all member districts sped directors as well as other stakeholder representatives to the District Improvement Planning process	Chris Scott, Executive Director	Fall 2016	Ongoing

Process Benchmark for Initiative 3b	Person Responsible	Date	Status
<p>In response to the Sense of Belonging survey data, the Sense of Belonging Committee has collaborated with the PAC in order to identify and develop Valley Collaborative facilitated events with the purpose of maintaining community involvement for students, adults, and community partners</p> <ol style="list-style-type: none"> 1. Facilitators at Valley Elementary School and Valley Middle School/Transitional High School have held staff luncheons in addition to meetings on the following topics: transition planning, internet safety, and parents' rights. Artifacts including agendas and sign-in sheets for these meetings have been collected. 2. PAC Facilitators at Valley Transitional Middle/High School held staff luncheons in addition to meetings and a Family Workshop Event on the following topics: transition planning, financial planning, special ed. law and parents' rights. Artifacts including agendas and sign-in sheets for these meetings have been collected. (May 1st, 2019) <p>Status update: May 1, 2019 Middle School/High School Parent Advisory Council held their annual Family Workshop. The series of presentations covered topics in the areas of guardianship, navigating the cyber world, and transition.</p>	Brian Mihalek, Asst. Principal	2015-2020 School Years	Ongoing

Group	Engagement Initiative	Artifact	Status
Students	1. School Play Performance 2. Student Trips 3. Class Trips (Overnight) 4. After School Activities (Recreation)	1. Program 2. Permission Slips/Itineraries 3. Permission Slips 4. Schedules	Completed
Adults	1. Valley Collaborative Dance 2. Human Rights Meetings (Quarterly)	1. Flyer 2. Itineraries, Minutes, Sign-In Sheet	Completed
Families	1. Open House 2. Parent Advisory Group 3. Spirit Fridays (Elementary)	1. Sign-In Sheet 2. Meeting Minutes 3. Flyers/Invitations	Completed
Staff	1. Staff Appreciation Day 2. School Spirit Contests	1. Flyers 2. Prizes	Completed
Districts	1. District Outreach Meetings 2. SPED Advisory Meetings	1. Outreach Folders 2. Sign-In Sheet/Itineraries	Completed
Community Partners	1. District Improvement Planning 2. The INDEPENDENCE Project 3. School Play Performance	1. District Improvement Plan 2. Committee Meetings 3. Program	Completed

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark	Person Responsible	Date	Status
1. Sense of Belonging survey will have an 80% completion rate for students. Status update: 2018-2019 school year survey results had a completion rate of 81%.	Julie Fielding, Principal Nicole Noska, Principal Annie Willis, Principal	April '16 April '17 Fall '18	Met
2. Sense of Belonging survey will increase the completion rate for Families. Status update: 17% of families completed the 2018-2019 survey.	Julie Fielding, Principal Nicole Noska, Principal Annie Willis, Principal	April '16 April '17 Fall '18 Spring '20	In Progress
3. Sense of Belonging survey will have a 50% completion rate \ for Adults.	Julie Fielding, Principal Nicole Noska, Principal Annie Willis, Principal	April '16 April '17 Fall '18	Met
4. Report Sense of Belonging baseline data to the Board of Directors	Chris Scott, Executive Director	June '16 June '19	Completed
5. A 10% increase in participation at PAC facilitated events Status update: The PAC council had 18 participants in this years 2018/2019 school year family workshop event. This was an increase of 5 participants from last years attendance.	PAC facilitators	Fall '17 May '19	Met

Resources Supporting Implementation*The staff and financial resources allocated to support this initiative*

Resources
Google Survey
IT Consultation

Action Plan**Strategic Objective:**

3.) Valley Collaborative will foster a sense of belonging and engagement in the Collaborative community for all stakeholders (students, adults, families, staff, districts, and community partners)

Initiative:

3c.) *Increase District Participation in Advisory Board Meetings:* Communication; forecasting potential students and programs

Monitoring Progress:

Process Benchmark for Initiative 3c	Person Responsible	Date	Status
1a. Establish an Outreach committee (compromised of two Valley Board of Directors, one member District Special Education Director, Valley Collaborative Executive Director and Assistant Director)	Chris Scott, Executive Director	November 2015	Completed
1b. Establish Co-Chair for SPED Advisory Board, and one			
2 The Outreach committee schedules a 60 minute meeting with the District teams. Each District team will be comprised of the Superintendent, the Special Education Director, and the district liaison(s).	Joia Mercurio, Asst. Executive Director of Curriculum and Technology	January 2016	Completed
3 Outreach committee and District teams will meet and discuss 5 year District Improvement Plan.	Outreach Committee and District Teams	April 2016	Completed
4 At the same meeting, Valley program offerings will be reviewed.	Outreach Committee and District Teams	April 2016	Completed
5 At the same meeting, Valley tuitions and services will be compared to other local Collaborative(s).	Outreach Committee and District Teams	April 2016	Completed
6 At the same meeting, there will be a review of the Out of District referrals to non-Valley placements questionnaire.	Outreach Committee and District Teams	April 2016	Completed
7 At the same meeting, review of Valley student termination questionnaire.	Outreach Committee and District Teams	April 2016	Completed
8 Member District Special Education Department to fill out questionnaires and submit to Valley Team.	Member Districts Special Education Dept.	April 2016	Completed
9 Co-chair quarterly Special Education Advisory Meeting with member district Special Education Administrators	Chris Scott, Executive Director and Valley Team	Winter 2017	Ongoing

10	Invite member district Special Education Administrators to be a part of Valley's "Leadership Coffee Hour"	Chris Scott, Executive Director and Valley Team	Winter 2017	Completed
11	Host DESE's Regional Special Education Meeting	Chris Scott, Executive Director and Valley Team	May 2017 & April 2018	Ongoing
12	Valley Team to analyze data from Google "Student Referral Survey" Form	Chris Scott, Executive Director and Valley Team	May 2016	Ongoing
13	Valley Team makes recommendation for programming changes or enhancements to Board of Directors, if required.	Chris Scott, Executive Director	June 2016 Board Meeting	Ongoing

Monitoring Progress:

Process Benchmark for Initiative 3c	Person Responsible	Date	Status
Create a Referral Database Committee: Joia Mercurio, Brian Mihalek, Nicole Noska, Annie Willis, Heather Valcanas, Sean Glavin, Kari Morrin, Julie Fielding, Chris Cowan, Kristine Bonsack, and Jessica Scalzi	Referral Database Committee	Winter 2017	Completed
Develop a Referral Google Form that feeds into a Google Sheet	Referral Database Committee	Spring 2017	Completed
Implement Referral Google Form	Referral Database Committee	Spring 2017	Completed
Analyze current enrollment per MS classroom (program)	MS Administration Team	Fall 2016	Completed
Establish quarterly communication protocol with Elementary School admin to identify needs (# 6th grade referrals, student movement, etc.)	MS Administration Team	Winter 2017	Completed
Input 2016/2017 SY referrals into database	MS Administration Team	Ongoing	Completed
Review data from elementary school database and current enrollment for start of 17/18 SY	MS Administration Team	Ongoing	Completed
Meet with Elementary admin to discuss projected upcoming student movement for ESY 2018	MS Administration Team	Ongoing	Completed
Analyze and review data from referral database and meet with Executive Director regarding possible programmatic needs (additional classroom space, staff, etc.)	MS Administration Team	Ongoing	In progress
Develop/adjust programming per recommendations from data gathered through referral database and elementary movement	MS Administration Team	Ongoing	In progress

