

**Valley Collaborative
Board of Directors Meeting
25 Linnell Circle, Billerica, Massachusetts
Thursday, September 19, 2019 ▪ 10:00 a.m.**

Action Required

- I. Approval of Minutes
 - a. Board of Directors, General Session: June 6, 2019
- II. FY'19 Financial Update
 - b. FY'19 Update
 - c. Treasurer's Report
 - d. Distribution of Surplus Funds for FY'19
 - e. PARS Statement
- III. Valley Organizational Chart
- IV. Adult Services Policy Manual

No Action Required

- V. Tyngsborough Renovation Update
- VI. Valley Collaborative District Five Year Improvement Plan Update – Dr. Lori Likis, Principal Consultant
- VII. Overview of New Valley Website
- VIII. Transportation Update
- IX. Communications
 - Staff Orientation Day
 - a. Staff Orientation Day Memo to Staff
 - b. Staff Orientation Day Agenda
 - c. Photos from Orientation Day
 - Organizational Charts
 - d. FY'20 Valley Organizational Chart
 - e. FY'20 Adult Services Organizational Chart
 - State Agencies
 - f. Massachusetts Office on Disability (MOD)
Emergency Preparedness Training
 - Valley Extra Curricular
 - g. Climbing Mt. Chocorua

School Monthly Updates

- h. Elementary School Updates
- i. Alternative Programming Middle School and Transitional High School Updates
- j. Transitional Programming Middle School and Transitional High School Updates
- k. Adult Program Updates

Community/Staff Feedback

- l. Email from Lowell Special Education Evaluation Team Chairperson
- m. Staff Communication
- n. Sean Curran's 30th Anniversary at Valley

Parent Communications

- o. Elementary School

Resignation Letters

- p. Annie Willis
- q. Laura McGloine

MOEC Treasurer's Report

- r. Memo/Report





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: September 19, 2019
Re: Approval of Minutes

Attached please find the following minutes:

- a. Board of Directors, General Session: June 6, 2019

Required Action:

Vote to approve the minutes:

- a. Board of Directors, General Session: June 6, 2019

Attachments:

Board of Directors, General Session: June 6, 2019

**Valley Collaborative Board of Directors
General Session Meeting Minutes
June 6, 2019
10:03 a.m. – 11:52 a.m.
25 Linnell Circle, Billerica, MA**

Board Members Present: Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Denise Pigeon, Mr. Everett Olsen, Dr. Jay Lang, Dr. Laura Chesson

Board Members Absent: Mr. Steven Stone, Mr. Christopher Malone

Collaborative Representatives Present: Dr. Chris Scott, Executive Director; James George, Accountant; Ms. Heidi Kriger, Treasurer; Members of the Collaborative Senior Leadership Team

Also Present: Mr. 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. Timothy Piwowar and Dr. Chris Scott welcomed all in attendance to the Collaborative's year end meeting. Dr. Scott introduced guests in attendance.

[Dr. Jay Lang arrived at 10:05 a.m.]

Dr. Scott introduced the performances of the elementary and middle/high school students in attendance.

[Mr. Everett Olsen arrived at 10:13 a.m.]

Financial Update – Valley by the Numbers

Dr. Chris Scott presented to the Board her annual Valley by the Numbers, which included analytical review, fun facts, achievements and survey results. A copy of her PowerPoint presentation was included within the Board materials.

Making a Difference Awards

Dr. Scott and the Collaborative Senior Leadership team introduced the Students, Adult and Staff of the Month. The Board acknowledged their respective contributions and achievements.

The Board also recognized those employees retiring from the Collaborative and thanked them for their contributions and service to the Collaborative.

Dr. Scott and Mr. Everett Olsen presented the "Everett V. Olsen Award", which recognizes the Collaborative student with the highest academic honors.

Dr. Scott and Dr. Anthony Bent presented Kari Morin the “Dr. Anthony Bent Leadership Award”, which recognizes and acknowledges the leadership and contributions of a Collaborative staff member.

Dr. Scott presented the “Community Leader” award to Robert George of the Massachusetts Teachers’ Retirement System.

Dr. Scott recognized the Westford Public Schools as a significant partner of the Collaborative. Mr. Everett Olsen accepted the award on behalf of Westford.

Valley Collaborative Selected as Winner of Best DDS Promotional Video

Dr. Scott introduced Ms. Kelly Lawless and Ms. Cindy O’Donnell from the Department of Developmental Services, who recognized the Collaborative’s selection as the winner of the best DDS promotional video in the Commonwealth.

Approval of Minutes

Mr. Timothy Piwowar asked for motions relating to the available meeting minutes.

On a motion made by Mr. Everett Olsen 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 Board of Directors dated April 12, 2019.

The vote was 4-0-3. Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Jay Lang and Dr. Denise Pigeon voted yes. Dr. Laura Chesson, Mr. Brad Morgan and Mr. Everett Olsen abstained.

On a motion made by Mr. Everett Olsen 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 May 2, 2019.

The vote was 3-0-4. Mr. Timothy Piwowar, Mr. Everett Olsen and Dr. Jay Lang voted yes. Dr. Michael Flanagan, Dr. Denise Pigeon, Dr. Laura Chesson and Mr. Brad Morgan abstained.

On a motion made by Mr. Everett Olsen 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 May 8, 2019.

The vote was 3-0-4. Mr. Timothy Piwowar, Mr. Everett Olsen and Dr. Jay Lang voted yes. Dr. Michael Flanagan, Dr. Denise Pigeon, Dr. Laura Chesson and Mr. Brad Morgan abstained.

On a motion made by Mr. Everett Olsen 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 Board of Directors dated May 9, 2019.

The vote was 4-0-3. Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Jay Lang and Mr. Everett Olsen voted yes. Dr. Laura Chesson, Mr. Brad Morgan and Dr. Denise Pigeon abstained.

Board Governance 2018-2019

Elect Board Chairperson and other Board Positions

Mr. Timothy Piwowar referenced the Collaborative Agreement that provides that the Board shall, annually during the final scheduled meeting of the school year, organize itself by electing a Chairperson and any other Board positions deemed appropriate by the Board. In addition, the Chairperson, with the majority vote of the Board, may appoint such committees and subcommittees of the Board. The Board discussed candidates for Chairperson.

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

VOTED: That the Board of Directors elects Mr. Timothy Piwowar as the Chairperson of the Board of Directors for the 2019-2020 School Year.

The vote was 7-0. Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Laura Chesson, Mr. Everett Olsen, Mr. Brad Morgan, Dr. Denise Pigeon and Dr. Jay Lang voted yes.

Appoint/Re-appoint Committee Members

On a motion duly made by Dr. Denise Pigeon and seconded by Mr. Brad Morgan, a quorum of voters being present, it was voted:

VOTED: That the Board of Directors approves the appointment of Mr. Timothy Piwowar, Dr. Jay Lang, Dr. Michael Flanagan and Mr. Everett Olsen as Members of Executive Committee for the Board of Directors for the 2019-2020 School Year.

The vote was 7-0. Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Laura Chesson, Mr. Everett Olsen, Dr. Denise Pigeon, Mr. Brad Morgan and Dr. Jay Lang voted yes.

Treasurer's Report

Ms. Heidi Kriger, the Collaborative Treasurer, provided the Board with her report. Ms. Kriger provided a verbal summary of her report, including available balances, transfers, withdrawals, OPEB trust amounts, interest income and ending balances. A written summary report was contained within the Board materials.

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

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

The vote was 7-0. Mr. Timothy Piwovar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Dr. Laura Chesson, Mr. Brad Morgan and Dr. Jay Lang voted yes.

Treasurer Evaluation/Contract

Mr. Timothy Piwovar stated that the Board is required to annually evaluate the Treasurer's performance and effectiveness. Mr. Timothy Piwovar referenced Ms. Kriger's completed evaluation as "exemplary". There was no further discussion.

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

VOTED: That the Board of Directors accepts the evaluation of the Collaborative Treasurer, Ms. Heidi Kriger, and requests that a copy of the written evaluation be filed within the Treasurer's file maintained at the Collaborative.

The vote was 7-0. Mr. Timothy Piwovar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Dr. Laura Chesson, Mr. Brad Morgan and Dr. Jay Lang voted yes.

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 authorizes the Chairman, to finalize and execute an agreement by and between the Collaborative and Ms. Heidi Kriger, as its Treasurer, for the 2019-2020 School Year with the term of the agreement to be July 1, 2019 through June 30, 2020.

The vote was 7-0. Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Dr. Laura Chesson, Mr. Brad Morgan and Dr. Jay Lang voted yes.

Financial Update Continued

Dr. Chris Scott presented to the Board the Collaborative's Quarterly Financial Update and Year End Projection. Dr. Scott reviewed the Collaborative's anticipated revenues and expenses as compared to the Fiscal 2019 budget. Dr. Scott reviewed enrollment figures from member and non-member districts. Dr. Scott reviewed the material factors that impacted the Budget and requested a motion to amend the Fiscal 2019 Budget. Mr. Timothy Piwowar acknowledged the Collaborative's efforts this year with the variables and difficult decisions presented this School Year as reviewed throughout the year and summarized during the meeting. The Board had no further questions.

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

VOTED: That the Board of Directors agrees to amend the FY 2019 Budget, including an amended Operating Expense Budget in the amount of \$19,268,250 as presented and recommended by the Executive Director.

The vote was 7-0. Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Dr. Laura Chesson, Mr. Brad Morgan and Dr. Jay Lang voted yes.

Distribution of Surplus Funds to Member Districts

The Collaborative agreement and collaborative regulations provide that the Board shall vote annually to determine whether cumulative surplus funds will be retained by the Collaborative or whether all or some percentage of such funds will be distributed to the member districts or credited to support programs and services offered to member districts. Further, in the event that an amount of cumulative surplus funds is to be distributed or credited to the member districts, each member district's share will be apportioned in accordance to its tuition payments to the Collaborative for the previous fiscal year. Dr. Chris Scott and the Board discussed the Collaborative's current finances and cumulative surplus funds. Dr. Scott informed the Board that the Collaborative's independent auditors and internal accountant each had reviewed the calculations with respect to the surplus funds. Mr. Timothy Piwowar stated that the surplus funds were an estimate and would be finalized after the fiscal year audit. A further discussion was held.

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

Voted: That the Board of Directors hereby authorizes the distribution of \$500,000 in surplus funds to its member districts based on the percentages and methodology discussed at this meeting, specifically an allocation based on the FY2019 tuitions payments to the Collaborative, with such distribution being in the form of either a tuition credit to the member district school committee or cash payment to the member district town, as to be determined by the respective member district.

The vote was 7-0. Mr. Timothy Piwovar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Dr. Laura Chesson, Mr. Brad Morgan and Dr. Jay Lang voted yes.

Executive Director Evaluation

Mr. Timothy Piwovar stated that the Board is required to annually evaluate the Executive Director's performance and effectiveness in implementing the programs, policies and goals of the Collaborative. Mr. Piwovar referenced the completed evaluation of Dr. Scott, reading certain excerpts from the exemplary performance review for Dr. Scott. The Board expressed their collective gratitude for the continued exemplary work completed at the Collaborative but both Dr. Scott and the Collaborative staff and employees.

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

VOTED: That the Board of Directors accepts the evaluation of the Collaborative Executive Director, Dr. Chris A. Scott, as presented at this meeting, and requests that a copy of the written evaluation be finalized and filed within the Executive Director's file maintained at the Collaborative.

The vote was 7-0. Mr. Timothy Piwovar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Dr. Laura Chesson, Mr. Brad Morgan and Dr. Jay Lang voted yes.

Business Manager (Accountant)

Mr. Timothy Piwovar stated that under the Collaborative Agreement the Board is required to annually evaluate the performance and effectiveness of its business manager. Mr. Piwovar referenced the completed evaluation of Mr. Jim George as "exemplary". The Board discussed.

On a motion made by Mr. Brad Morgan and seconded by Mr. Everett Olsen, a quorum of voters being present, it was voted:

VOTED: That the Board of Directors accepts the evaluation of the Collaborative Accountant as presented at this meeting, and requests that a copy of the written evaluation be finalized and filed within his file maintained at the Collaborative.

The vote was 7-0. Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Mr. Brad Morgan, Dr. Laura Chesson and Dr. Jay Lang voted yes.

Tyngsborough Lease Amendment

Dr. Scott, Mr. Flanagan and the Collaborative's counsel directed the Board to the lease amendment to the lease agreement with the Town of Tyngsborough and Tyngsborough School Committee. The amendment memorialized the changes to the capital improvement funding amounts and schedule, and the extended term at the agreed upon reduced rent amounts. The lease amendment had been approved by Tyngsborough. There was no further discussion.

On a motion made by Mr. Brad Morgan and seconded by Mr. Everett Olsen, a quorum of voters being present, it was voted:

VOTED: That the Board of Directors authorizes the Board Chair to finalize, approve and deliver, on behalf of the Board of Directors, a lease amendment to the lease agreement with Tyngsborough, under the substantive terms and conditions, including capital improvement funding, presented at this meeting, and further authorizes the Board Chair to execute such lease amendment on behalf of the Board of Directors.

The vote was 6-0-1. Mr. Timothy Piwowar, Mr. Everett Olsen, Dr. Denise Pigeon, Mr. Brad Morgan, Dr. Laura Chesson and Dr. Jay Lang voted yes. Dr. Michael Flanagan abstained.

Approval of 2019-2020 Employee Handbook

Dr. Scott and counsel presented the revised employee handbook. There was no further discussion.

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

VOTED: That the Board of Directors approves the revised Employee Handbook in the substantive form presented at this meeting.

The vote was 7-0. Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Mr. Brad Morgan, Dr. Laura Chesson and Dr. Jay Lang voted yes.

Approval of 2018-2019 Student Handbook

Dr. Scott and counsel informed the Board that there were no substantive revisions to the Collaborative student handbook.