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark for Initiative 3c	Person Responsible	Date	Status
Meeting completed and attendance	Chis Scott, Executive Director & Co-Chair	April 2016	Completed
Report out data, and add District Improvement Plan to website	Chris Scott, Executive Director & Co-Chair	June 2016	Completed

Action Plan

Strategic Objective:

3.) Valley Collaborative will foster a sense of belonging and engagement in the Collaborative community for all stakeholders (students, adults, families, staff, districts, community partners)

Initiative:

3d.) *Increase and Maintain Student and Family Communication:* Parent orientation; invite and inform; current events; website; email

Monitoring Progress

Process Benchmark	Person Responsible	Date	Status
Research technology based apps (i.e. Class Dojo) for parent communication from school to home Status: Researched above apps. The Elementary School is currently using Class Dojo. MS/HS has looked into Parent Link with Aspen	Annie Willis, Principal Nicole Noska, Principal Julie Fielding, Principal	Fall 2018	Met
Identify appropriateness of technology based apps per site/school for parent communication from school to home (Aspen, Class Dojo.)	Annie Willis, Principal Nicole Noska, Principal Julie Fielding, Principal	2018-2019 School Year	Met
Consult with Valley Technology Committee to research school/district website models and best practices for website maintenance Status: Will be moving forward with Aspen.	Annie Willis, Principal Nicole Noska, Principal Julie Fielding, Principal	August 2018	Ongoing
Utilize Google for student email communications	Joia Mercurio, Asst. Executive Director	2018-2019 School Year	Ongoing

Measuring Impact

Early Evidence of Change: Changes in practice, attitude, or behavior you should begin to see if the initiative is having its desired impact

Early Evidence of Change Benchmark	Person Responsible	Date	Status
Establish timeline for full implementation of Aspen Update: Aspen has been fully implemented. Valley is utilizing Aspen for attendance, billing with districts, state reporting, report cards, assignment grades, and suspension notices.	Joia Mercurio, Asst. Executive Director of Curriculum and Technology Heather Valcanas, Assoc. Director of Adult Services	2019-2020 School Year	In Progress

**VALLEY COLLABORATIVE
TREASURER'S REPORT
OCTOBER 31, 2019**

		<u>Beginning Balance</u>	<u>Receipts</u>	<u>Payroll</u>	<u>Accounts Payable</u>	<u>Earnings</u>	<u>Transfers</u>	<u>Ending Balance</u>
ENTERPRISE BANK ACCOUNTS								
Operating	a/c 493426	\$ 1,861,786.54	\$ 745,355.24		\$ (1,081,103.13)		\$ (640,000.00)	\$ 886,038.65
Payroll	a/c 795823	\$ 452,802.33		\$ (1,489,072.51)			\$ 1,150,000.00	\$ 113,729.82
Joe's Bistro	a/c 531401	\$ 3,050.72	\$ 9,345.00		\$ (682.74)		\$ (10,000.00)	\$ 1,712.98
ICS MMDA	a/c 856490	\$ 54,949.82				\$ 9.33		\$ 54,959.15
Independence Project	a/c 821315	\$ 4,614.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,614.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 2,377,203.77</u>	<u>\$ 754,700.24</u>	<u>\$ (1,489,072.51)</u>	<u>\$ (1,081,785.87)</u>	<u>\$ 9.33</u>	<u>\$ 500,000.00</u>	<u>\$ 1,061,054.96</u>
MMDT	a/c 0044263747	\$ 2,487,600.10	\$ -	\$ -	\$ -	\$ 4,228.75	\$ (500,000.00)	\$ 1,991,828.85
Total Unrestricted Cash		<u>\$ 4,864,803.87</u>	<u>\$ 754,700.24</u>	<u>\$ (1,489,072.51)</u>	<u>\$ (1,081,785.87)</u>	<u>\$ 4,238.08</u>	<u>\$ -</u>	<u>\$ 3,052,883.81</u>
PARS OPEB Trust		\$ 4,098,519.33	\$ -	\$ -	\$ (853.86)	\$ 60,767.54	\$ -	\$ 4,158,433.01
TOTAL CASH		<u>\$ 8,963,323.20</u>	<u>\$ 754,700.24</u>	<u>\$ (1,489,072.51)</u>	<u>\$ (1,082,639.73)</u>	<u>\$ 65,005.62</u>	<u>\$ -</u>	<u>\$ 7,211,316.82</u>



VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
10/1/2019 to 10/31/2019

Heidi Kriger
Treasurer
Valley Collaborative
40 Linnell Circle
Billerica, MA 01821

Account Summary

Source	Beginning Balance as of 10/1/2019	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 10/31/2019
OPEB	\$4,098,519.33	\$0.00	\$60,767.54	\$853.86	\$0.00	\$0.00	\$4,158,433.01
Totals	\$4,098,519.33	\$0.00	\$60,767.54	\$853.86	\$0.00	\$0.00	\$4,158,433.01

Investment Selection

Vanguard Balanced Strategy

Investment Objective

The Balanced Portfolio invests in Vanguard mutual funds using an asset allocation strategy designed for investors seeking both a reasonable level of income and long-term growth of capital and income.

Investment Return

1-Month	3-Months	1-Year	Annualized Return			Plan's Inception Date
1.48%	2.59%	12.81%	3-Years	5-Years	10-Years	6/24/2015
			8.55%	-	-	

Information as provided by US Bank, Trustee for PARS; Not FDIC Insured; No Bank Guarantee; May Lose Value

Past performance does not guarantee future results. Performance returns may not reflect the deduction of applicable fees, which could reduce returns. Information is deemed reliable but may be subject to change.

Investment Return: Annualized rate of return is the return on an investment over a period other than one year multiplied or divided to give a comparable one-year return.

Account balances are inclusive of Trust Administration, Trustee and Investment Management fees



Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris Scott, Executive Director
Date: December 12, 2019
Re: MEC's 14 Boxes of Personnel Records

Before 2012 MEC owned all Human Resources and Financial operations of MSEC. As such, they kept many of their personnel files at the time of the separation. MEC now claims that they have MSEC's personnel files and want to return them. The Board will be asked to vote if they want to accept MEC's files.

Attorney Lent, Chair Piwowar and I will share more details at the meeting.

Required Action:

Vote to either reject or accept MEC's Files

Attachments:

MTRS Request Example



Main Office
500 Rutherford Avenue, Suite 210
Charlestown, MA 02129-1628
Phone 617-679-MTRS (6877)
Fax 617-679-1661

Western Regional Office
One Monarch Place, Suite 510
Springfield, MA 01144-4028
Phone 413-784-1711
Fax 413-784-1707

Online mass.gov/mtrs



Members of the Board

Jeff Wulfson
*Chairman,
Designee of the
Commissioner of
Elementary and
Secondary Education*

Deborah B. Goldberg
State Treasurer

Suzanne M. Bump
State Auditor

Dennis J. Naughton

Jacqueline A. Gorrie

Richard L. Liston

Anne Wass

Executive Director
Erika M. Glaster

November 14, 2019

Collaborative Employment Verification

Employment of:

SSN: XXX-XX- 7678

MTRS Member No 134

Service from: August 2001 – August 2002

I, _____, am the Director of the _____
Collaborative (the "Collaborative"), and I hereby certify that:

1. The above named employee is, and has always been during his/her service at the Collaborative, an employee of the Collaborative and not of its associated non-profit entity; and
2. That the above named employee has rendered actual service, on at least a half-time basis, to the Collaborative, has an office or work station at the Collaborative's place of business at which he/she regularly appears, works regularly with other collaborative staff or clients, attends staff meetings, and is in all respects an ordinary employee of the Collaborative who was regularly present at his/her job; and

(check the one that applies)

_____. 3. That during his/her employment here, the above named employee has rendered service solely to the Collaborative, and not to its associated non-profit entity; or

_____. 3a. That during his/her employment here, the above named employee has rendered service to the Collaborative and to its associated non-profit entity.

If 3a is checked: I further certify that during his/her career here, the above named employee has rendered service to the Collaborative (and



not the non-profit entity) on at least a half time basis, thus making him/her eligible for membership in the Massachusetts Teachers' Retirement System.

If 3a is checked, I have attached a history of the above named employee's work history at the Collaborative and its associated non-profit, showing his/her percentages of full-time service rendered to each entity (by year), and to the best of my ability a summary of the services rendered to each entity.

SIGNED UNDER THE PAINS AND PENALTIES OF PERJURY THIS
_____ DAY OF _____, 201__.

Name and Position: _____

RETURN TO: ATTN. Santosh Phuyal Senior Refund Analyst
Benefit Adjustments and Finalizations
Phone(617) 679-6815
Fax 617-679-1661
Email : santosh.phuyal@trb.state.ma.us

Member No. 134



Valley Collaborative

Today & Tomorrow Program

Funded by Department of Developmental Services

25 Linnell Circle, Billerica MA 01821 * Tel: (978)-528-7826 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris Scott, Executive Director
Heather Valcanas, Director of Adult and Transitional Services
Date: December 12, 2019
Re: Department of Developmental Services QUEST Audit

Valley's Adult Services Program recently received its QUEST audit results from the Executive Office of Health & Human Services Department of Developmental Services and received a perfect score of 100% in both its licensure and certification. This is a marked improvement over our last audit in 2017 where Valley received a 93% on licensure and 66% on certification.

This audit covered 57 licensing and 42 certification indicators. Valley "received a rating of met in 100% of licensing indicators with all critical indicators met". On certification indicators, Valley scored 100% on Planning and Quality Management and 100% on Employment and Day Supports.

Valley is thrilled with this result and is pleased that the program enhancements over the last two years have led to these results.

Required Action:

None

Attachments:

Quest Draft Provider Report



**PROVIDER REPORT
FOR**

**Valley Collaborative
40 Linnell Circle
Billerica, MA 01821**

Version

**PROVIDER REPORT- with
findings from targeted review
and self assessment processes**

**Prepared by the Department of Developmental Services
OFFICE OF QUALITY ENHANCEMENT**

SUMMARY OF OVERALL FINDINGS

Provider	Valley Collaborative
Review Dates	11/7/2019 - 11/14/2019
Service Enhancement Meeting Date	11/26/2019
Survey Team	Jennifer Conley-Sevier Steve Goldberg (TL)
Citizen Volunteers	

Survey scope and findings for Employment and Day Supports					
Service Group Type	Sample Size	Licensure Scope	Licensure Level	Certification Scope	Certification Level
Employment and Day Supports	2 location(s) 8 audit (s)	Targeted Review	DDS 13 / 13 Provider 44 / 44 57 / 57 2 Year License 11/26/2019-11/26/2021		DDS 14 / 14 Provider 28 / 28 42 / 42 Certified 11/26/2019 - 11/26/2021
Community Based Day Services	1 location(s) 3 audit (s)			DDS Targeted Review	14 / 14
Employment Support Services	1 location(s) 5 audit (s)			DDS Targeted Review	22 / 22
Planning and Quality Management				DDS Targeted Review	6 / 6

EXECUTIVE SUMMARY :

Valley Collaborative has provided services to children and adults with developmental disabilities since 1987. From its offices in Billerica MA the agency serves approximately 80 adults through its Community Based Day (CBDS) and Employment Supports services.

As a result of the agency's 2017 survey, Valley Collaborative was eligible and elected to complete, a self-assessment for the current licensing cycle, with DDS conducting a targeted review on the eight critical licensing indicators, and licensure and certification indicators receiving a rating of not met during the previous survey. The overall ratings from this survey process are a combination of the agency's self-assessment and the DDS targeted review.

It was evidenced from the outset of the survey that the agency had organized efforts to very specifically and systematically create systems for enhancing services relative to the certification indicators. For example, person centered career plans were in place for all the individuals surveyed, and evidence indicated that people's career goals and/or interests for community exploration had been supported. Interest inventories, vocational assessments and other tools were completed to assist supporters and individuals alike to identify specific areas of interest, or for further exploration. Community and/or work exploration activities included evidence of time spent assisting people to identify questions they wanted to ask, as well as post activity assessments. In an effort to address certification indicators regarding supports to connect with others in the community, some post activity assessments also asked whether individuals had met anyone new as part of the experience.

The majority of people supported by Valley Collaborative participated in both the CBDS and employment programs. Overall, individuals were active and engaged in their weekly activities/schedules, which they were happy to share and talk about. It was also evidenced that the main focus for staff was in supporting people to work. Many CBDS related groups and/or activities included curriculum focused on developing work related social or other skills, or to explore potential work interests. Although many CBDS and employment activities occurred in small groups, there was also evidence that individual desires for work or community exploration had also occurred. For example, for an individual interested in hairdressing as a possible career goal, an informational interview had occurred at a local hair studio. People's interest in caring for animals or plants was reflected in the development of related activities or jobs. Job coaches had also been effective in helping to create and/or support individualized work opportunities for several of the people surveyed. For example, a very specific work niche had been developed for one individual who, due to health and age had been considering retirement, but now is proudly working independently in the community on a daily basis. Another person surveyed worked two part time jobs in the community with minimal or intermittent support. The job coach had assisted in color coding tools at one job to help maximize the individual's independence. There were several similar examples observed of adjustments made to enable people to succeed on the job. Job coaching continued to be flexible, based on need, and natural supports were utilized whenever possible.

A review of the agency's Human Rights Committee indicated that it had full membership and met as required to review relevant information. The coordinator insured that information for review was sent electronically to members prior to meetings, and obtained their input even when a member was unable to attend. Although the agency supported no one with restrictive practices or significant behavioral concerns, the coordinator made efforts to bring information of interest to the committee. The HRC needs to ensure that required members attend on a more consistent basis, and that the committee obtain or develop a format to record the results from site visits.

As a result of this review, Valley Collaborative received a rating of met in 100% of licensing indicators, with all critical indicators met. The agency will receive a Two Year License. The agency is certified having received a rating of met in 100% of certification indicators reviewed.

Description of Self Assessment Process:

The Valley Collaborative Today and Tomorrow Program, prioritizes the safety and continual growth of the people that we support in an environment that complies with DDS regulations.

Valley uses a person centered approach when planning and implementing services so that individuals have the highest level of control possible in their day to day lives. Valley actively seeks input from individuals, staff, caregivers and other interested parties so that we can continually enhance and evolve our programs to meet individual needs.

For this self-assessment process we used a sample size of 20 individuals, approximately 20% of the population we support. The criterion for a standard met was 80%. Separate binders were created to capture artifacts required for met status for each unique indicator in both the licensure and certification categories and these binders were used as tools to determine whether or not each individual record assessed met the requirements. Separate teams of Valley staff were set up to conduct an initial, and secondary review of each artifact gathered for the individual scoring.

As part of this assessment process, Valley Collaborative interviewed staff and individuals and observed daily program activities for most of the Quest indicators. For Indicators requiring additional criteria to meet the standard, the following methods were used.