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

VOTED: That the Board of Directors approves the Student and Family Handbook in the substantive form presented at this meeting.

The vote was 7-0. Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Denise Pigeon, Mr. Brad Morgan, Dr. Laura Chesson and Dr. Jay Lang voted yes.

Miscellaneous

Mr. Timothy Piwowar informed the Board that the Valley Collaborative District Five Year Improvement Plan Update with Lori Likis would be continued to the Board's meeting in September 2019.

Dr. Scott provided the Board with an update to the extracurricular fundraising efforts, which had raised approximately \$8,000 to date.

Dr. Scott referred the Board to the Board materials which contained several communications received since the last Board meeting.

Dr. Scott and the Board thanked all for a wonderful school year and wished everyone a happy and safe summer.

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

VOTED: To adjourn the Board meeting.

The vote was 7-0. Mr. Timothy Piwowar, Dr. Michael Flanagan, Dr. Laura Chesson, Mr. Everett Olsen, Dr. Denise Pigeon, Mr. Brad Morgan and Dr. Jay Lang voted yes.

Mr. Timothy Piwowar adjourned the Collaborative Board Meeting at 11:52 a.m.

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

- School Year 2018-2019 Electronic Board Binder for June 6, 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 Scott, Executive Director
Date: September 19, 2019
Re: Financial Update Memo - FY'19

- The financial position of the Collaborative remains very strong. The total assets at June 30, 2019 is \$18,559,089 (unaudited). This includes \$3,547,549 (unaudited) held in the OPEB Trust at June 30, 2019.
- Change in net assets from operations in FY'19 was approximately \$826,000 as a result of strong management of Collaborative expenses and personnel costs while continuing to meet the needs of the students and adult clients the Collaborative serves.
- The Collaborative's cash position remains solid with over \$9.9 million (\$4.6 million unrestricted and \$4 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.
- In the spirit of continuous improvement, the Collaborative made capital purchases of \$680,774 in FY'19 for Vehicles, Furniture, Technology and Improvements.
- We are still in the process of completing our FY'19 financial audit, but based on the preliminary cumulative surplus calculation, the Board will not need to vote further distribution for FY'19 as Valley is approximately at 23% of the surplus rule (unaudited). If no further distribution is made to the member districts in FY'19 they would have received a total of \$500,000 voted on earlier in the year. Furthermore, a contributing factor to expenses being up 4% over the original FY'19 budget (while revenues were up 4%) was due to increases in salaries and benefits to support the higher revenue numbers. The distribution amount this year was also decreased due to the payment of \$400,000 for improvements at our Tyngsborough location.
- Revenue for our adult program was at the highest ever totaling almost \$2.8 million. This increase in revenue created a surplus of approximately \$336,000 before admin allocation.

Required Action:

None

Attachments:

FY'19 Interim Statement of Net Assets for the period ending June 30, 2019, Interim Statement of Revenues, Expenses and Changes in Net Assets for the period ending June 30, 2019, Interim Cumulative Surplus Calculation as of June 30, 2019.

Treasurer's Report and PARS OPEB Trust Program Summary



Central Administration Office

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris Scott, Executive Director
James George, CPA, CVA, JD
Date: September 19, 2019
Re: Financial Update Memo - FY'19

Attached please find the FY'19 financial reports.

Required Action:

None

Attachments:

FY'19 Interim Statement of Net Assets for the period ending June 30, 2019, Interim Statement of Revenues, Expenses and Changes in Net Assets for the period ending June 30, 2019, Interim Cumulative Surplus Calculation as of June 30, 2019.

Treasurer's Report and PARS OPEB Trust Program Summary

Valley Collaborative
Interim Statement of Revenues, Expenses and Changes in Net Assets
For the Period Ending June 30, 2019
210 of 210 (100%) School Days

UNAUDITED			
	<u>BUDGET</u>	<u>ACTUAL</u>	
REVENUES			
Services	\$ 16,416,426	\$ 16,567,747	
State Contracts	2,395,000	2,873,062	
Other	506,000	563,866	
Interest	20,000	60,945	
Total Revenues	19,337,426	20,065,620	103.77%
EXPENSES			
Salaries	12,851,042	13,409,187	
Employee Benefits	2,290,000	2,412,765	
Operating Expenses	2,103,975	2,273,676	
Leases & Rentals	448,950	427,710	
Depreciation	738,200	715,782	
Total Expenses	18,432,167	19,239,120	104.38%
Change in Net Assets - Operating	\$ 905,259	\$ 826,500	
Non Operating Activities			
Return to Member Districts	-	-	
Non-Operating Expenses (1)	(425,000)	-	
Change in Net Assets	\$ 480,259	\$ 826,500	

Substantially all disclosures and the Statement of Cash Flows required by GAAP are omitted. No assurance is provided on these financial statements.

Valley Collaborative
Interim Statement of Net Assets
For the Period Ended June 30, 2019

UNAUDITED	
ASSETS	
Current Assets	
Cash and Cash Equivalents	\$ 5,939,546
Restricted Investments - OPEB	4,039,225
Accounts Receivable, Net	1,136,310
Prepaid Expenses and Other Assets	25,901
Cash Held for Member Districts	1,069
Total Current Assets	<u>11,142,051</u>
Non-Current Assets	
Land & Building	6,002,401
Furniture, Equipment, and Leasehold Improvements,	
Net of Depreciation	1,414,637
Construction in Progress	-
Total Non-Current Assets	<u>7,417,038</u>
TOTAL ASSETS	<u><u>\$ 18,559,089</u></u>
LIABILITIES AND NET ASSETS	
Current Liabilities	
Accounts Payable and Accrued Liabilities	\$ 653,701
Other Liabilities	518,610
Member District Accounts (Settlement)	1,069
Total Current Liabilities	<u>1,173,380</u>
Total Liabilities	<u>1,173,380</u>
Net Assets	
Operating - Unrestricted	4,673,966
Restricted - Student Activities	17,455
Reserved - OPEB Trust	3,547,549
Reserved - Capital	1,729,701
Invested in Capital Assets, Net of Related Debt	7,417,038
Total Net Assets	<u>17,385,709</u>
TOTAL LIABILITIES AND NET ASSETS	<u><u>\$ 18,559,089</u></u>
	-

Substantially all disclosures and the Statement of Cash Flows required by GAAP are omitted.
No assurance is provided on these financial statements.

Valley Collaborative**Cummulative Surplus Calculation - FY 19****As of June 30, 2019**

(A)	Voted Cumulative Surplus as of June 30, 2018	4,042,161
(B)	Amount of (A) used to support the FY 19 Budget	-
	Amount of (A) returned to member districts	(500,000)
(c)	Unexpended FY 19 General Funds	861,508
(D)	Cummulative Surplus as of 6/30/19	4,403,669
(E)	FY 19 Total General Fund Expenditures	19,204,112
(F)	Cumulative Surplus Percentage	23%
	Estimated Amount of Excess Cumulative Surplus as of June 30, 2019	<u><u>(397,359)</u></u>

Income Statement By Program

June 30, 2019
210 of 210 Days

	100	200	400	410	712	660	450	665	500	101 MRC	102 MRC	
	Central Admin	HS Site 3	HS Site 2	HS Site 1	Middle School	Elementary	Therapy	Home Services	Adult Services	Education & Training	Supportive Work	Total
REVENUES												
Services	-	5,349,538	1,646,665	1,679,729	2,538,336	5,341,225	12,254	-	-	-	-	16,567,747
State Contracts	-	-	-	-	-	-	-	-	2,413,324	343,336	116,401	2,873,061
Other	6,375	106,252	-	12,132	-	4,162	3,542	48,276	382,827	300	-	563,866
Interest	60,945	-	-	-	-	-	-	-	-	-	-	60,945
Total Revenues	67,320	5,455,790	1,646,665	1,691,861	2,538,336	5,345,387	15,796	48,276	2,796,151	343,636	116,401	20,065,619
EXPENSES												
Salaries	865,373	3,414,765	1,107,609	910,421	1,688,939	3,257,070	18,013	2,020	1,866,408	154,785	123,784	13,409,187
Employee Benefits	742,605	456,717	107,594	45,955	123,685	348,251	268,303	659	318,640	135	221	2,412,765
Operating Expenses	666,094	468,813	135,584	118,466	261,846	389,461	9,742	818	196,292	22,493	4,067	2,273,676
Leases & Rentals	26,338	-	1,575	13,169	-	255,950	-	-	105,241	20,773	4,663	427,709
Depreciation	92,380	241,177	67,513	83,224	57,860	64,141	6,130	599	97,439	5,040	279	715,782
Total Expenses	2,392,790	4,581,472	1,419,875	1,171,235	2,132,330	4,314,873	302,188	4,096	2,584,020	203,226	133,014	19,239,119
Net Income Before Admin Allocation	(2,325,470)	874,318	226,790	520,626	406,006	1,030,514	(286,392)	44,180	212,131	140,410	(16,613)	826,500
Admin Allocation	(2,325,470)	620,937	192,439	158,740	288,999	584,804	40,956	555	387,603	30,484	19,952	0
Operating Net Income	-	253,381	34,351	361,886	117,007	445,710	(327,348)	43,625	(175,472)	109,926	(36,565)	826,500

**VALLEY COLLABORATIVE
TREASURER'S REPORT
MAY 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	\$ 1,011,536.98	\$ 3,120,376.12		\$ (136,510.57)		\$ (1,293,000.00)	\$ 2,702,402.53
Payroll	a/c 795823	\$ 534,562.94		\$ (1,588,396.87)			\$ 1,300,000.00	\$ 246,166.07
Joe's Bistro	a/c 531401	\$ 2,780.98	\$ 9,028.00		\$ (749.46)		\$ (7,000.00)	\$ 4,059.52
ICS MMDA	a/c 856490	\$ 54,903.82				\$ 9.32		\$ 54,913.14
Independence Project	a/c 821315	\$ 4,614.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,614.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 1,608,399.08</u>	<u>\$ 3,129,404.12</u>	<u>\$ (1,588,396.87)</u>	<u>\$ (137,260.03)</u>	<u>\$ 9.32</u>	<u>\$ -</u>	<u>\$ 3,012,155.62</u>
 MMDT	a/c 0044263747	<u>\$ 2,462,186.95</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 5,387.13</u>	<u>\$ -</u>	<u>\$ 2,467,574.08</u>
 Total Unrestricted Cash		<u>\$ 4,070,586.03</u>	<u>\$ 3,129,404.12</u>	<u>\$ (1,588,396.87)</u>	<u>\$ (137,260.03)</u>	<u>\$ 5,396.45</u>	<u>\$ -</u>	<u>\$ 5,479,729.70</u>
 PARS OPEB Trust		<u>\$ 3,993,223.68</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (831.92)</u>	<u>\$ (109,203.55)</u>	<u>\$ -</u>	<u>\$ 3,883,188.21</u>
 TOTAL CASH		<u>\$ 8,063,809.71</u>	<u>\$ 3,129,404.12</u>	<u>\$ (1,588,396.87)</u>	<u>\$ (138,091.95)</u>	<u>\$ (103,807.10)</u>	<u>\$ -</u>	<u>\$ 9,362,917.91</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JUNE 30, 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	\$ 2,702,402.53	\$ 2,053,759.16		\$ (157,720.92)		\$ (1,500,000.00)	\$ 3,098,440.77
Payroll	a/c 795823	\$ 246,166.07		\$ (1,462,358.58)			\$ 1,500,000.00	\$ 283,807.49
Joe's Bistro	a/c 531401	\$ 4,059.52	\$ 6,250.00		\$ (542.59)			\$ 9,766.93
ICS MMDA	a/c 856490	\$ 54,913.14				\$ 9.02		\$ 54,922.16
Independence Project	a/c 821315	\$ 4,614.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,614.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 3,012,155.62</u>	<u>\$ 2,060,009.16</u>	<u>\$ (1,462,358.58)</u>	<u>\$ (158,263.51)</u>	<u>\$ 9.02</u>	<u>\$ -</u>	<u>\$ 3,451,551.71</u>
 MMDT	a/c 0044263747	<u>\$ 2,467,574.08</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 5,171.44</u>	<u>\$ -</u>	<u>\$ 2,472,745.52</u>
 Total Unrestricted Cash		<u>\$ 5,479,729.70</u>	<u>\$ 2,060,009.16</u>	<u>\$ (1,462,358.58)</u>	<u>\$ (158,263.51)</u>	<u>\$ 5,180.46</u>	<u>\$ -</u>	<u>\$ 5,924,297.23</u>
 PARS OPEB Trust		<u>\$ 3,883,188.21</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (809.00)</u>	<u>\$ 156,845.52</u>	<u>\$ -</u>	<u>\$ 4,039,224.73</u>
 TOTAL CASH		<u>\$ 9,362,917.91</u>	<u>\$ 2,060,009.16</u>	<u>\$ (1,462,358.58)</u>	<u>\$ (159,072.51)</u>	<u>\$ 162,025.98</u>	<u>\$ -</u>	<u>\$ 9,963,521.96</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JULY 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	\$ 3,098,440.77	\$ 944,921.40		\$ (752,665.92)		\$ (1,100,000.00)	\$ 2,190,696.25
Payroll	a/c 795823	\$ 283,807.49		\$ (983,801.30)			\$ 1,100,000.00	\$ 400,006.19
Joe's Bistro	a/c 531401	\$ 9,766.93	\$ 7,785.00		\$ (690.49)			\$ 16,861.44
ICS MMDA	a/c 856490	\$ 54,922.16				\$ 9.32		\$ 54,931.48
Independence Project	a/c 821315	\$ 4,614.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,614.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 3,451,551.71</u>	<u>\$ 952,706.40</u>	<u>\$ (983,801.30)</u>	<u>\$ (753,356.41)</u>	<u>\$ 9.32</u>	<u>\$ -</u>	<u>\$ 2,667,109.72</u>
 MMDT	a/c 0044263747	<u>\$ 2,472,745.52</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 5,272.98</u>	<u>\$ -</u>	<u>\$ 2,478,018.50</u>
 Total Unrestricted Cash		<u>\$ 5,924,297.23</u>	<u>\$ 952,706.40</u>	<u>\$ (983,801.30)</u>	<u>\$ (753,356.41)</u>	<u>\$ 5,282.30</u>	<u>\$ -</u>	<u>\$ 5,145,128.22</u>
 PARS OPEB Trust		<u>\$ 4,039,224.73</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (841.51)</u>	<u>\$ 17,433.75</u>	<u>\$ -</u>	<u>\$ 4,055,816.97</u>
 TOTAL CASH		<u>\$ 9,963,521.96</u>	<u>\$ 952,706.40</u>	<u>\$ (983,801.30)</u>	<u>\$ (754,197.92)</u>	<u>\$ 22,716.05</u>	<u>\$ -</u>	<u>\$ 9,200,945.19</u>