Valley Collaborative assessed Licensure Indicators as follows:

Personal Safety Indicators were assessed using a combination of reviewing training and communication materials and logs, and other dated documentation.

Environmental Safety Indicators were reviewed using spot checks and reviews of documentation such as Elevator Inspection Certificates.

Communication Indicators were assessed by reviewing individual binders and samples of individual feedback forms. The Collaborative also, contracts with Lexi-keet language services and as such can provide translation and documentation services in 63 languages including ASL.

Health Indicators were assessed by reviewing individual legal binders, medical logs and interviewing the program nurse. Specific health related curriculum was documented to have been taught. All required staff and site certifications are current.

Human Rights indicators were assessed by reviewing the Program Handbook, memos and human rights curriculum. The Valley Collaborative Human Rights Coordinator is responsible for training individuals, families, caregivers and Valley Staff on Human Rights definitions and issues. A weekly human right of the week is introduced and discussed with program participants by Valley Staff and a Human Rights Packet is sent home annually with individuals to share with their families and caregivers. Valley staff receives annual training on Human Rights as well. Dated copies of all human rights trainings and activities are kept in the Human Rights Binder.

Competent Workforce is assessed by reviewing Valley's hiring and training procedures and reviewing dated sign-in sheets for staff development professional days. It is the responsibility of the Assistant Director of Adult Services under the direction of the Director of Adult and Transitional Services to provide ongoing staff supervision and development. Valley's screening process for perspective employees is within the DDS guidelines for staff qualifications.

Goal Development and Implementation is assessed by reviewing individual ISP goals, objectives and support strategies and interviewing individuals to ensure that they are the primary drivers of this process. Individual Assessments are completed annually with program participants with an opportunity to review progress made during the ISP year. The effectiveness of individual support strategies is measured using daily progress notes completed by Valley vocational support staff.

Valley Collaborative assessed Certification Indicators as follows:

Planning and Quality Improvement Indicators were assessed using a variety of systems to analyze data to ensure efficient and effective service delivery which include Microsoft Excel workbooks, Word documents and Google sheets, forms and documents. Data can be accessed by Valley's supervisory staff through the Collaborative's shared drive. Valley Collaborative is in the final year of a five year District Improvement Plan where we have met our goals of increased stakeholder participation, better

measurement of ISP goal progress and increased empowerment for individuals. Valley has also expanded transitional services to ensure our Adult Programs are forward thinking and match the skills and interests of newly eligible individuals.

Valley Collaborative assessed the following CBDS indicators using the methods highlighted below: Communication indicators were assessed by reviewing the practices and attendance of Valley's Hiring Committee where program participants are actively involved in interviewing new staff. All individuals have the opportunity to provide feedback informally year-round and formally, semi-annually on staff performance. Memos are sent home regularly to individuals, families and DDS staff to solicit feedback as well.

Choice Control and Growth was assessed using the Assessment of Functional Living Skills tool, Sense of Belonging Google survey, and observation of staff competency in using Assistive Technology. Reviews and comparisons of rosters, lesson plans and progress notes were also completed.

Career Planning, Development, and Employment was assessed by reviewing meeting notes, activities exit tickets, monthly progress reports, and individual and staff interviews. Program Coordinators meet regularly with individuals to support them in developing and reaching their vocational goals and document meetings with monthly notes and calendar appointments.

Meaningful and Satisfying Day Activities were assessed using individual interest inventory forms, person centered plans, progress notes, and activities exit tickets and individual and staff interviews. Valley Collaborative assessed the following Employment Supports indicators using the methods highlighted below:

Communication indicators Valley has created a Hiring Committee where program participants are actively involved in interviewing new staff. All individuals have the opportunity to provide feedback informally year-round and formally, semi-annually on staff performance. Memos are sent home regularly to individuals.

Career Planning, Development, and Employment was assessed by reviewing meeting notes, activities exit tickets, monthly progress reports, and individual and staff interviews. Program Coordinators and/or Job Developers meet regularly with individuals to support them in developing and reaching their vocational goals. Individuals are supported at their various worksites by a vocational instructor to ensure that there is continuous skill development and opportunities for additional learning are recognized. The vocational instructor keeps detailed notes on the progress of each individual and ensures goals are supported and feedback on performance to individuals is given. Job Developers work with individuals to explain the benefits of working and look for competitive employment opportunities in their communities.

Access and Integration was assessed by reviewing travel training curriculum, community outings and rosters. Individuals working under Valley Collaborative's small business contracts are invited and are encouraged to participate in all company sponsored events as documented by email correspondence with partner sites.

Choice Control and Growth was assessed using the Assessment of Functional Living Skills tool, Sense of Belonging Google survey, and observation of staff competency in using Assistive Technology. Reviews and comparisons of rosters, lesson plans and progress notes were also completed.

At the conclusion of the self-assessment performed by Valley Collaborative it was determined that 100% of Licensure Indicators were met and 100% of Certification Indicators were met. Valley is excited to welcome the DDS Office of Quality Enhancement (OQE) to review this evaluation and is eager to implement and suggestions OQE may have.

LICENSURE FINDINGS

	Met / Rated	Not Met / Rated	% Met
Organizational	7/7	0/7	
Employment and Day Supports	50/50	0/50	
Community Based Day Services Employment Support Services			
Critical Indicators	8/8	0/8	
Total	57/57	0/57	100%
2 Year License			
# indicators for 60 Day Follow-up		0	

CERTIFICATION FINDINGS

	Reviewed By	Met / Rated	Not Met / Rated	% Met
Certification - Planning and Quality Management	DDS 0/0 Provider 6/6	6/6	0/6	
Employment and Day Supports	DDS 14/14 Provider 22/22	36/36	0/36	
Community Based Day Services	DDS 6/6 Provider 8/8	14/14	0/14	
Employment Support Services	DDS 8/8 Provider 14/14	22/22	0/22	
Total		42/42	0/42	100%
Certified				

Survey Detail Report**Back-up documentation**

Licensure Organizational:

Planning and Quality Management

Certification Employment Support Services

Positive Comments on Met Indicators

Indicator	Location	Individual	Positive Comments
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C34 The agency provides the optimal level of support to promote success with a specific plan for minimizing supports.	25 Linnell Circle Billerica MA 01821	DB	Staff had worked successfully to create a job for the individual post back surgery and a long recovery. Working with the employer they created a job at CINTAS, where he had been successfully employed before. The individual now works there daily and requires support only on an as needed basis. Valley Collaborative staff have known him for many years, appreciate his achievements, and encourage the use of natural supports. The individual is well known by CINTAS employees, he will ask them for help as needed, takes breaks with them and is included in the company's social activities. The individual had seriously considered retirement until staff developed this job for him specific to his physical needs and vocational abilities. He takes great pride in his independence and work, and mentors other Valley individuals who come to CINTAS as part of a work-crew.
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MASTER SCORE SHEET LICENSURE**Organizational: Valley Collaborative**

Indicator #	Indicator	Reviewed by	Met/Rated	Rating(Met,Not Met,NotRated)
 L2	Abuse/neglect reporting	DDS	1/1	Met
L3	Immediate Action	Provider	-	Met
L48	HRC	DDS	1/1	Met
L74	Screen employees	Provider	-	Met
L75	Qualified staff	Provider	-	Met
L76	Track trainings	Provider	-	Met
L83	HR training	Provider	-	Met

Employment and Day Supports:

Ind. #	Ind.	Loc. or Individ.	Reviewed by	Emp. Sup.	Cent. Based Work	Com. Based Day	Total Met / Rated	Rating
L1	Abuse/neglect training	I	Provider		-	-	-	Met
L5	Safety Plan	L	Provider		-	-	-	Met
Ⓟ L6	Evacuation	L	DDS			1/1	1/1	Met
L7	Fire Drills	L	Provider		-	-	-	Met
L8	Emergency Fact Sheets	I	Provider		-	-	-	Met
L9	Safe use of equipment	L	Provider		-	-	-	Met
Ⓟ L11	Required inspections	L	DDS			1/1	1/1	Met
Ⓟ L12	Smoke detectors	L	DDS			1/1	1/1	Met
Ⓟ L13	Clean location	L	DDS			1/1	1/1	Met
L14	Site in good repair	L	Provider		-	-	-	Met
L15	Hot water	L	DDS			1/1	1/1	Met
L16	Accessibility	L	Provider		-	-	-	Met
L17	Egress at grade	L	Provider		-	-	-	Met
L18	Above grade egress	L	Provider		-	-	-	Met
L20	Exit doors	L	Provider		-	-	-	Met
L21	Safe electrical equipment	L	Provider		-	-	-	Met
L22	Well-maintained appliances	L	Provider		-	-	-	Met
L25	Dangerous substances	L	Provider		-	-	-	Met
L26	Walkway safety	L	Provider		-	-	-	Met
L28	Flammables	L	Provider		-	-	-	Met
L29	Rubbish/combustibles	L	Provider		-	-	-	Met
L30	Protective railings	L	Provider		-	-	-	Met
L31	Communication method	I	Provider		-	-	-	Met
L32	Verbal & written	I	Provider		-	-	-	Met

L37	Prompt treatment	I	Provider		-	-	-	Met
 L38	Physician's orders	I	DDS			2/2	2/2	Met
L39	Dietary requirements	I	Provider		-	-	-	Met
L44	MAP registration	L	Provider		-	-	-	Met
L45	Medication storage	L	Provider		-	-	-	Met
 L46	Med. Administration	I	DDS			1/1	1/1	Met
L49	Informed of human rights	I	Provider		-	-	-	Met
L50	Respectful Comm.	L	Provider		-	-	-	Met
L51	Possessions	I	Provider		-	-	-	Met
L52	Phone calls	I	Provider		-	-	-	Met
L54	Privacy	L	Provider		-	-	-	Met
L55	Informed consent	I	Provider		-	-	-	Met
L61	Health protection in ISP	I	Provider		-	-	-	Met
L62	Health protection review	I	Provider		-	-	-	Met
L67	Money mgmt. plan	I	Provider		-	-	-	Met
L77	Unique needs training	I	Provider		-	-	-	Met
L79	Restraint training	L	Provider		-	-	-	Met
L80	Symptoms of illness	L	Provider		-	-	-	Met
L81	Medical emergency	L	Provider		-	-	-	Met
 L82	Medication admin.	L	DDS			1/1	1/1	Met
L84	Health protect. Training	I	Provider		-	-	-	Met
L85	Supervision	L	Provider		-	-	-	Met
L86	Required assessments	I	DDS	5/5		2/2	7/7	Met
L87	Support strategies	I	DDS	5/5		2/2	7/7	Met
L88	Strategies implemented	I	Provider		-	-	-	Met
L91	Incident management	L	DDS	1/1		1/1	2/2	Met
#Std. Met/# 50 Indicator							50/50	
Total Score							57/57	
							100%	

MASTER SCORE SHEET CERTIFICATION**Certification - Planning and Quality Management**

Indicator #	Indicator	Reviewed By	Met/Rated	Rating
C1	Provider data collection	Provider	-	Met
C2	Data analysis	Provider	-	Met
C3	Service satisfaction	Provider	-	Met
C4	Utilizes input from stakeholders	Provider	-	Met
C5	Measure progress	Provider	-	Met
C6	Future directions planning	Provider	-	Met

Community Based Day Services

Indicator #	Indicator	Reviewed By	Met/Rated	Rating
C7	Feedback on staff / care provider performance	DDS	3/3	Met
C8	Family/guardian communication	Provider	-	Met
C13	Skills to maximize independence	Provider	-	Met
C37	Interpersonal skills for work	Provider	-	Met
C40	Community involvement interest	DDS	3/3	Met
C41	Activities participation	DDS	3/3	Met
C42	Connection to others	DDS	3/3	Met
C43	Maintain & enhance relationship	DDS	3/3	Met
C44	Job exploration	DDS	3/3	Met
C45	Revisit decisions	Provider	-	Met
C46	Use of generic resources	Provider	-	Met
C47	Transportation to/ from community	Provider	-	Met
C51	Ongoing satisfaction with services/ supports	Provider	-	Met
C54	Assistive technology	Provider	-	Met

Employment Support Services

Indicator #	Indicator	Reviewed By	Met/Rated	Rating
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C7	Feedback on staff / care provider performance	DDS	5/5	Met
C8	Family/guardian communication	Provider	-	Met
C22	Explore job interests	DDS	3/3	Met
C23	Assess skills & training needs	DDS	3/3	Met
C24	Job goals & support needs plan	DDS	3/3	Met
C25	Skill development	DDS	3/3	Met
C26	Benefits analysis	Provider	-	Met
C27	Job benefit education	Provider	-	Met
C28	Relationships w/businesses	Provider	-	Met
C29	Support to obtain employment	DDS	3/3	Met
C30	Work in integrated settings	Provider	-	Met
C31	Job accommodations	Provider	-	Met
C32	At least minimum wages earned	Provider	-	Met
C33	Employee benefits explained	Provider	-	Met
C34	Support to promote success	DDS	5/5	Met
C35	Feedback on job performance	Provider	-	Met
C36	Supports to enhance retention	DDS	5/5	Met
C37	Interpersonal skills for work	Provider	-	Met
C47	Transportation to/ from community	Provider	-	Met
C50	Involvement/ part of the Workplace culture	Provider	-	Met
C51	Ongoing satisfaction with services/ supports	Provider	-	Met
C54	Assistive technology	Provider	-	Met

ADDENDUM OF ISSUES BEYOND THE PROVIDER'S CONTROL:**Certification:**

<u>Employment and Day Supports</u>				
Indicator	Service Type	Location	Individual	Issue
L86 Required assessments concerning individual needs and abilities are completed in preparation for the ISP.	Community Based Day Services	25 LINNELL CIR Billerica MA 01821	MM	The provider agency had not received the required notice to submit the individual's assessments in preparation for his ISP by the request deadline. The individual's ISP date was 4/24/19. The due date for the assessments to be requested was 3/25/19. The assessments were requested on 4/4/19.
L87 Support strategies necessary to assist an individual to meet their goals and objectives are completed and submitted as part of the ISP.	Community Based Day Services	25 LINNELL CIR Billerica MA 01821	MM	The provider agency had not received the required notice to submit the individual's support strategies in preparation for his ISP by the request deadline. The ISP date was 4/24/19. The deadline to request the strategies was 3/25/19. The request was made on 4/4/19.
N/A				

GUARDIAN/FAMILY MEMBER/CITIZEN FEEDBACK ADDENDUM:



Alternative & Transitional Programming Middle School and High School

40 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * www.valleycollaborative.org

MEMORANDUM

To: Dr. Chris A. Scott, Executive Director
From: Chrystalia Metrakas, Joseph Venskus, Glen Costello and Robert Nimblett
Date: December 12, 2019
Re: High School Trips: Canadian Maritimes and Mt. Baker, Washington

On May 11, 2020, our Valley travelers will be embarking on a new adventure to the Canadian Maritimes. Students and individuals from our adult program are all excited to see a new area of North America! The trip will give opportunities to our Valley travelers to enjoy the Canadian nature and learn about some of the local history.