Distribution of Surplus Funds for FY2019

Distribution of Surplus Funds for FY2019					
				Percentage	
Member District	Summer Tuition	School Year Tuition	Total Fiscal Year Tuition	of Total	Return
Billerica Public Schools	87,054	876,900	963,953	13.48%	67,414.51
Chelmsford Public Schools	261,231	1,618,616	1,879,848	26.29%	131,468.01
Dracut Public Schools	116,658	835,387	952,045	13.32%	66,581.68
Groton-Dunstable Regional School District	16,860	140,119	156,979	2.20%	10,978.40
Nashoba Valley Technical High School	10,740	33,916	44,656	0.62%	3,123.02
North Middlesex Regional School District	99,070	667,296	766,366	10.72%	53,596.16
Tewksbury Public Schools	141,347	877,868	1,019,214	14.26%	71,279.23
Tyngsborough Public Schools	47,873	418,006	465,879	6.52%	32,581.44
Westford Public Schools	107,618	792,892	900,510	12.60%	62,977.55
Grand Total	888,449	6,261,000	7,149,449	100.00%	500,000.00



VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
8/1/2019 to 8/31/2019

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

Account Summary

Source	Beginning Balance as of 8/1/2019	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 8/31/2019
OPEB	\$4,055,816.97	\$0.00	\$6,627.57	\$844.96	\$0.00	\$0.00	\$4,061,599.58
Totals	\$4,055,816.97	\$0.00	\$6,627.57	\$844.96	\$0.00	\$0.00	\$4,061,599.58

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
			3-Years	5-Years	10-Years	
0.16%	4.59%	6.25%	7.85%	-	-	6/24/2015

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 A. Scott, Executive Director
Date: September 19, 2019
Re: Valley Organizational Chart

As you are aware in FY'19 Valley's Finance and Operations, Technology and Adult Services Departments were significantly reorganized.

The FY'20 Organizational Chart captures the work that has gone into setting up Valley's departments to run efficiently and effectively.

Required Action:

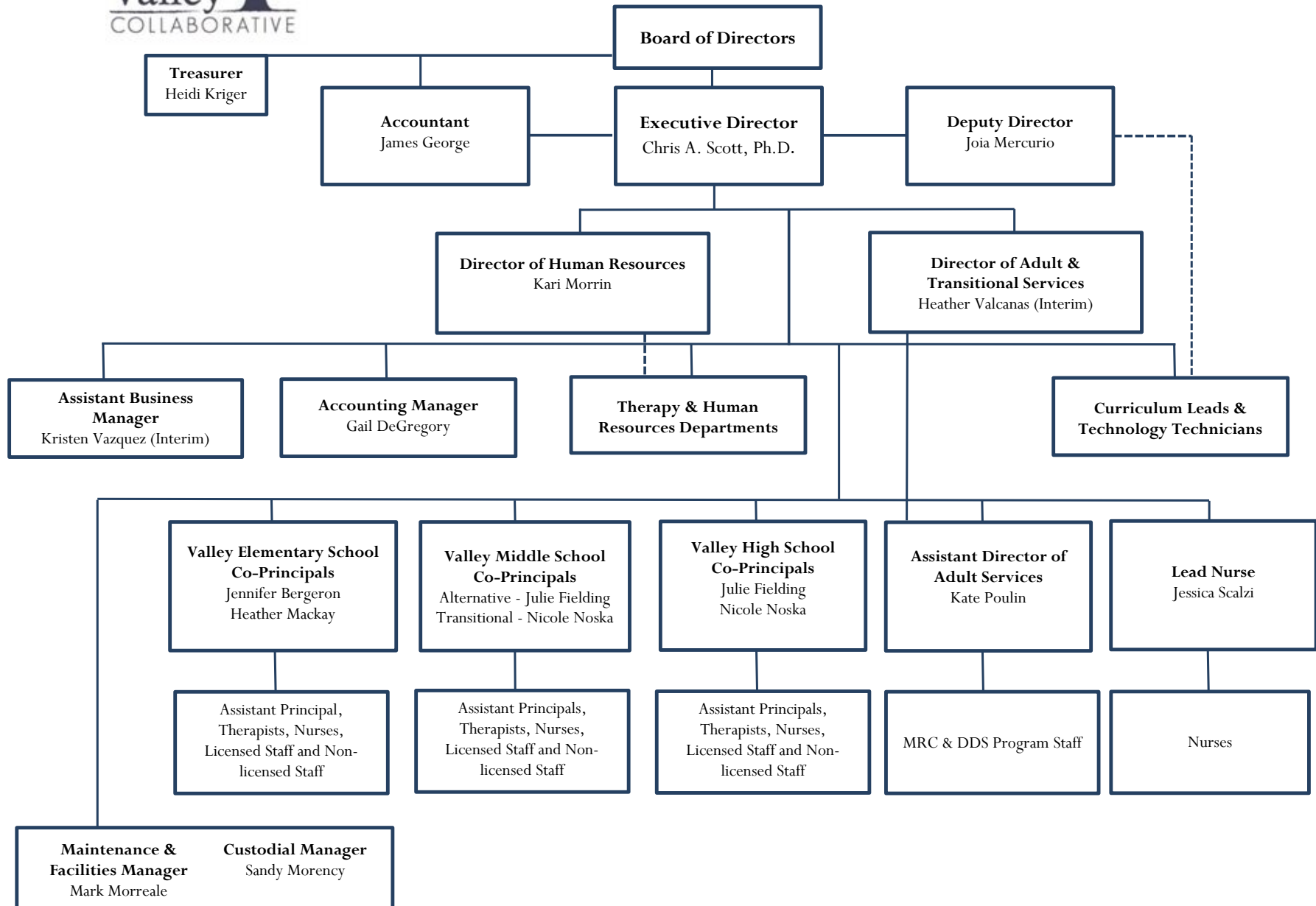
Vote

Attachments:

Valley Organizational Chart



FY'20 Organizational Chart





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
Heather Valcanas, Director of Adult & Transitional Services (Interim)
Date: September 19, 2019
Re: Adult Services Policy Manual

Attached is the updated Adult Services Policy Manual.

Required Action:

None

Attachments:

Adult Services Policy Manual

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



Today and Tomorrow Program Handbook & Policies and Procedures Manual

Valley Collaborative
25 Linnell Circle, Billerica, MA 01821
Tel: (978) 528-7826; Fax (978) 663-0759
www.valleycollaborative.org

Updated and Approved by the Board of Directors of Valley Collaborative on

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INTRODUCTION

Purpose of the Today and Tomorrow Program Handbook & Policies and Procedures Manual

Welcome! This Valley Collaborative Today and Tomorrow Program (the Program) Handbook is intended to serve as a guide to help individuals and their families learn about policies and rules of the Collaborative as well as to set forth basic rights, responsibilities, and expectations of individuals.

Please understand that no set of rules or guidelines can cover every conceivable situation that may arise at the Program or the Collaborative. The rules, policies and procedures set forth in this handbook are intended to apply under normal circumstances. However, from time to time, there may be situations that require immediate or nonstandard responses. This handbook does not limit the authority of the Collaborative to deviate from the rules and procedures set forth in this handbook. The Collaborative reserves the authority to deal with individual circumstances as they arise in the manner it deems most appropriate taking into consideration the best interests of the Collaborative, its faculty, employees, individuals, and the community.

Please take the time to familiarize yourself with the contents of this handbook. The Collaborative is hopeful that the handbook will answer many questions you may have about the Collaborative, its programs, rules, and policies. **Guardians and individuals are instructed to sign and return Individual/Guardian Acknowledgement of Receipt of the Today and Tomorrow Program Handbook & Policies and Procedures Manual (Appendix J) and return it to the Assistant Director of Adult Services.**

Please feel free to contact the Director of Adult Services should you have any questions concerning this handbook.

About the Collaborative

Valley Collaborative is operated by the following school districts Billerica, Chelmsford, Dracut, Groton-Dunstable Regional, Nashoba Valley Technical Program District, North Middlesex Regional, Tewksbury, Tyngsborough, and Westford.

The Collaborative is a Massachusetts Department of Elementary and Secondary Education (DESE) approved public school entity and a contracted provider of services for the Executive Office of Health and Human Services (EOHHS) that provides high quality academic, transitional, vocational, and community inclusion services.

The Collaborative Today and Tomorrow programs offer opportunities for individuals to work in the community with supports funded through the Department of Developmental Services (DDS), the Massachusetts Rehabilitation Commission (MRC), and the Massachusetts Commission for the Blind (MCB).

¹For the purposes of this Handbook, the word “individual” shall mean the Today and Tomorrow Program participant referred to Valley Collaborative Adult Services Department by a Health and Human Services Agency.

Mission Statement

Valley Collaborative's Adult Services Department's Mission is to support our community of adults in realizing maximum independence and continual growth by providing diverse vocational opportunities and rewarding experiences aligned with each individuals' strengths and interests.

Vision Statement

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

2019 - 2020 PROGRAM YEAR**List of Holidays or Closings**

July 4, 2019	Fourth of July
September 2, 2019	Labor Day
September 3, 2019	Professional Development Day
October 14, 2019	Columbus Day
November 11, 2019	Veterans Day
November 27, 2019	Professional Development Day
November 28- 29, 2019	Thanksgiving Recess
December 23, 2019 -January 1, 2020	Winter Recess
January 20, 2020	Martin Luther King Day
February 17, 2020	Presidents Day
April 10, 2020	Good Friday
April 20, 2020	Patriots' Day
May 25, 2020	Memorial Day

GENERAL PROGRAM POLICIES AND PROCEDURES

Program Closing Announcements

On occasion, the Collaborative may need to close programming because of bad weather or an emergency situation. Announcements for program cancellations, delayed openings, and early releases will be made on: AM radio - WBZ (1030); local television channels; the Collaborative website: www.valleycollaborative.org.

In the event of inclement weather or an emergency, the Today and Tomorrow Program will be closed at all of the following locations.

- 40 Linnell Circle, Billerica, MA
- 25 Linnell Circle, Billerica, MA
- 17 Bridge St. #102, Billerica, MA

Early Release

In case of inclement weather or an emergency that develops in the middle of the day, the Executive Director may make the decision to release individuals early in the sake of safety.

NOTE: Individuals/Guardians should make sure that a current emergency form with proper emergency contact information, including the contact information of alternative caretakers is on file with the Program Nurse.

Observation Policy

The goal of this observation policy is to allow a guardian, consultant to the program, or evaluator to observe an individual or program in order to gain the information the observer is seeking with as little disruption as possible to the individuals, staff, and program.

Program Visitor Procedures

While the Today and Tomorrow Program encourages the involvement of guardians and community members in the services provided to individuals, the Program has a duty to protect the safety and confidentiality of its individuals, as well as to ensure that their program services are not disrupted. As a result, certain rules and procedures must be followed to ensure that visits are beneficial to the visitors and not harmful to the individuals.

All visitors to the Program must report to the Program Coordinator/Program Nurse immediately upon entering the building. All visitors must sign in, noting the time of their arrival and identifying the purpose of their visit. The Program Coordinator/Program Nurse will designate a staff member to escort visitors to their appropriate destination.

All visitors must sign out, noting the time of their departure. Visitors may not proceed to any areas of the building other than the designated locations of their meetings, visits, or observations.

Release of Individual Other than Guardian

The Today and Tomorrow Program will not allow anyone other than the individual/guardian to dismiss from the Program without prior notification. If a guardian wants a relative, friend, or care provider to pick up an individual from the program, the guardian must give permission to the Assistant Director of Adult Services and/or Program Nurse. If a guardian calls, the Program must verify that it was the guardian making the call. The individual must be signed out by the guardian/relative/provider before the program will release the individual.

Attendance Policy

Regular attendance is vital in order for program services to be delivered in a meaningful and consistent manner. The Today and Tomorrow Program requires individuals maintain an attendance rate of at least 90% throughout the program year. This translates into a maximum of 24 annual absences, albeit for vacation, illness, or personal reasons.

Attendance dropping below 90%; that is not the result of hospitalization, may result in removal from the Program.

As per our health policy, any absences due to illness lasting three (3) or more consecutive days require a doctor's note before returning to the Program.

Whole Program or Community Emergencies

There may be instances where there is a disaster or community emergency. In such instances, the Program will work to reunite guardians/group home managers/parents with individuals if the Program is in containment or needs to be evacuated. Occasionally, there may also be a need to increase the level of security because of a possible disturbance in the community. When this happens, visitors may not be allowed into the Today & Tomorrow Program, and individuals and staff may not be allowed to leave until local authorities have deemed it safe to do so.

Emergency Evacuation Safety Plan

The Today & Tomorrow Program will develop and ensure that staff are familiar with emergency procedures, including the emergency evacuation safety plan for their building. During an evacuation, the priority is to get all individuals out of the building in an orderly, prompt, and safe manner. Arrangements will be made in advance with the Program Coordinator (or designee) to provide additional assistance for the evacuation of any individual requiring such assistance.