Day 1 Hello Halifax

Meet your tour director
[Harbour Hopper](#) ↗
Dinner
Ghost Tour

Day 2 Halifax landmarks

Breakfast
[Peggy's Cove visit](#) ↗
[Halifax guided sightseeing tour](#) ↗
Halifax Public Gardens visit, Fairview Lawn Cemetery
visit, Halifax waterfront
Dinner Cruise

Day 3 Halifax--Charlottetown

Breakfast
Travel to Charlottetown
[Anne of Green Gables Museum visit](#) ↗
Green Gables Heritage Place Visit
Dinner

Day 4 Charlottetown--Halifax

Breakfast
[Charlottetown tour director-led sightseeing](#) ↗
Beaconsfield Historic House visit, Confederation Centre of
the Arts visit, Victoria Park, Historic Great George Street
Travel to Halifax
Dinner

Day 5 End tour

Breakfast
[Halifax Citadel National Historic Site visit](#) ↗



Alternative & Transitional Programming Middle School and High School

*40 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * www.valleycollaborative.org*

In July 2020, our Valley travelers will be embarking on a new adventure to the Mt. Baker in Washington. Students and individuals from our Alternative High School are all excited to hike to new heights.

With the guidance, knowledge, and expertise of Northeast Mountaineering; students and staff from Valley will embark on this adventure that is sure to create life long memories.

Itinerary:

- Day One: Arrival into Seattle and drive to North Cascades. Meet the NEM guides at the campground and gear check. Overnight in tents at campground.
- Day Two: Climb to High Camp. Overnight in tents.
- Day Three: Summit attempt and descend to the cars. Overnight in tents.
- Day Four: Weather contingency day. Overnight in tents at campground.
- Day Five: Drive back to Seattle. Afternoon flight home.

Required Action:

None

Attachments:

None



Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Communications

The following communications are attached for your review:

Making a Difference Awards

- Students, Adult and Staff of the Month

School Monthly Updates

- Elementary School Updates
- Alternative Programming Middle School and Transitional High School Updates
- Transitional Programming Middle School and Transitional High School Updates
- Adult Program Updates

Community and Staff Feedback

- QUEST Audit Email from Michelle Stomboly-Lorenzo
- QUEST Audit Email from Heather Valcanas
- Happy Thanksgiving Email

Community Relations

- Thank you Email from John Crocker
- Replacement Window Email from Tom Gibson

Attachments:

Monthly Program Updates
QUEST Audit Email from Michelle Stomboly-Lorenzo
QUEST Audit Email from Heather Valcanas
Happy Thanksgiving Email
Thank you Email from John Crocker
Replacement Window Email from Tom Gibson



Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Making a Difference – Students, Adult and Staff of the Month Awards

We would like to recognize Valley's student and staff members of the month from the Elementary, Middle, and High Schools as well as an adult from the Adult Services Program for all their hard work and dedication to the Collaborative.

Valley Elementary School

Student of the Month: **Max Brown**

Staff of the Month: **Kathryn Mari**

Valley Alternative Programming Middle and High School

Student of the Month: **Luis Algarin**

Staff of the Month: **Corey Shepherd**

Valley Transitional Programming Middle and High School

Student of the Month: **Corey Erickson**

Staff of the Month: **Tammy Richard**

Valley Adult Services

Adult of the Month: **Julia McNally**

Staff of the Month: **Christine Joslin**

Valley Staff of the Month

Ian MacAulay

Required Action:

None

Attachments:

None



Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Communications – School Monthly Updates

The following Monthly Updates are attached for your review:

- Elementary School Updates
- Alternative Programming Middle School and Transitional High School Updates
- Transitional Programming Middle School and Transitional High School Updates
- Adult Program Updates

Required Action:

None

Attachments:

Elementary School Updates
Alternative Programming Middle School and Transitional High School Updates
Transitional Programming Middle School and Transitional High School Updates
Adult Program Updates

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Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Monthly Update from
Jennifer Bergeron, Co-Principal Elementary School
Heather Mackay, Co-Principal Elementary School

The start of December has been an exciting and busy time at the Elementary school.

We held our annual Thanksgiving Brunch on November 27th. Students and families attended a family style brunch with entertainment provided by our music therapist Bryan Thomas and his percussion students. We had an amazing turnout with over 30 families attending. It was wonderful to see families, students and teachers interact, laugh and enjoy some home cooked food together.

The teachers have participated in a number of field trips this past month that have included Life Skills community trips. Students are preparing for this holiday season by participating in a school wide act of giving. Gifts have been identified for each student by another student and will be shared with one another in the month of December.

Progress reports for the first quarter were sent out to all families and districts in the third week of November. We are continuing to tour new students from a number of districts that include Amherst NH, Bedford NH, Clinton Mass and Lynn MA. IEP and team meetings are ongoing and four new students are beginning enrollment in December, bringing our current enrollment to 79.

Looking forward we are preparing for our annual Holiday Festivities that include a field trip to Carleton-Willard Village in Bedford MA for our chorus students to perform for adults receiving care at the facility. We also are holding a winter clothing drive for students in need, donating collected items for the Lowell Humane Society and hosting our Giving Tree. The Giving Tree is an annual tradition at the elementary school that identifies families in need of holiday gifts. Our staff and families chose an ornament with the items and provide the gifts to the families prior to the Holiday break.

Thank you for your continued support.

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Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Monthly Update from
Julie Fielding, Principal Alternative Programming
Valley Middle School and Valley Transitional High School

December is looking to be a very busy month. There are many IEP meetings, 3 year evaluations and tours scheduled. By the end of December we will be midway through the second semester! Construction is finally all approved by the town and we will prioritize where to start.

The Vocational Program will have the chance to go to the Museum of Science, Frog Pond, Roller Kingdom, the Freedom Trail and movies.

The Alt Program will have the chance to go to the Sports Museum, You're Fired, 3 Trolls and hiking.

The Middle School will be going to Boda Borg, You're Fired, Frog Pond and hiking.

The programs will each be celebrating the holidays with their own activities.

The Student Leadership Conference at Disney leaves this Thursday and will return on Sunday. The students are very excited. Brittany Maiuri will be the chaperone for the Alt students.

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Central Administration Office

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Monthly Update from
Nicole Noska, Principal Transitional Programming
Valley Middle School and Valley Transitional High School

Mid-November to date has been a busy month. On November 26th, the students in the Transitional Programs in both the middle and high school came together to break bread and celebrate Thanksgiving. Each classroom shopped, prepped, and prepared either a side or a main dish or dessert for the 13 classrooms that joined us at the feast. It is always so touching to hear what students are thankful for...many of them enthusiastically share that it is their friends and teachers at Valley.

Students enjoyed several field trips over the past month, including: bowling at Wamesit Lanes, Boston Aquarium, and the Enchanted Village. Students are working on their functioning skills in the community this holiday season with activities such as budgeting for Christmas gifts and travel training on trips by bus and train. Upcoming trips to round off December include Faneuil Hall for the tree lighting, adapted ice skating, and taking in a trip to the North Shore Music Theater to see A Christmas Carol.

The rec program continues to be a hit each week amongst the students and with the trips offered over the past month, it's easy to see why. Students participated in social events such as learning soccer skills at TC's Training Center, cooking night, holiday crafting, holiday shopping at the mall, seeing the movie Jumanji, and the culminating event of the month-the Winter Dance!