The Today & Tomorrow Program Emergency Evacuation Safety Plan includes the following procedures:

- Every two years the plan is reviewed in the location that affects safe evacuation;
- When existing evacuation plans are no longer effective or changes are proposed, the plan is updated and sent to DDS Area Director(s);
- A minimum of 2 evacuation drills are conducted by the program annually;
- Initial training, including a walk-through of the setting, identification of sprinkler and fire extinguisher locations, and location of emergency number postings;
- Embedded program strategies to help all individuals understand the nature of the drills;
- Special provisions for the evacuation of any mobility-impaired individual;
- Identification of the location of emergency information for individuals to be taken during an evacuation;
- A written log of each evacuation drill report sheets that includes date, time elapsed, participants (individuals and staff), witnesses, etc.

Written Notification and Communication

The Today and Tomorrow staff welcomes and encourages communication between program and home.

The Assistant Director of Adult Services or his/her designee has the responsibility of notification and communication with individuals, families, state agencies, and stakeholders. Such designees include the Program Coordinators and Program Nurse. The following is a guideline for delegation of collaboration and communication:

Program Nurse: Submission of ISP reports; scheduling meetings; distribution of attendance records; medical emergency, injury or hospitalization; Today and Tomorrow Program related issues; behavior implementation plans/functional behavioral assessments; filing of an incident or DPPC report.

Program Coordinators: Distribution of reports; scheduling meetings; distribution of attendance records; ISP implementation, development, updates; and progress reports.

Assistant Director: Today and Tomorrow Program related updates; behavior implementation plans/functional and safety assessments; filing of an incident or DPPC report.

Director of Adult Services/Executive Director: Medical Emergency, injury or hospitalization and death of an individual.

Individual Records

115 CMR 4.00 governs the creation, maintenance and destruction of, and access to, records relating to services and supports provided, purchased, or arranged for the individuals by the Department of Developmental Disabilities and shall apply to all programs and services or supports which are operated, licensed, certified, or contracted by the Department.

Valley Collaborative maintains legal and program services binders for all individuals in the Today and Tomorrow Program. Please see Appendices A and B.

Per 115 CMR 4.03 and 4.04 individual records will consist of the following:

- Identifying Information including but not limited to individual's full name, Social Security number, religious preference (if disclosed voluntarily), language, health and insurance information, identification of family and/or guardians including addresses and phone number(s), legal competency status including guardianship documents, a list of providers current and from previous 2 years, and employment history.
- Emergency Information including but not limited to a photograph taken within 5 years after age 18 and/or marked change in individual's appearance, name (including nicknames), age, general physical characteristics, contact information of legal guardian,

emergency contact information, health insurance information, relevant abilities and behavior characteristics, list of allergies and medications, pattern of movement (if lost previously), likely response to search efforts, places frequented, physician(s) information, contact information for service coordinator and other providers if applicable.

- Current assessment reports
- ISP
- Medical Information including recent physical and dental exams, special diet, record of medical protocols including occurrence log, and list of health conditions requiring ongoing management
- Incident Reports
- Behavior Modification Plans
- Referral/Transfer Information
- Record Access Log
- Progress Notes
- Medication Information
- Human Rights Trainings

Access to Individual Records

The following program personnel are authorized to access individual records:

- Program administrators
- Direct service personnel
- Administrative office staff
- Clerical personnel
- Evaluation team which evaluates an individual

Authorized program personnel are permitted access to the individual records of the individuals to whom they are providing services in order to perform their official duties. The consent of the eligible individual or the guardian is not necessary.

A log of access is to be kept as part of each individual's record. If parts of the individual record are separately located, a separate log will be kept with each part. The log is to indicate all persons who have obtained access to the individual record stating:

- The name, position and signature of the person releasing the information
- The name, position and, if a third party, the affiliation if any, of the person who is to receive the information
- The date of access
- The parts of the record to which the access was obtained
- Purpose of access

4.06: Access to Records and Record Privacy(1) Access or Inspection by the Individual, Guardian, or Representative.

(a) The individual, guardian, designated representative, or other legally authorized representative shall be permitted to inspect and copy the individual's records upon request. Legally authorized representatives shall be permitted to inspect and copy on request only those records relevant to those matters within their authority.

(b) When necessary for the understanding of the individual, guardian, or representative, the staff shall read or interpret the record.

(2) Inspection by Other Persons. Records of an individual shall be private and not open to inspection by third parties, other than those in 115 CMR 4.06(1)), except as provided in 115 CMR 4.06(2).

(a) Records shall be open to inspection by a third party upon informed consent by the individual or guardian:

— Before consent is obtained, the individual or guardian shall be afforded an opportunity to examine the records to be released, and shall be provided with the name of the recipient, possible uses of the information, and possible risks and benefits of, and alternatives to disclosure.

— A record of such authorization shall be included in the individual's record.

(b) Records of an individual shall be open to inspection upon proper judicial order. For the purpose of 115 CMR 4.06(2) (b), the term "proper judicial order" shall mean an order signed by a justice or special justice of a court of competent jurisdiction.

(c) The head of the provider or a designee shall provide access to an individual's record by:

— Provider staff, as necessary and appropriate, including the human rights officer and associated professional consultants providing habilitation services and supports to the individual;

— Persons authorized by the Department to monitor the quality of services and supports offered to the individual, including the human rights committee;

— Persons approved by the Department and authorized under Department regulations to engage in research;

— Agencies which require specified information as a prerequisite for third party reimbursement of essential service;

— Department investigators appointed to conduct an investigation pursuant to 115 CMR 9.00 or M.G.L. c. 19C;

— Agencies or attorneys who are authorized by statute, by court decision, or by the Department to represent, advocate for, or protect the legal rights of the individual.

— (d) Where the individual is legally competent, but not capable in fact of making a knowing decision concerning the release of records, the head of the provider or a designee may authorize, where necessary and appropriate, inspection of records by persons likely to further the habilitation of the individual, including:

— Staff of providers proposed to provide habilitation services to the individual in the near future;

— Insurers, trustees, and other persons through whom financial or legal assistance is or may be available.

(e) The head of the provider or a designee may make records available, as necessary and appropriate, to a physician who requests such records in the treatment of a medical emergency; provided, however, that the individual and any guardian are given notice of the access as soon as possible.

(f) The provisions of 115 CMR 4.06(2) (a) through (e) notwithstanding, the Commissioner or the Commissioner's written designee may authorize access to individual records when deemed in the best interest of an individual or individuals served by the Department.

(g) The Commissioner may authorize access to individual records by attorneys representing the Department when necessary to the defense of specific legal claims brought by, concerning, or on behalf of the individual against the Commonwealth, the Department, or its agents or employees.

(3) Restrictions on Scope of Access. Where the head of the provider or a designee authorizes release of the records, every precaution shall be taken to protect the confidentiality of the individual.

(a) The head of the provider or a designee shall, wherever possible, set reasonable restrictions on access to a person's records by ascertaining from the area office director the persons who may inspect the record and the permitted uses to be made of the record, specifying the duration of time that the record may be held, and setting any other restrictions that will serve to protect the confidentiality of the record.

(b) Only those records which are necessary to meet the legitimate purposes of the requesting person(s) shall be released, and, whenever possible, the name or personal identifying information of the individual shall be withheld.

(c) A listing shall be kept of every person or organization, other than those identified in 115 CMR 4.06(1) and 4.06(2)(c)1., given access to the individual's records, the uses to be made of that information, a brief description of the information which has been released, and the person authorizing access. A list of such accesses shall be made available to the individual, guardian, designated representative, legally authorized representative, and the human rights committee, upon request.

(d) The individual, guardian, designated representative, or legally authorized representative of the individual may challenge a decision to permit access to a record by filing a complaint with the head of the provider in accordance with the Department's regulations on investigations, 115 CMR 9.00. The provider shall promptly send a copy of this complaint to the human rights committee. Once a complaint is filed to challenge access to a record, no records which are the subject of the complaint shall be further disclosed to the person(s) or organization(s) involved until the complaint is resolved.

(e) An individual or guardian shall be informed of a subpoena or court order commanding production of an individual's records in a court or agency proceeding, and of the individual's right to request the court to quash or modify the subpoena or order on the grounds that it is unreasonable or oppressive, or on any other grounds permitted by law.

(4) Accuracy of Information. The record maintained by the provider and area office shall contain accurate, complete, timely, and relevant information, consistent with the requirements of 115 CMR.

(a) If an individual or guardian believes that the record contains inaccurate or misleading information, or objects to the collection of information or its use, he or she may file a complaint with the head of the provider. If the individual or guardian seeks to challenge the decision made at this level, or if the complaint concerns information contained in the records at the office of the case management team, a complaint may be filed with the Department. A copy of this complaint shall be sent promptly to the human rights committee.

(b) If an individual or guardian believes that the record contains inaccurate or misleading information, he or she may prepare a statement of disagreement, with assistance if requested, which shall be entered into the record.

(5) Disclosure of Existence of Record. The provider shall inform an individual, guardian, or designated or legal representative, upon request, whether the individual is the subject of a record system maintained by the provider.

Privacy and Security of Individual Records

In accordance with federal and state requirements, the Collaborative protects the confidentiality of any personally identifiable information that it collects uses or maintains. The Collaborative maintains and provides access to individual records in accordance with federal and state requirements.

Records for Individuals No Longer Enrolled

The Program Coordinators will keep the individual records for a minimum of three (3) years from the individual's exit date from the program.

The Assistant Director of Adult Services is responsible for the ongoing process of identifying of documents that have met the required retention period and overseeing their destruction.

Per 115 CMR 4.07 (b) and (c) the last three years of the individual's record will be made available to the Department of Developmental Services.

For full and complete regulations please see 115 CMR 4.00: RECORDS Section

Reporting Abuse and Neglect – Disabled Persons Protection Commission

As mandated reporters, Collaborative employees are required to file a complaint per 115 CMR 9.00 guidelines when there is believed to be a non-frivolous allegation of mistreatment, an illegal, dangerous, or inhumane condition or incident, or a medicolegal death of an individual. It is also mandated to file a report with DPPC under M.G.L 19C if there is reason to believe serious harm either physical or emotional has been inflicted to an individual.

Immediate Notification

In the event of a serious or unusual incident occurs, the Collaborative's Executive Director is notified immediately. Upon notification, the Executive Director directs the gathering of all available pertinent information from involved parties. The Executive Director and/or Director of Adult Services meets with involved parties as necessary. The Collaborative Incident Report Form is to be completed by staff and included in the individual record. The incident report form documents the incident, precipitating events prior to the incident, and follow up needed. The report form also documents notification to all parties of the incident. Serious incidents are those that result in injury, safety concerns, substantial discipline code violations, or emergency personnel responses. The Executive Director and/or the Director of Adult Services will notify the appropriate state agencies.

- Death of an individual
- Filing of a DPPC report or a complaint to the Disabled Persons Protection Commission against the Program or a program staff member for abuse or neglect of an individual
- Any action taken by a federal, state or local agency that might jeopardize the Program's approval with the Department
- Any legal proceeding brought against the Program or its employee(s) arising out of circumstances related to the care or education of any of its individuals regardless of state of residency
- Unexpected hospital visit
- Motor vehicle accident during transport by program staff
- Individual run away/leaving program property without notifying/permission
- Significant behavioral incident
- Fire
- Theft
- Criminal activity
- Victim of physical altercation
- Property damage
- Suicide attempt
- Emergency termination of an individual under circumstances in which the individual presents a clear and present threat to the health and safety of him/herself or others
- Medical/psychiatric intervention not requiring a hospital visit

Guardian Consent and Notification

The Program collects consents for a variety of activities and protocols, including emergency medical treatment, medication administration, community outings, program events, photographs and publicity.

Once a newly referred individual is accepted for participation in the Program, the start date is not finalized until all consents and medical forms are returned by the individuals/guardians.

Per fiscal year, a packet of consent forms which are included in the Appendix will need to be returned to the Program Nurse. If the consents have not been received within 30 days, the Program Nurse will notify the individual/guardian and participation may be interrupted until completed consent forms are returned.

Change of Legal Status

If staff is notified of a change of legal status, the Director of Adult Services will:

- Request a copy of official court documents.
- Enter official court documents into the Individual Record, including restraining orders or other legal judgments.
- Notify the appropriate staff involved in the care and education of the individual.
- In the event that a non-custodial individual attempts to violate a court order and attempts access to an individual, the Director of Adult Services is to be notified immediately.

Complaints and Grievances

In the event differences of opinion or conflicts arise between Valley Collaborative and the individuals and families we support a formal conflict resolution model specific to individuals being served will be established:

Step 1

- Attempted resolution through communication between the individual/guardian with the Associate Director of Adult Services. Area Office Staff will be notified and included if they so choose.
- A summary of meeting and outcome will be made available to all participants. If resolution is agreed upon it will be included in said summary.

Step 2

- If conflict is not resolved at Step 1 the individual/guardian can escalate the issue to the Director of Adult Services. Area Office Staff will be notified and included if they so choose.
- The Director of Adult Services can enter into mediation with the individual/guardian.
- A summary of meeting and outcome will be made available to all participants. If resolution is agreed upon it will be included in said summary.

Step 3

- If conflict is not resolved at Step 2 either the individual/guardian and/or the Director of Adult Services can escalate the matter to the Valley Collaborative Executive Director and Senior Level Area Office Staff would be notified and included in the attempt at resolution.
- A summary of meeting and outcome will be made available to all participants. If resolution is agreed upon it will be included in said summary.

Valley Collaborative recognizes that from time to time an individual/guardian may choose to work with another provider and supports their choice to do so. If at any time an individual seeks to leave the Collaborative family, Valley is committed to a smooth transition and uninterrupted services for that individual. Valley will work closely with the individual and the local area office to make the changes as stress free and seamless as possible for all those involved.