The reading initiative that has taken off at the middle school level continues, and Linnell Circle's reading specialist, Nick LeClair, has now been integrating into the high school classrooms over the past few months. He has worked with teachers on assessing students and putting interventions in place to help students with significant gaps in their reading skills. Our 9th and 10th grade students are feeling a sense of pride and success with the skills that they are gaining.

On the vocational side of things, we have had two students start independent internships in their home communities. The students will be aging out of school services at the end of this school year and Vocational Coordinator, Scott Morin, has been working diligently with the students to help provide them with opportunities closer to home.

Referrals continue to come in and two students from member districts started in mid-November. We have one non-member high school student starting on Monday, December 9th.

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Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Monthly Update from
Kate Poulin – Assistant Director of Adult Services

Our Thanksgiving Day luncheon was a success; over 140 meals were served! Individuals and staff enjoyed spending time together; many shared stories of what they were thankful for, almost everyone danced and/or sang after our delicious feast.

This month one new individual will start the program. We are continuing to set up tours for individuals and are reviewing incoming referrals from Service Coordinators.

December's individual of the month is Julia McNally. Julia has attended the Today and Tomorrow Program for about 23 years. Julia works at Cross Point in the café; her job duties are ensuring tables are cleared and cleaned, chairs are cleaned and pushed into tables, items such as napkins are restocked as needed, maintaining a clean floor. In the gym, she helps to sanitize all of the exercise equipment. Julia does a great job at work and is helpful to coworkers. We are grateful that she is on our team!

Christine Joslin is awarded staff of the month for her contributions as a Vocational Job Coach. She is responsible for the following job sites: Curriculum Associates, three days a week; Billerica Housing Authority, one day a week; then she floats to any site on Thursdays. She is a versatile coworker and can handle any job site. Christine always finds solutions when needed. She continues to tell me, "Valley is my family." We are delighted to have her as a member of our team and our Valley family.

Our job development team has secured a second day of work at Kmart for Mindy Malas. Originally, Mindy worked Mondays; now her schedule is Monday and Thursday. The team has secured another day of work for Melania Chaput at TJ Maxx, increasing her schedule to a total of four days a week.

Career Planning focused on the following curriculum: Managing Emotions at Work and Accepting Responsibility at Work. The group did a job exploration at the Shawsheen Valley Technical High School bakery. Another lesson was making homemade chocolate chip cookies. Veteran's Day included card making for service men and women who are deployed overseas. They were invited to attend *The Peanut Butter Falcon* movie at the Tewksbury Public Library. The group had fun attending Coffee with a Cop.

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CBDS worked on curriculum for Healthy Eating and Protecting Oneself During Cold and Flu Season. They did weekly community outreach activities for Meals on Wheels, Merrimack Valley Food Pantry, Project Learn, and Recycling for Valley Collaborative locations and Quanterix. Activities that individuals could choose to participate in were: making cards for veterans, attend a Christmas Carol play at the North Shore Music Theater, deliver fundraising money for breast cancer to the American Cancer Society, holiday Ceramics, Mindful Yoga, Yoga for Good (a more traditional yoga class), Coffee with a Cop, music classes, and Book Club at the Pollard Memorial Library in Lowell.



Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Communications – Community and Staff Feedback

The following Community and Staff Feedback is attached for your review:

- QUEST Audit email from Michelle Stomboly-Lorenzo
- QUEST Audit email from Heather Valcanas
- Happy Thanksgiving email

Required Action:

None

Attachments:

QUEST Audit email from Michelle Stomboly-Lorenzo
QUEST Audit email from Heather Valcanas
Happy Thanksgiving email

Building a community that empowers children and adults to find their own way.

From: [Stomboly-Lorenzo, Michelle \(DDS\)](#)
To: [Chris Scott](#)
Subject: RE: Draft Provider Report
Date: Friday, November 22, 2019 8:52:27 AM

Chris,
Congratulations to you and your team! The hard work was apparent throughout the survey review, and the survey team was quite impressed with your agency and the outcomes!

Happy Thanksgiving to you as well!

Michelle Stomboly-Lorenzo
Director of Quality Enhancement, Northeast Region
978-774-5000, ext. 304
Michelle.Stomboly-Lorenzo@state.ma.us

From: Chris Scott [<mailto:cscott@valleycollaborative.org>]
Sent: Thursday, November 21, 2019 3:41 PM
To: Stomboly-Lorenzo, Michelle (DDS) <Michelle.Stomboly-Lorenzo@MassMail.State.MA.US>
Subject: FW: Draft Provider Report

Hi Michelle,

Thanks for all your guidance.

We listened – we learned – and it paid off. ☺

Happy Thanksgiving to you and yours!

Best Always,

-Chris

Chris A. Scott, Ph.D.
Executive Director



25 Linnell Circle
Billerica, MA 01821
978-528-7826

From: Chris Scott

Sent: Thursday, November 21, 2019 11:22 AM

To: 'Goldberg, Steven (DDS)' <steven.goldberg@state.ma.us>

Cc: 'Marshall, Tom (DDS)' <tom.marshall@state.ma.us>; 'sharon.brown@state.ma.us' <sharon.brown@state.ma.us>; Heather Valcanas <hvalcanas@valleycollaborative.org>; Katherine Poulin <kpoulin@valleycollaborative.org>; Joseph Venskus <jvenskus@valleycollaborative.org>; Matthew Gentile <mgentile@valleycollaborative.org>

Subject: RE: Draft Provider Report

Good Morning Steven,

This is great news. Also, thanks to the DDS team for their guidance over the last two years. We love serving our individuals – it's such rewarding work.

Sincerely yours,

-Chris

*Chris A. Scott, Ph.D.
Executive Director*



*25 Linnell Circle
Billerica, MA 01821
978-528-7826*

From: Goldberg, Steven (DDS) [<mailto:steven.goldberg@state.ma.us>]

Sent: Thursday, November 21, 2019 9:27 AM

To: Heather Valcanas <hvalcanas@valleycollaborative.org>; Katherine Poulin <kpoulin@valleycollaborative.org>; Chris Scott <cscott@valleycollaborative.org>

Subject: Draft Provider Report

Good morning. Attached is the draft provider report for your review. Also attached are feedback forms for individuals and staff to utilize. We do use and appreciate the feedback.

100% of indicators were rated as met, congratulations. Please take a close look at the report and let us know of any errors or inaccuracies. We can make any changes prior to the service enhancement meeting. There is also a five day window post the SEM, after that the report will be finalized.

The SEM is scheduled for Monday morning November 25, 2019, 9:30, at 25 Linnell Circle, Billerica.

Thank you and all the staff and individuals at Valley Collaborative for their cooperation and

responsiveness during the survey.

Steve

*Steven Goldberg, LICSW
Quality Enhancement Specialist, DDS Northeast Region
Hogan Regional Center, PO Box A, Hathorne MA 01937
978-774-5000 ext 561*

"The end we seek is a society at peace with itself, a society that can live with its conscience"

Martin Luther King Jr., March 25, 1965

When writing or responding, please remember that the Secretary of State's Office has determined that email is public record.