Program Oversight-DDS

The Collaborative is responsible to ensure that the individual's ISP is being appropriately implemented and that the service delivery is aimed at assisting the individual to meet the goals identified within the individual's ISP, and welcomes site visits for program monitoring. Program visits by external support staff, are documented in each individuals' access log. Any person either internal, or external requesting access to an individual's binder, must provide the proper documentation prior to access. The Collaborative ensures that instructional groupings do not exceed the applicable guidelines per 115 CMR of individual staff ratio and intensity level.

Individual Referral and Admissions

Prior to individual placement in a Collaborative program, DDS will forward a comprehensive referral packet to the Program in which the individual's enrollment is to be considered. Upon receipt, the Assistant Director of Adult Services or his/her designee will work with the Service Coordinator to schedule a site visit and intake meeting with the guardians, at which time detailed information about the Program will be discussed. Such information will include: the Collaborative's services and policies.

The Assistant Director of Adult Services or his/her designee will also conduct a tour of the program in which the individual would be placed. Prior to enrollment, an Admissions Packet will need to be filled out by the individual/guardian. Please see Appendix C.

Placement Meeting

Upon acceptance to a Collaborative program, the Service Coordinator may schedule a Team meeting. Team participants will include: the individual, guardian(s), Service Coordinator, Assistant Director of Adult Services or his/her designee, external support staff working with the individual, designee of any district/agency cost sharing the placement (if applicable), and any other persons determined appropriate by members of the Team.

Service Agreements

It is the responsibility of the state agency to enter into service agreements with the Collaborative program in which an individual is being placed. In each service agreement, the Collaborative will provide the following assurances:

Assurances on the part of the Collaborative that the Program will comply with all elements of the ISP (Individual Service Plan) for the individual and shall provide, in writing, to state agency detailed documentation of such compliance through completion of required individual progress reports.

1. The Today and Tomorrow Program shall allow state agency to conduct announced and unannounced site visits and to review all documents and program.
2. The Today and Tomorrow Program shall afford all applicable legal requirements of the regulations and applicable policy statements and directives issued by both federal and state health and human service agencies.
3. The Today and Tomorrow Program assures the state agencies that it does not deny an individual access to its programs or services on the grounds of race, color, age, disability, gender, gender identity, religion, national origin, or sexual orientation.

INDIVIDUAL POLICIES: RIGHTS AND RESPONSIBILITIES OF INDIVIDUALS AND GUARDIANS 115 CMR 5.03 and 5.04

Rights of Individuals

It is impossible to list all individuals' rights. The following is a non-exhaustive list of individual rights which shall not be construed to deny or limit other rights retained by individuals, in their capacity as members of a program, or as citizens.

Individuals have the right to:

Receive services and supports provided in a manner that promotes:

- Human Dignity.
- Humane and adequate care and treatment.
- Self-determination and freedom of choice to the individual's fullest capability.
- Opportunity to live and receive services or supports in the least restrictive and most typical setting possible.
- Opportunity to undergo typical developmental experiences, even though such experiences may entail an element of risk; provided however, that the individual's safety and well-being shall not be unreasonably jeopardized.
- Opportunity to engage in activities and styles of living which encourage and maintain the integration of the individual in the community.
- The right to communicate.
- The right to be protected from private and commercial exploitation.
- The right to be visited and to visit other under circumstances that are conducive to friendships.
- The right to enjoy basic goods and services without threat of denial or delay for any purpose by providers.
- The right to reasonable expectation of privacy.
- The right to decline any service or support.
- Physical safety and protection of personal property.
- Safe buildings, sanitary facilities, and available drinkable water. Individuals have the right to use program supplies and facilities and work in a clean, organized environment.
- Receive respect from staff and administrators, which would exclude their being, subjected to cruel and unusual punishments, especially those which are demeaning or derogatory, or which diminish their self-esteem.
- Consult with staff and anyone else connected with their program if they so desire at appropriate times.
- Express their opinions and feelings.

Responsibilities of Individuals

While it is not possible to list all individual responsibilities, individuals who consistently behave in accordance with the following list of broad responsibilities will be in compliance with the rules of the Program.

Individuals have the responsibility to:

- Respect the rights of all persons.
- Respect the diversity of staff and individuals in the Collaborative with regard to race, color, ethnicity, national origin, religion, sex, marriage, pregnancy, guardianship, sexual orientation, gender identity, primary language, handicap, special needs, age, and economic class.
- Contribute to the maintenance of a safe and positive environment.
- Exercise the highest degree of professionalism in observing and adhering to rules and regulations.
- Recognize that responsibility is inherent in the exercise of every right.
- Comply with program service definitions as set forth by DDS.

Individual Code of Conduct

Nondiscrimination, Civil Rights, and Due Process

The Collaborative is committed to maintaining an environment where bigotry and intolerance, including discrimination on the basis of race, color, national origin, sex, sexual orientation, gender, gender identity, religious beliefs, disability, or age have no place; and where any form of coercion or harassment that insults the dignity of others and creates an intimidating, threatening, or abusive environment is unacceptable. The Collaborative will not tolerate discrimination or the infringement of another's civil rights. This policy shall apply to conduct that occurs on Collaborative or program grounds, at program or Collaborative related activities, or traveling to or from program Collaborative related activities.

Prohibited Conduct

Conduct prohibited under this policy includes, but is not limited to:

Bias Motivated Conduct: Any act, including conduct or speech, directed at or which occurs to a person or property because of actual or perceived race, color, national origin, ethnicity, religion, sex, gender identity, sexual orientation, disability, or age.

Discrimination: The unequal treatment of others based on race, color, national origin, ethnicity, religion, sex, sexual orientation, disability, or age.

Harassment: Unwelcome, verbal, written or physical conduct targeting specific person(s), which is sufficiently severe, persistent, or pervasive to create an intimidating, hostile, humiliating, or offensive program environment, or substantially interfere with the progress of an individual's services.

Sexual Harassment: Physical or verbal conduct of a sexual nature, not limited to but including sexual advances, which foster a hostile environment for the victim, sexual assault, and rape.

Hate Crimes: Criminal acts to which recognized types of bias motives are an evident contributing factor. Criminal bias-motivated conduct entails, at a minimum, threats. Criminal conduct includes acts putting someone in fear of immediate physical harm (assaults), and actual physical violence (assault and battery), and grows most serious if a victim suffers any bodily injury. Repeated threatening or menacing actions like following someone can amount to the crime of stalking.

Hostile Environment: Subjecting another individual to threats, intimidation, or coercion that is/are sufficiently severe, persistent, or pervasive so as to interfere with or limit an individual's ability to participate in or benefit from the Collaborative's programs or activities or place the individual in reasonable fear for his or her safety. Whether a program environment has become hostile must be evaluated based on the totality of the circumstances. A hostile environment does not necessarily entail that an individual exhibits quantifiable harm.

Stalking: Intentional conduct involving two or more acts directed at a specific person, which would cause an average person substantial distress, where the perpetrator has made threats causing the targeted person fear of death or injury.

Retaliation: Retaliating in any way against another individual for complaining of conduct prohibited under this policy.

Commitment to Prevention and Investigation

The Collaborative is committed to the prevention and accurate reporting of all incidents of civil rights violations such that all individuals and staff can enjoy a safe, non-threatening educational and working environment. Program administrations will thoroughly investigate all instances of violation and take disciplinary action in accordance with this Handbook, as well as report such instances to law enforcement agencies where appropriate. Collaborative staff must intervene in all civil rights violations and instances of harassment whenever witnessed, reported or suspected. The Assistant Director of Adult Services and the applicable Program Coordinator will be notified immediately whenever civil rights violations are in question, and Collaborative staff will move quickly in preventing a recurrence of any civil rights violation or incident of harassment.

Procedures for Responding to and Investigating Incidents

- All instances of civil rights violations, witnessed or suspected, must be reported to the Program Coordinator and/or Assistant Director of Adult Services.
- Any individual coming forward to report a civil rights violation he or she has experienced will be directed to the Program Coordinator and/or Assistant Director of Adult Services, following any emergency needs being attended to.
- Consideration will be given to whether any immediate or interim steps are necessary to ensure the safety of and avert retaliation of the complainant.
- The investigation must determine whether a civil rights violation has in fact occurred.
- The investigation must include preservation and gathering of evidence from the scene of an incident. For example, bias-related notes will be copied.
- The investigation will include interviewing victims and witnesses as soon as possible, as well as others who may have relevant knowledge.
- The investigation may include other methods and documents deemed relevant and useful.
- All interviews and evidence should be carefully evaluated for the presence of bias indicators that would characterize the matter as a civil rights violation.
- The investigation will conclude with a finding as to whether a civil rights violation has or has not occurred.

Consequences for Civil Rights Violations

Non-disciplinary corrective actions: Some violations can be addressed with steps that do not necessitate disciplinary action. These steps usually lay within the discretion of the Program Coordinator or his/her designee. Such instances may warrant counseling, diversity awareness training, separating offender and victim, guardian conferences, and/or special program assignments.

Disciplinary Action: Disciplinary actions will be taken toward the goal of eliminating the offending conduct, preventing recurrence, and reestablishing a program environment conducive for the victim to learn. Violations of civil rights of individuals or staff may result in sanctions including suspension, emergency termination of enrollment, and expulsion for individuals and suspension, depending on the severity of the infraction.

Failure to Act by Administrators or Staff – All staff have a duty to act to stop witnessed civil rights violations, as safely as can be done, and report such instances to program administrators. Failure to do so may result in disciplinary action.

Commitment to Non-Retaliation

The Collaborative will deal seriously with any and all threats or acts of retaliation for the good faith filing of a complaint. Such action will result in disciplinary proceedings. Staff will monitor situations to ensure that no threats or acts of reprisal are made. Program administrators may use non-disciplinary procedures to prevent retaliation from occurring.

Referral to Law Enforcement Authorities

The Executive Director or his/her designee has the responsibility of notifying the local police when they have reason to believe that a hate crime has been or is to be committed. This is mandatory for all hate crimes violations.

Documentation Requirements

Record keeping - records of all civil rights violations and hate crimes reported are maintained. Records will be compiled by program year. Record keeping will include particulars of the incident, response actions taken, results of the investigation and intervention.

Monitoring and tracking to identify patterns - Records should be maintained and monitored to detect patterns in violations, repeat offenders, and locations for problems. Actions will be taken once patterns have been revealed.

Dissemination of Information and Training

- This policy will be available to staff, individuals and guardians.
- Staff will receive training relevant to this policy annually during staff orientation.
- Individuals and guardians will receive this policy annually and at time of admission to a Collaborative program.
- This policy will be reviewed annually for compliance with state and federal law.

Individual Guidelines

Attendance and Tardiness: Individuals are encouraged to attend the Program on all days and on time. The individual or caretaker are expected to let staff know prior to 6:00AM if an individual will not be attending program that day, or will be tardy/dismissed.

Individuals/Guardians are to call the Program Dispatcher at 978-799-7358 to report program absences/tardiness that day. If an individual is absent or tardy and no phone call is made, a call will be made to the individual's home. Individuals who are tardy will be allowed to join the program day as long as they arrive before 11:00AM. Individuals leaving the program early will be allowed to do so as long as it is after 11:00AM. This policy may be adjusted based on unforeseen medical needs. Excessive unscheduled absences, dismissals, and tardiness are unacceptable.

Appropriate Language: Collaborative individuals are encouraged to behave in a professional manner which includes refraining from swearing, making rude comments or inappropriate noises, or using inappropriate voice levels.

Appropriate Dress: Individuals are expected to wear appropriate clothes for program or work. Individuals should adhere to the dress code of their worksite(s). Please refer to Appendix D for specific worksite dress codes.

Transportation: The Collaborative provides transportation for many individuals in the Today and Tomorrow Program. DDS Service Coordinators are responsible to contract for the transportation of individuals to/from program/home each day. Individuals cannot be driven to program or picked up from program without permission from authorized representative. Individuals/Guardians are to call the Program Dispatcher at 978-799-7358 for individuals who will not be using Collaborative transportation for that day. Individuals will only be permitted to be transported by those people the guardian has indicated are appropriate (See Release of Individuals to Adults Other than Guardians).

Appropriate Conduct: Individuals are expected to behave in an appropriate manner exhibiting respect for themselves and others at all times while in program or participating in Collaborative programs or activities.

Personal Property: The Collaborative strongly encourages that individuals do not bring valuable items to program. If the personal property of an individual causes disruption while at program, the Collaborative may take the property away from the individual. The Collaborative will make every effort to return all personal property to the individual or guardian. However, the Collaborative is not responsible for lost or stolen property, or compensating individuals or guardians for value of such property.

Drugs or Alcohol: No drugs or alcohol are permitted in program or on program grounds, and individuals are not permitted to come to program under the influence of substances. The possession, use, manufacture, distribution, sale, or possession with intent to sell, or dispensation of alcohol, marijuana, illegal drugs, or other illegal or controlled substances of any kind is strictly prohibited.

Smoking and Tobacco: The use of any tobacco products is prohibited within the Collaborative program buildings, the program facilities, on the program grounds, or on Collaborative vehicles by any individual, including program personnel.

Theft and Vandalism: Individuals are prohibited from stealing, vandalizing, or destroying the property of others, including property belonging to the Collaborative or its staff, faculty, individuals, guardians, volunteers, and visitors. Program pride is enhanced by a well maintained and clean building. The Collaborative hopes that all individuals will share in this belief. Individuals involved in theft, vandalism, graffiti, destruction of property, or arson will be required to reimburse the program for the materials and labor necessary to fix any damage they cause, and will be subject to appropriate disciplinary action, up to or including suspension, emergency termination, and legal action.

Weapons: The Collaborative strictly prohibits the possession of all weapons in program, on program grounds, program buses, or at any program functions. All knives, handguns, rifles, shotguns, other fire arms, explosives, incendiary devices, and other weapons are forbidden. If an individual is found to be in possession of such an object the weapon will be confiscated it and the police will also be contacted.