From: [Heather Valcanas](#)
To: [Chris Scott](#); [Katherine Poulin](#); [Joseph Venskus](#); [Matthew Gentile](#); [Sean Curran](#); [Darren Goad](#); [Lisa Phillion](#); [Jonathan Taylor](#); [Collette Elliott](#); [Denise Stuart](#); [Susan Totton](#); [Elizabeth Tanguay](#); [Christopher Duchesne](#); [Robert Perkins](#); [Katlyn Winch](#); [Deneen Cymbura](#); [David Ouellet](#); [Melissa Alexa](#); [Patricia Evans](#); [Michael O'Connor](#); [Patricia Sicard](#); [Carisa Castro](#); [Sokkhunna Horn](#); [Brenda Kenney](#); [Michele Lyons](#); [Theresa Erickson](#); [Christine Joslin](#); [Alison Dunbar](#); [Angela Fiset](#); [John Resteghini](#); [Christopher Woodward](#); [Kelley Goad](#); [Nikki Gounaris](#); [Joseph Langlois](#); [Cristen Tryder](#)
Subject: RE: QUEST Audit
Date: Thursday, November 21, 2019 1:47:27 PM

Thank you Chris, we have an amazing team.

Thank you all for your hard work and your commitment to making this program stand out in the state.

The individuals who come to us are lucky to have you!

Best,

Heather



Heather Valcanas
Director of Adult and Transitional Services (Interim)
(978) 528-7892

From: Chris Scott
Sent: Thursday, November 21, 2019 1:20 PM
To: Heather Valcanas <hvalcanas@valleycollaborative.org>; Katherine Poulin <kpoulin@valleycollaborative.org>; Joseph Venskus <jvenskus@valleycollaborative.org>; Matthew Gentile <mgentile@valleycollaborative.org>; Sean Curran <scurran@valleycollaborative.org>; Darren Goad <dgoad@valleycollaborative.org>; Lisa Phillion <lphillion@valleycollaborative.org>; Jonathan Taylor <jonathantaylor12x@gmail.com>; Collette Elliott <celliot@valleycollaborative.org>; Denise Stuart <dstuart@valleycollaborative.org>; Susan Totton <stotton@valleycollaborative.org>; Elizabeth Tanguay <etanguay@valleycollaborative.org>; Christopher Duchesne <cduchesne@valleycollaborative.org>; Robert Perkins <rperkins@valleycollaborative.org>; Katlyn Winch <kwinch@valleycollaborative.org>; Deneen Cymbura <dcymbura@valleycollaborative.org>; David Ouellet <douellet@valleycollaborative.org>; Melissa Alexa <malexa@valleycollaborative.org>; Patricia Evans <pevans@valleycollaborative.org>; Michael O'Connor <moconnor@valleycollaborative.org>; Patricia Sicard <psicard@valleycollaborative.org>; Carisa Castro <ccastro@valleycollaborative.org>; Sokkhunna Horn <shorn@valleycollaborative.org>; Brenda Kenney <bkenney@valleycollaborative.org>; Michele Lyons <milyons@valleycollaborative.org>; Theresa Erickson <terickson@valleycollaborative.org>; Christine Joslin <[cjostin@valleycollaborative.org](mailto:cjoslin@valleycollaborative.org)>; Alison Dunbar <adunbar@valleycollaborative.org>; Angela

Fisette <afisette@valleycollaborative.org>; John Resteghini <jresteghini@valleycollaborative.org>; Christopher Woodward <cwoodward@valleycollaborative.org>; Kelley Goad <kgoad@valleycollaborative.org>; Nikki Gounaris <ngounaris@valleycollaborative.org>; Joseph Langlois <jlanglois@valleycollaborative.org>; Cristen Tryder <ctryder@valleycollaborative.org>

Subject: QUEST Audit

Dear Team,

Thank you for all your hard work – it paid off!

You are on the ‘A Team’.

We just received 100% on the QUEST Audit.

With great respect and appreciation,

-Chris

Chris A. Scott, Ph.D.
Executive Director



25 Linnell Circle
Billerica, MA 01821
978-528-7826

From: [Donna Driscoll](#)
To: [Chris Scott](#)
Subject: RE: Happy Thanksgiving
Date: Monday, November 25, 2019 8:00:02 AM

Happy Thanksgiving to you and yours too Chris!

We are Blessed to have you leading the team!

Warmest regards,
Donna

Donna Driscoll
Valley Collaborative
135 Coburn Road
Tyngsboro, MA 01879
978-528-7843

From: Chris Scott
Sent: Monday, November 25, 2019 7:50 AM
To: Collaborative
Subject: Happy Thanksgiving

Dear Valley Team,

I am writing to wish each of you a Happy Thanksgiving! I hope you get time to enjoy family and friends.

We have many things to be thankful for this season. I am grateful to have the opportunity to work with such an amazing team of professionals. As you are all aware, Valley impressively scored 100% on the Massachusetts Department of Elementary and Secondary Education Programmatic Audit and last week received 100% on its Massachusetts Department of Developmental Services QUEST Audit. Also, I am proud to say Valley just received a perfect Financial Audit. It takes a lot of work, commitment and dedication to be on the 'A Team'. I understand it is not for everyone but for those who consider this work a calling, the hard work is all worth it.

Thank you for your strong work ethic, many acts of kindness and principled approach to the work. I am grateful for the opportunity to be able to work alongside you serving the most vulnerable among us – it's meaningful, rewarding work.

Gratefully yours,

-Chris

Chris A. Scott, Ph.D.
Executive Director



Central Administration Office

25 Linnell Circle, Billerica MA 01821 * Tel: (978)528-7800 * <http://www.valleycollaborative.org>

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: December 12, 2019
Re: Communications – Community Relations

The following Community Relations is attached for your review:

- Thank you email from John Crocker
- Replacement Window email from Tom Gibson

Required Action:

None

Attachments:

Thank you email from John Crocker
Replacement Window email from Tom Gibson

From: [Crocker, John](#)
To: [Chris Scott](#)
Subject: Thank you
Date: Thursday, November 21, 2019 6:42:15 PM

I know we are a few weeks removed from the event, but I wanted to send a heartfelt thank you to you and your team for hosting the MASMHC meeting recently. What an amazing staff and such gracious hosts. I feel lucky to have had the opportunity to work with them. I hope we can connect in the future, and I wish you and your family a very happy Thanksgiving!

John Crocker, M.Ed.
Director of School Mental Health & Behavioral Services
Methuen Public Schools
978-722-6000 ext: 1154

[Ranger Pride](#)

From: [Tom Gibson](#)
To: [Chris Scott](#); [Lisa Maloney](#)
Cc: [Joe Fuller](#)
Subject: RE: Replacement Window in Office at Valley
Date: Friday, November 22, 2019 12:30:37 PM

Thank you Chris, and same to you and your staff.

Tom

Thomas F. Gibson, Chairman
Middlesex County Retirement Board
P.O. Box 160
25 Linnell Circle
Billerica, MA 01865
TEL: 978-439-3000
FAX: 978-439-3051
E: tgibson@middlesexretirement.org

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From: Chris Scott <cscott@valleycollaborative.org>
Sent: Friday, November 22, 2019 12:28 PM
To: Tom Gibson <tgibson@middlesexretirement.org>; Lisa Maloney <lmaloney@middlesexretirement.org>
Cc: Joe Fuller <jfuller@middlesexretirement.org>
Subject: Replacement Window in Office at Valley

Good Afternoon Tom and Lisa,

I hope everything is well with you.

I wanted to reach out and thank you for arranging to have the window replaced in the Deputy Director's office. The work was completed yesterday and we love the new window.

Happy Thanksgiving!

Sincerely,

Your appreciative tenant,

-Chris

Chris A. Scott, Ph.D.
Executive Director



*25 Linnell Circle
Billerica, MA 01821
978-528-7826*

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