Violence and Threats of Violence: All violence and threats of violence (including physical fighting, assault, battery, kidnapping, threat of robbery, robbery using force, homicide, other drug-related or crime-related violence, and all acts that endanger or cause bodily harm to others) are strictly prohibited at program, the Collaborative, or Collaborative related activities. All threats of violence or physical attack will be taken seriously by the Collaborative.

Destruction of Property: Individuals are prohibited from the destruction of Collaborative property or the property of others.

Rules of Public Programs with Co-located Collaborative Programs: Individuals in Collaborative programs co-located within public programs/businesses are also subject to the rules of those public programs/businesses.

Internet Use

The Program provides individuals with Internet access in most locations. All individuals may have access to the Internet. Individuals using this access must read and adhere to the following use policies:

Authorized Use

That means we expect individuals to use Internet access primarily for program-related purposes, i.e. to research relevant topics and to obtain useful information. The following are specific provisions regarding authorized use of the Collaborative's Internet connection:

- Users may use the Collaborative's Internet services for personal improvement provided that such use is consistent with staff and program conduct.
- Internet use should be restricted to sites and materials such as news or information that might be considered reasonable if read as a text publication in a professional environment.

Unauthorized Use

Users shall not use the Collaborative's Internet services to view, download, save, receive, or send material related to the following:

- Offensive content of any kind, including pornographic material.
- Propagating a virus, worm, Trojan horse, or trap-door program code.
- Disabling or overload any computer system or network.
- Circumventing any system intended to protect the privacy or security of another user.
- Promoting discrimination on the basis of race, religion, ethnicity, disability, gender, sexual orientation race, age, or marital status.
- Visiting websites that promote threatening or violent behavior.
- Using the Internet for illegal activities including the illegal downloading of music, movies, or other copyrighted materials.
- Distributing commercial messages.
- Gambling web sites.
- Hosting of 'game servers' for online or network gaming.

The above list is by way of an example only and is not intended to be exhaustive.

MEDICAL POLICIES

The Program maintains a Program Nurse to promote the health and safety of its individuals, intervene with actual and potential health and behavioral issues, manage complex medical issues, and provide case management services. The Program Nurse makes the decision if an individual is to be sent home for medical reasons. All individuals must provide the following documentation: physical (required yearly) and dental exam (or opt-out option), up-to-date immunization records, list of all medications taken by individual, medical and guardian consents, and if applicable: verification to self-administer, any required action plans due to allergies, asthma, diabetes, seizures, and any diet or nutritional guidelines or restrictions. Every program year, individuals will be provided with a Valley Collaborative Health Packet containing relevant forms to be completed to ensure that the Collaborative has updated medical emergency contact information, medication information, and all other information relevant to the individual's health including guardian authorizations for treatment and /or the administration of medication. The Collaborative maintains a separate Health Services Manual with more detailed medical policies. Copies of the Health Services Manual are kept in the Collaborative nurse's office and are available for individuals upon request.

Please see Appendix E.

Please note no medication is to be brought to the Program without first consulting with the Program Nurse.

Special Medical Conditions

The Collaborative will maintain the individual's safety at all times. Individuals with special medical conditions (ex. allergies, asthma, seizure disorders, and diabetes) will be required to have a doctor's order on file (yearly) explaining any protocols and procedures.

Seizures: Seizure Action Plan - For any individuals whose seizure lasts more than 5 minutes an ambulance will be called (An exception will be made if a physician specifies in a physician's order.) An ambulance will be called immediately for any individual with no history of seizure activity. Parents/Guardians will be notified whenever any seizure activity has taken place.

Asthma: Asthma Action Plan – Individuals who have a diagnosis of asthma and require a rescue MDI (metered dose inhaler) or nebulizer treatment will have guidelines written by a physician; this includes any activity/weather/situation that exasperates the asthma and if the individual can self-administer the inhaler.

Allergies: Allergy Action Plan – For individuals with life threatening allergies who require an EpiPen, an Allergy Action Plan will be written by the Program Nurse; this includes individual name, DOB, allergies and reaction. The Program Nurse will ensure a valid physician's order for EpiPen is on file (required yearly). An ambulance will be called immediately if an EpiPen is used. Parents/Guardians will be notified whenever an allergic reaction has taken place. The Program Nurse will educate staff on signs and symptoms of allergic reactions.

Diabetes: Diabetic Treatment Plan - Individuals who have a diagnosis of diabetes will be required to have a treatment plan signed by a physician; this includes any glucose monitoring, medication to be administered, emergency protocol, and if the individual can self-administer/self-test blood glucose. The Program Nurse will educate staff about the signs and symptoms of hypo/hyperglycemia.

Diet and Nutrition: Any dietary guidelines or restrictions must be documented by a physician yearly. Staff will encourage healthy eating by following Executive Order of Health and Human Services 504.

Communicable Disease

In order to prevent the spread of communicable disease individuals with a diagnosed communicable disease will be advised to stay home for the following period of time as listed in the table below.

Communicable Disease	Requirements
Bacterial Conjunctivitis	May return to the Program after medical treatment has been provided for 24 hours.
Chicken Pox	May return to the Program after all lesions have dried and crusted or one week from appearance of first eruption.
German Measles	May return to the Program after rash has disappeared.
Measles	May return to the Program four days after first appearance of rash.
Impetigo	May return to the Program after all open sores have healed or is small enough that a Band-Aid will cover the entire area.
Strep Throat	May return to the Program after antibiotic treatment has been given for 24 hours.
Ringworm	May return to the Program after treatment with antifungal cream has begun; lesions should be covered.
Pediculosis /Scabies	May return to the Program when treated; scabies must be treated with anti-parasitic for 24 hours before individual may return to work or after one treatment.

Dismissal from Program due to Illness

The Program Nurse may exclude an individual from the Program for health reasons if the individual:

- Has returned from a hospital admission within the past 24 hours. This does not include routine tests or minor injuries. The individual will remain at home for observation for the first 24 hours.
- Has a temperature of 100.5 degrees tympanic (by ear). Temperature must be 98.6 for a full 24 hours prior to returning to the Program. The exception is an individual with a hypothalamic problem (temperature regulation problem) and is symptom free. Each case will be discussed individually.
- Has an infectious disease (Strep Throat/Pneumonia, etc.) and has not been on antibiotic therapy for 24 hours or as designated by MD.
- Eye drainage yellow/green in color with pink or red eyes, eyelids, etc.
- Any undiagnosed rash.
- Has a culture(s) pending (exceptions can be made at the discretion of the nurse).
- Is on respiratory precautions, cough/cold or has a significant change in respiratory secretions (green/yellow nasal drainage).

Hospital Re-Entry

To ensure the health and safety of every individual re-entering the Program following a psychiatric or medical hospitalization, the Program has adopted the following policy:

1. Any individual who has required a psychiatric evaluation, and emergency room visit, or had been placed in inpatient hospitalization will be readmitted to their respective program upon collaboration with their treatment planning team.
2. The individual can return to program with the receipt of a signed discharge summary from the hospital/clinician providing treatment and medical clearance from his/her medical provider.
3. This summary will ensure that the most recent and credible information regarding treatments goals and restrictions are relayed back to the Program and allow for a smooth transition.
4. The plan should include, in writing, any changes in medications, medical procedure, and any follow-up plans with clinicians, therapists, and any other treatment providers.

When this policy is followed, the Program can also ensure that the individual will be safe upon their return and provisions are in place should they decompensate once back in the setting

INDIVIDUAL SERVICE PLAN (ISP) PROCESS

ISP Development and Implementation

The Assistant Director of Adult Services or his/her designee is responsible for overseeing the implementation of all components of the individual's ISP.

- Where the ISP of the individual has been accepted in whole or in part by that individual's guardian, the Program provides the mutually agreed upon services without delay.
- There must be an ISP in effect for each enrolled individual. Individuals just beginning services with DDS will have an ISP scheduled within 60 days.
- Each provider described in the ISP is informed of his or her specific responsibilities related to the implementation of the individual's ISP and the specific accommodations, modifications, and supports that must be provided for the individual under it.

In circumstances where services may no longer be beneficial or that an individual's needs can no longer be met, the Collaborative will notify the ISP Team and set up a transition meeting. All appropriate parties will be notified at least ten (10) days in advance of meeting date.

Progress Reports

The Today and Tomorrow Program completes Annual and Semi-Annual Progress Reports to document ISP progress two times each year.

These Annual and Semi-Annual progress reports are submitted in HICSIS and sent to the DDS Service Coordinator. The Today and Tomorrow Program must comment on whether they anticipate the individual being able to meet the ISP goal(s) by the end of the ISP period. If they believe that the individual will be unable to meet the goal(s), that must be indicated on the progress report and a Team Meeting must be held to amend the ISP. Progress reports must answer two questions for each goal: (1) what is the individual's progress toward the annual goal? and (2) is the progress sufficient to enable the individual to achieve the goal by the end of the ISP period? Information included on the Annual/Semi Progress Reports will be derived from data collected throughout the reporting period. Copies of progress reports will be maintained in individual records.

Please see Appendix F for ISP Timeline.

Assessments

All individuals in the Today & Tomorrow Program are given the Assessment of Functional Living Skills (AFLS) upon starting the program and then annually afterwards. This assessment measures safety, adaptive living skills and work readiness. This helps to develop an Individual's Person Centered Plan which focuses on four domains; Community Living, Employment, Adaptive Living Skills and Quality of Life. Individuals actively participate in the annual review of their plans and assessments.

Please see Appendix G for AFLS and Appendix H for Person Center Plan.

STAFF RESPONSIBILITIES

Valley Collaborative considers its employees to be one of its most valuable resources and is committed to providing the supports and structures necessary for them to be successful in their positions. Supervisory staff work closely with Valley Collaborative employees to ensure services are being provided in a safe, skillful, and respectful manner. Regular team meetings are held to facilitate the highest levels of communication and support.

Feedback is regularly solicited from individuals, agency staff, parents/guardians, stakeholders and Valley Collaborative staff to continually measure the quality of staff providing services to individuals at various locations in the community. Valley Collaborative uses this feedback to continually improve upon programming and staff training and development. Individuals receiving services from Valley have formal and informal opportunities to provide feedback at the time of new staff hire and on an ongoing basis related to the performance of staff that support them.

At minimum, all Valley Collaborative staff are expected to:

- Follow all policies and procedures, manuals, and handbooks as outlined.
- Behave in a professional manner at all times while on program premises or at a function at which the staff is a representative of the Collaborative.
- Conduct day-to-day activities in a safe, responsible manner, and avoid situations that may endanger the safety of others.
- Maintain the security of confidential information. Unauthorized disclosure of confidential information is forbidden.
- Complete all trainings as required by the Collaborative and State Agencies.
- Provide accurate and non-judgmental information on all program records and reports.
- Regularly report to work on time, and give notification of any absences in a prompt and responsible manner in accordance with Collaborative policies and procedures.
- Complete assignments accurately and in a timely manner.
- Utilize only Collaborative-sanctioned modes of communication with individuals and follow all applicable laws, regulations, and Collaborative policies. This includes complying with the social media policy in the Valley Collaborative Employee Handbook.
- Support and advocate for the rights of all individuals in the Program.
- No smoking or other use of tobacco products and no illegal or unauthorized drugs or alcohol at any Collaborative program, field trip or function.

The above list is by way of an example only and is not intended to be exhaustive.

[End of Handbook]

Appendix A

Legal Binder Contents

Front Pocket

Emergency Fact Sheet

Record Access Log

1. Individual Service Plan

Vision

Provider Support Agreement

Semi Annual Progress

Annual Progress

2. Job Development

Resume

Work Preference

Work History

Applications

Acknowledgements from Worksites

Worksite Safety Assessments

Skills Assessments (3 Year)

3. Medical

Valley Collaborative Medical Information Packet

Valley Collaborative Medical Protocols

Seizure Protocol and Record of Seizure Activity

Immunization Record

Medical Treatment Assessments

OT/PT/REACH Assessments

4. Legal and Administrative

Emergency Fact Sheet/ID Sheet

Guardianship Papers

Supportive and Protective Devices Forms

Photograph Permissions

Release of Information Forms

Social Security/MA ID/Employment Verification/I9

Eligibility/CDAT

Incident Reports

Human Rights Training

Non-Clinical Correspondence

5. Inactive

Appendix B

Program Service Binder Contents

Tab 1 Goals

Tab 2 Assessments

Tab 3 Related Objectives, Weekly Progress Notes, Semi-Annual Progress Notes

Tab 4 Schedules

Tab 5 Governance: Human Rights Committee, Hiring, Evaluations

Tab 6 Supported Employment Tutorial Time

Tab 7 CBDS Tutorial Time

Appendix C

Admissions Checklist

Legal Documents:

- Copy of birth certificate
- Copy of social security card
- Court Mittimus (If individual is in the custody of the State)
- Guardianship Decree
- Court Appointment Letter (for individuals who have medical guardian)
- Conditions of Probation (if applicable)
- Signed Releases of Information completed by the Individual/ Legal Guardian
- Signed Acknowledgement of the Human Rights
- Signed releases for transportation/photographs and related permission slips
- Referral/Request Form
- Billing/Services Form

Medical/Health Documents:

- Physician's Orders for prescribed medications.
- Health and Immunization Record
- Standing Orders/Protocols from the physician with regards to medical issues (Epilepsy, allergic reactions, etc....)
- Copy of Rogers Orders (for individual's in state custody receiving psychotropic medications)
- Emergency Medical Form
- Copy of Insurance Card
- Copy of most recent psychiatric, neuropsychiatric, or other related evaluations and assessments.

Vocational Documents:

- I-9 Forms/Tax Forms/W-2
- Direct Deposit Form
- Copy of Social Security Card or Copy of Birth Certificate
- Copy of picture ID (if available)
- Vocational or Adaptive Assessments
- Copy of Social Security Benefit Statement (if applicable)
- Naturalization Card (if applicable)

Appendix D

Dress Code at Work Sites**September 16, 2019**

In order to continue to maintain our professional presentation in the community, it will be important to follow the dress code for each work site. Please see below:

Lantheus Medical Imaging (LMI)

- Closed toe shoes
- Clean and neat T-shirts without large graphics
- No shorts may be worn but Capri's are acceptable
- No tank tops
- No hats

3M Inc.

- Closed toe shoes
- No tank tops
- No shorts

Curriculum Associates

- Closed toe shoes

Community Catering

- Closed toe shoes
- No tank tops

Billerica Town Hall

- Closed toe shoes
- No tank tops

Salvation Army

- Closed toe shoes
- Clean and neat T-shirts
- No tank tops
- Shorts closer to the knee may be worn during summer months

D'Youville

- Closed toe shoes
- Clean and neat T-shirts
- No shorts may be worn but Capri's are acceptable

Bristol Myers Squibb (BMS)

- Closed toe shoes
- Clean and neat T-shirts without large graphics
- No tank tops
- No hats
- No shorts (Capri's are ok)

Cross Point

- Closed toe shoes
- Clean and neat T-shirts without large graphics
- Khaki material shorts may be worn in the summer
- No tank tops
- No hats

Chelmsford High and Tyngsboro High

- Closed toe shoes
- Clean and neat T-shirts
- No tank tops
- Shorts closer to the knee may be worn during summer months



Health Services Manual

Dear Parent/Guardian/Caregiver,

The Valley Collaborative Today and Tomorrow Program, in accordance with DDS and DPH, requires the following documentation to be on file and updated yearly.

.

- ☐ Copy of Annual Physical Exam, including list of current medications.
- ☐ Documentation of a dental exam within past year/ or a signed refusal form
- ☐ Valley Collaborative Health Packet, attached.
- ☐ Standing order permission form signed by physician and guardian.
- ☐ If individual has one of the following medical conditions, the following medical documentation is required (you may use doctor's own form or call Valley program nurse to receive a Valley Collaborative form):

- *Seizure Action Plan, signed by physician

- *Allergy Action Plan, signed by physician

- *Diabetes Action Plan, signed by physician

- *Diet Restrictions, signed by physician

If an individual is prescribed medication to be taken during program hours or is diagnosed with a medical condition, please contact the program nurse at 978-528-7889 or by email at malexa@valleycollaborative.org.

EMERGENCY MEDICAL INFORMATION

Individual's Name: _____ Date of Birth: _____

Address: _____ Telephone#: _____

Contact #1 -Parent/Guardian Name: _____

Address: _____

Email Address: _____

(In boxes below please list preferred contact order 1- being first 3- being last)

☐ Home phone#: _____☐ Work phone#: _____☐ Cell phone#: _____**Contact #2** -Parent/Guardian Name: _____

Address: _____

Email Address (optional): _____

(In boxes below please list preferred contact order 1- being first 3- being last)

☐ Home phone#: _____☐ Work phone#: _____☐ Cell phone#: _____**Emergency Contact (if parents cannot be reached)** -Name: _____

Telephone#: _____ Relation to Individual: _____

Diabetic: yes no (If yes, please see sheets attached)**Allergies:** yes no (If yes, please see sheets attached)

Allergy	Describe Reaction	Treatment

(Please use back of form if more room is needed.)

Asthma: yes no (If yes, please list below)

Asthma	Describe Reaction	Treatment

(Please use back of form if more room is needed.)

Seizure Activity: yes no (If yes, see sheets attached):

Describe Seizure	Treatment

Medical/Social/Emotional/Mental Health Diagnoses:

Individual's Name: _____ **Date of Birth:** _____

Insurance Information (to be used in the event of emergency hospitalization):

Insurance Company: _____ Policy#: _____

Policy Holder: _____

Medical Specialists

Primary Care Physician: _____ Telephone#: _____ Fax#: _____

Dentist: _____ Telephone#: _____ Fax#: _____

Other: _____ Telephone#: _____ Fax#: _____

EMERGENCY MEDICAL TREATMENT CONSENT

I understand that in the case of a Medical Emergency, requiring treatment or hospitalization, individual will be taken to the nearest treatment facility and given all lifesaving measures, unless otherwise indicated.

RELEASE OF RECORDS

I, **(circle one)** DO / DO NOT give the Valley Collaborative my permission to exchange medical information with the individual's medical team for the purpose of sharing pertinent information necessary for proper treatment.

Any information obtained by Valley Collaborative will be held in the strictest confidence.

Parent/Guardian Signature:

_____ Date: _____

If you do not wish for your individual to receive ANY medical treatment while attending Valley Collaborative Programs please sign the declination form below.

HEALTH CARE DECLINATION

I, _____, prefer that, _____ not
Receive any health care during program hours. In the event of an illness or injury while at program please
contact me at the following number(s): _____

Parent/Guardian Signature: _____ Date: _____

***Please note: This form will expire one year from date signed. Please inform program supervisor of any changes.**

PHYSICIANS MEDICATION ORDER FORM*Name of Individual:* _____ *Date of Birth:* _____*Address:* _____ *Telephone #:* _____*Physician/Clinic:* _____ *Telephone #:* _____*Allergies/Adverse medication reactions:* _____**MEDICATIONS TO BE GIVEN DURING DAY PROGRAM HOURS** _____

Medication & Dose	Route & Frequency	Treatment Purpose	Special instructions (Including parameters for vital sign monitoring, if needed)	Duration/Stop Date

I give permission for the program nurse or MAP certified personnel to administer scheduled medications while individual is at the program: _____ YES or NO _____

The program may only hold a thirty day supply of medication and that medication must be delivered to the program nurse by a parent/guardian/group home.

Parents/Guardians/Group home may retrieve the medication from the program at any time; however, the medication will be destroyed if it is not picked up within one week following termination of the order.

Does individual have Physician permission to self-medicate? _____ YES or NO _____

**Unless indicated by Physician, above medications may be administered by trained staff.*

MEDICATIONS BEING TAKEN BY INDIVIDUAL AT HOME _____

Medication & Dose	Route & Frequency	Treatment Purpose	Prescribed by

Physicians Signature: _____ **Date:** _____

Parent/Guardian Signature: _____ **Date:** _____

****Please note: This form will expire one year from date signed. Please inform Nursing Department of any changes.***

Individual's Name: _____ Date of Birth: _____

PHYSICIAN PERMISSION for STANDING ORDERS

Nurse, MAP trained staff or Individual named above may administer/self-carry the following over the counter medication as needed with a physician's permission.

Please draw a line through any item you do not want given.

1. Acetaminophen (Tylenol) every 4 hours for complaint of pain or fever over 100.5 degrees.

Dosage: Over 60lbs give 325- 650mg by mouth. Not to exceed 4g/day

2. Ibuprofen (Motrin/Advil) every 6 hours for complaint of pain or fever over 100.5.

Dosage: Adult 200-400mg by mouth. Not to exceed 3.2g/day

3. Oral pain reliever for tooth pain or mouth sores as needed.
4. Calcium Carbonate antacid (Tums) for indigestion up to 2 tabs for one dose only.
5. Diphenhydramine (Benadryl) every 4 hours as needed for *allergic reactions: itching, and/or hives.*

Dosage: Weight over 50lbs. give 25mg by mouth

6. Hydrocortisone skin ointment 1% for itch.
7. Cough drops as needed for throat discomfort/cold symptoms.
8. Neosporin to affected areas as needed

Prescription PRN Medications below must be provided by the family:

1. Rescue Inhaler: Order to be written and signed by MD.

Order:

2. Diabetes testing supplies and Insulin: must be accompanied by the signed Diabetic Action Plan.
3. Epi-Pen: must be accompanied by an MD order and Allergy Action Plan

Dosage and administration for anaphylactic reaction, laryngeal edema, or hives:

Adult: 0.3cc IM or SC (weight greater than or equal to 50lbs.)

****Repeat injection in 5-15 minutes if the individual's condition has not improved/deteriorated and EMS has not arrived yet. ****

Does physician give permission for individual to self-administer/self - carry above medications? YES or NO
Assessment form with MD signature must be completed and attached.

Physician Signature: _____ **Date:** _____

Physician Name/Clinic: _____ **Tel:** _____

Parent/Guardian Signature: _____ **Date:** _____

***Please note: This form will expire one year from date signed. Please inform Program Supervisor/Nursing Department of any changes.**

INDIVIDUALIZED SEIZURE PROTOCOL

NAME _____ DOB _____

TYPE OF SEIZURE _____ DURATION _____

LAST SEIZURE _____

DESCRIPTION _____

CALL EMS (911)

- If seizure last greater than _____ minutes (VC policy 5 minutes)
- If the individual has one seizure after another **yes** **no**
- If there is a CHANGE in a seizure pattern **yes** **no**
- If the individual has been injured **yes** **no**
- If individual has a seizure who has an INACTIVE pattern (greater than 1year) **yes** **no**

- Other instructions or any changes to the above statement: _____

CALL NEUROLOGIST- (*Program Nurse will call*)

- If the seizure last longer than _____ minutes.
- If the individual experiences _____ seizures in 24 hour period.
(Number)
- If the individual experiences _____ seizures in a week.
(Number)
- If individual has a seizure who has an INACTIVE pattern (greater than 1year) **yes** **no**
- If post seizure behavior (confusion, agitation, decrease in activity etc.) continues longer than 30 minutes
yes **no**

Additional Information: _____

Physician Name: _____ Tel: _____

Physician Signature: _____ Date: _____

Parent/Guardian Signature _____ Date: _____

Seizure Protocol

PROTOCOL:

1. All individuals' physical safety will be insured at all times.
2. **For seizure lasting more than 5 minutes 911 will be called & individual will be transported to nearest hospital.** (An exception will be made if a physician specifies in a physician's order.)
3. For students who exhibit any seizure like activity and do not have a current seizure diagnosis **911 will be called immediately & individual will be transported to nearest hospital.**
4. Guardian/parent will be notified whenever any seizure activity has taken place.
5. Individuals with a diagnosed seizure activity must have protocol signed by Physician.
6. When possible, two staff members should be present when an individual is having a seizure, one staff to maintain safety, one staff to make phone calls if necessary.
7. If individual has a witnessed, unwitnessed or suspected head or other bodily injury, **911 must be called.**

PROCEDURE:

1. As soon as seizure activity is noted, a safe position will be established either in their chair or on the floor.
2. Remove any furniture or equipment that may pose as a safety issue.
3. Loosen clothing around neck and chest and release body jacket if wearing one.
4. Turn person onto side or if sitting tip head slightly forward.
5. Never place anything in the mouth (tongue depressor or airway).
6. Do not try to restrict the person's movements.
7. Stay with the person until motor segment of the seizure is over.
8. During the seizure observe the characteristics of the seizure including the following:
 - ☐ Precipitating factors (fever, menses, loud noise, bright lights etc.)
 - ☐ Time of onset
 - ☐ Aura
 - ☐ Clinical progression of the seizure activity (from arm twitching to generalized activity) skin pallor, cyanosis of tongue or around the mouth
 - ☐ Loss of consciousness
 - ☐ Duration of motor activities
 - ☐ Post-ictal state (sleepy, lethargic, confusion, crying, vocalizing, and headache).
9. Document the seizure on Seizure Activity Flow sheet.
10. As per protocol, inform parents/guardian that seizure activity has occurred.

Individuals name; _____ Date of birth: _____

Parent/Guardian Signature: _____ Date: _____

Individual with a diagnosed seizure activity must have protocol signed by Physician. Form valid for one year from date signed.

Physician Use only

____ Please use the above protocol for my patient.

____ Please follow alternate protocol for my patient. Protocol is attached.

Physician's additional instructions:

ALLERGY ACTION PLAN

Name: _____ Date of birth: _____

ALLERGY TO: _____Asthmatic: ☐ Yes* ☐ No *Yes= Severe risk for reaction**SIGNS OF AN ALLERGIC REACTION:****Systems: Symptoms:****MOUTH** Itching & swelling of the lips, tongue, or mouth**THROAT** Itching and/or a sense of tightness in the throat, hoarseness and hacking cough**SKIN** Hives, itchy rash, and/or swelling about the face or extremities**GUT** Nausea, abdominal cramps, vomiting and/or diarrhea**LUNG** Shortness of breath, repetitive coughing, and/or wheezing**HEART** "Thready" pulse, "passing-out"**The severity of symptoms can quickly change.*****All above symptoms can potentially progress to a life-threatening situation.**

1. If ingestion is suspected and/or symptoms are: _____

_____, give **IMMEDIATELY!**2. **Call 911. DO NOT HESITATE TO CALL EMS/ 911!!!**

3. Notify Parent/Guardian- Name: _____

(In boxes below please list preferred contact order 1- being first 3- being last)

☐ Home phone#: _____☐ Work phone#: _____☐ Cell phone#: _____**Emergency Contact (if parent/guardian cannot be reached):**

Name: _____

Telephone#: _____ Relation to student: _____

Parent/guardian Signature: _____ Date: _____

For physician use only:

Physician Name _____ Phone#: _____

Physician Signature: _____ Date: _____

Does above individual have permission to self- medicate? Please circle: yes or no

**A medication order and Allergy Plan must be on file for any individual with an allergy that requires an EpiPen.
Physician may use this form or provide their own.*

Diabetic Action

Individual's Name: _____ Date of birth: _____

Mild to Moderate Hypoglycemia	Treatment
<ul style="list-style-type: none"> • Behavior changes (may include): <ul style="list-style-type: none"> • Acting quiet and withdrawn • Being stubborn or restless • Tantrums of sudden rage • Confusion • Inappropriate emotional responses (eg: laughter, crying) • Poor concentration or day dreaming • Shakiness • Sweatiness • Headache • Dizziness • Pallor • Increased Heart Rate • Staggering walk • Uncontrollable crying episode • Slurred speech • Blank stare • Refusal to take anything by mouth 	<p>If blood sugar is below: _____</p> <ul style="list-style-type: none"> • If you don't know what the blood sugar is, treat the symptoms. • Give the individual some quick-acting sugar such as: <ul style="list-style-type: none"> 2 – 4 glucose tablets if ordered 3 – 4 ounces of juice 6 – 8 ounces of REGULAR soda 6 – 8 ounces Milk • Check the blood sugar 10 -20 minutes after treatment. If the blood sugar result is less than 80, or if the individual still has symptoms, repeat the quick sugar treatment and blood sugar testing cycle until the individual is symptom free and the blood sugar result is above 80. • When the individual feels better and the blood sugar result is above 80, give additional snack if next meal is more than 30 minutes away and/or if the child will be participating in active play/ sports following this low blood sugar episode. • The individual may resume program activities after the blood sugar is above 80 and the individual is symptom free. • Notify parent/ guardian as soon as possible

Symptoms Individual *may* exhibit:

Mild to Moderate Hyperglycemia	Treatment
<ul style="list-style-type: none"> • Frequent urination • Increased thirst • Blurred vision • Fatigue • Headache • Fruity-smelling breath • Nausea and vomiting • Shortness of breath • Dry mouth • Weakness • Confusion • Coma • Abdominal pain 	<p>If blood sugar is over: _____</p> <ul style="list-style-type: none"> • If the Individual has warning signs of high blood sugar, check the blood sugar. • Encourage water • NEVER WITHHOLD FOOD FOR HIGH BLOOD SUGAR! • Notify parent/guardian

Severe Hypoglycemia	Treatment
<ul style="list-style-type: none"> • Unconscious • Unresponsive • Convulsion-like movement • Failure to respond to cake icing (gel type) or glucose gel 	<ul style="list-style-type: none"> • Be sure the Individual is lying down in a safe area protected from head and bodily injury. • Position the individual on his/her side • Call 911 • Inject glucagon if ordered/available. (RN only, if a registered nurse is unavailable to administer, 911 should be called) • Please note that as the individual regains consciousness, nausea and vomiting may occur • Notify parent/guardian as soon as possible

Diabetic Action

Individual's Name: _____ Date of birth: _____

Daily Medications: _____

Physician Name: _____ Phone Number: _____

Physician signature: _____

Notify Parent/Guardian- Name: _____

(In boxes below please list preferred contact order 1- being first 3- being last)

☐ Home phone#: _____

☐ Work phone#: _____

☐ Cell phone#: _____

Emergency Contact (if parents cannot be reached) -Name: _____

Telephone#: _____ Relation to Individual: _____

Program Nurse Signature: _____ Date: _____

Program Nurse Phone Number: 978-528-7889

Valley Collaborative Feeding & Diet SheetTo be completed by Physician

Individual's Name: _____

Date of Birth: _____ Weight: _____ Height: _____

Allergies: _____

Reason for Modified Diet:

History of Aspiration?

☐ Yes, when: _____☐ No

Has this individual undergone past feeding evaluation or Modified Barium Swallow Study?

If yes, please attach copies of all reports to this form. Please see attached release of information form.☐ Yes☐ No**Current Diet Recommendations:****Texture:**

- ☐ Regular/Solid
- ☐ Mechanical Soft
- ☐ Ground
- ☐ Pureed with some texture possible
- ☐ Pureed
- ☐ Non-oral-feeding tube

Liquid Consistency:

- ☐ Regular/Thin
- ☐ Nectar/Thick
- ☐ Honey Thick
- ☐ Pudding
- ☐ Non-oral-feeding tube

Medications:

- ☐ Whole with water
- ☐ Whole with puree
- ☐ Crush and mix with puree
- ☐ Use liquid form
- ☐ Non-oral feeding tube

Physician Signature: _____ Date: _____

Dental Refusal Form

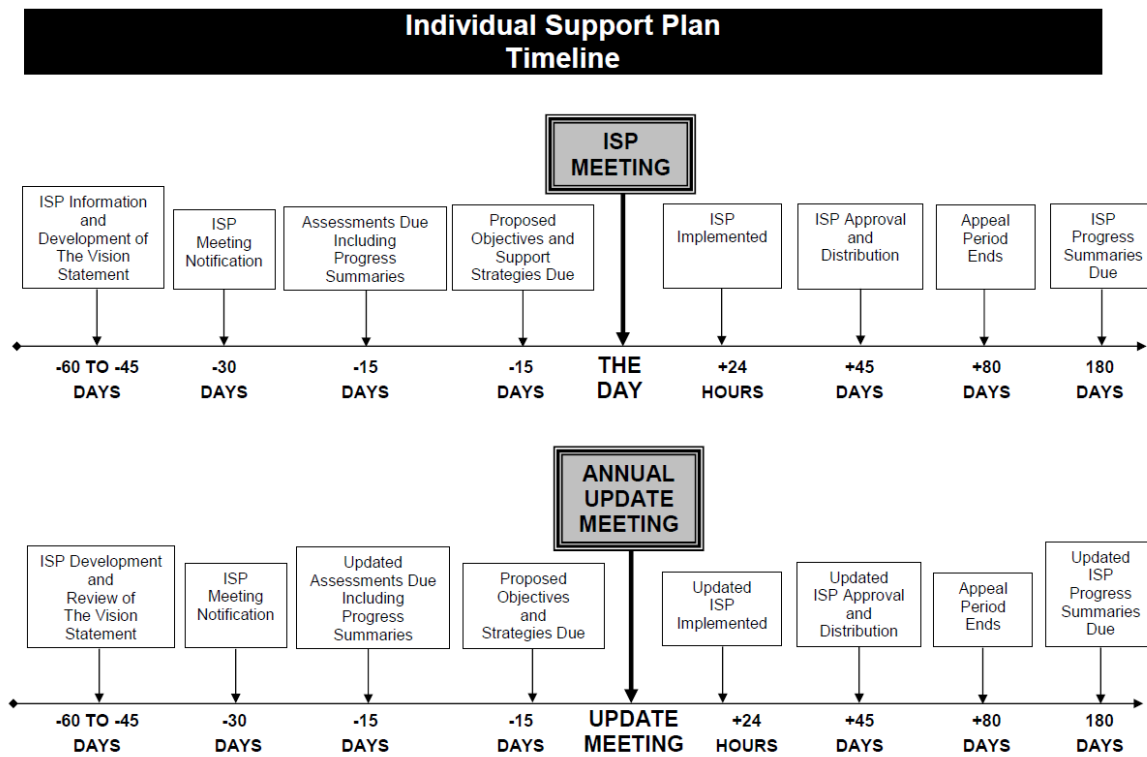
I, _____, am opting not to receive dental care at this time. This includes any preventative care such as cleanings and checkups.

Individual Signature: _____

Guardian Name: _____

Guardian Signature: _____

Date: _____



Appendix G

Assessment of Functional Living Skills BASIC VOCATIONAL SKILLS Employment Assessment: 3168, 3181, CBDS 3163 SAFETY Assessment: 3168, 3181, CBDS 3163		Site: Date:	Site: Date:	Site: Date:	Site: Date:
NAME: _____					
Current or New WORK GOAL (3181 & 3168): _____					
ISP Process Cycle: (Circle One) Full Semi Year 1 Annual Semi Year 2					
1a	Punctuality:	Facilitator:			
	Transitions to work on time consistently				
	Sometimes Transitions to work without issue				
	Rarely transitions to work on time without issue				
1b					
	Transitions from work on time consistently				
	Sometimes transitions from work without issue				
	Rarely transitions from work on time without issue				
2a	Attendance:	Start Date:			
	Rarely or never misses work				
	Misses work less than twice per month				
	Misses work more than twice per month				
2b					
	Notifies employer when absent or tardy				
	Sometimes notifies employer when absent or tardy				
	Rarely/ Never notifies employer when absent or tardy				
3	Hygiene:	Due Date:			
	Always maintains appropriate hygiene for work				
	Maintains appropriate hygiene at least half of work days				
	Rarely or never arrives to work with appropriate hygiene				
4a	Grooming/Clothing	Date Entered into Database:			
	Always dresses appropriately for work				
	Requires occasional reminders to dress appropriately for work				
	Rarely or never dresses appropriately for work				
4b					
	Always keeps self and clothing clean when performing tasks				
	Requires verbal reminders to keep self and clothing clean when performing tasks				
	Rarely or never keeps self and clothing clean when performing tasks, even with verbal reminders				
4c					
	Always adjusts clothing when needed				
	Requires verbal reminders to adjust clothing when needed				
	Rarely or never adjusts clothing when needed, even with verbal reminders				
5	Accepting Criticism/Admitting Mistakes				
	Recognizes and self corrects mistakes when possible and voluntarily notifies supervisor				
	Acknowledges their mistake when asked if they did something incorrect				
	Never accepts mistakes or criticism without negative behavior				

Assessment of Functional Living Skills BASIC VOCATIONAL SKILLS Employment Assessment: 3168, 3181, CBDS 3163 SAFETY Assessment: 3168, 3181, CBDS 3163		Site: Date:	Site: Date:	Site: Date:	Site: Date:
NAME: _____		Job Coach/Job Developer Name: _____			
Current or New WORK GOAL (3181 & 3168): _____					
Current or New CBDS GOAL (3163): _____					
6	Greet Others				
	Initiates and returns greetings				
	Returns greetings				
	Never initiates or returns greetings				
7	Demonstrates Eye Contact when Talking with Others				
	Always maintains eye contact				
	Remains physically orientated to speaker but requires verbal cues to maintain eye contact				
	Never maintains eye contact				
8a	Interacting with Others				
	Always uses friendly and courteous interactions with everyone				
	Only uses friendly and courteous interaction style with people they know				
	Rarely or never uses courteous interaction style				
8b	Respects Personal Space of Others				
	Maintains acceptable space between others				
	Requires occasional reminders to respect others personal space				
	Always requires reminders to respect others personal space				
9a	Remains Calm at Work				
	Consistently reacts appropriately/calmly to given situations				
	Reacts inappropriately or in a disruptive manner once per week				
	Frequently reacts inappropriately or in a disruptive manner				
9b	Demonstrates Non-Disruptive Behavior at Work				
	Never disrupts work environment				
	Requires occasional reminders to correct disruptive behavior while working				
	Frequently requires reminders to correct disruptive behavior while working				
9c	Displays Trustworthiness				
	Is truthful with employers and employees and does not steal				
	Does not steal at work				
	Has not demonstrated trustworthiness				
10a	Follows Simple Verbal Direction				
	Consistently follows 4-step directions				
	Consistently follows 3-step directions				
	Consistently follows 2-step directions				
	Consistently follows 2-step directions with verbal prompts only				
10b	Follows Written Direction				
	Consistently follows 4-step written directions				
	Consistently follows 3-step written directions				
	Consistently follows 2-step written directions				
	Consistently follows 1-step written directions				

Assessment of Functional Living Skills BASIC VOCATIONAL SKILLS Employment Assessment: 3168, 3181, CBDS 3163 SAFETY Assessment: 3168, 3181, CBDS 3163		Site: Date:	Site: Date:	Site: Date:	Site: Date:
NAME: _____		Job Coach/Job Developer Name: _____			
Current or New WORK GOAL (3181 & 3168): _____					
Current or New CBDS GOAL (3163): _____					
11	Confirms Information	Asks for clarification when needed			
		Tells instructor when confused			
		Does not confirm information when confused			
12a	Attention to Task	Remains focused and attentive to tasks up to 45 mins			
		Remains focused and attentive to tasks up to 30 mins			
		Remains focused and attentive to tasks up to 15 mins			
		Remains focused and attentive to tasks up to 5 mins			
13a	Takes Breaks	Takes scheduled breaks and returns on time independently			
		Sometimes requires prompts to take scheduled breaks and return on time			
		Always requires prompts to take scheduled breaks and return on time			
13b	Lunch/Breakroom Etiquette	Always appropriate, demonstrates behavior and follows norms and rules when in break room			
		Sometimes appropriate, demonstrates behavior and follows norms and rules when in break room			
		Rarely appropriate, demonstrates behavior and follows norms and rules when in break room			
14	Learn New Skills	Learns most skills after one demonstration			
		Learns skills after five or less demonstrations			
		Requires more than five demonstrations			
15a	Task Performance	Always agrees to complete non-preferred tasks			
		Sometimes agrees to complete non-preferred tasks			
		Requires prompts to complete non-preferred tasks			
		Refuses to complete non-preferred tasks			
15b	Performing all Assigned Tasks During Shift	Independently and consistently performs all job tasks and expectations throughout entire shift			
		Occasionally requires verbal prompts to ensure all job tasks are completed			
		Always requires prompting to ensure all job tasks are completed			
16	Speed	Maintains expected speed on job			
		Occasionally requires reminders to maintain expected pace			
		Always requires reminders to maintain expected pace			
17	Prioritizing	Always independently prioritizes tasks correctly			
		Occasionally requires verbal prompts to prioritize tasks correctly			
		Requires job coach to prioritize tasks correctly			

Appendix H

Person Centered Plan
Annual Review

Name: _____ Date: _____

Next Review Date: _____ Case Manager: _____

QUALITY OF LIFE: CBDS

Any changes to Physical Needs:

Any changes to Mental Needs:

Any changes to Spiritual Needs:

Any changes to Social Needs:

ADULT LIVING: CBDS

Any changes in Adaptive Living Skills?

Any changes in Adaptive Living Strengths?

Any changes in Adaptive Living Skills?

COMMUNITY ENGAGEMENT: CBDS

What does your community mean to you?

What are your interests in the community?

What types of leisure activities do you want to pursue?

EMPLOYMENT

What new Skills do you have?

What new Abilities do you have?

What are your career choices?

Additional Comments:

Program Coordinator Name: _____

Signature: _____ Date: _____

Individual Name: _____

Signature: _____ Date: _____

Appendix I



2019 - 2020 Program Calendar

Valley Today and Tomorrow Program

July 2019						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August 2019						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September 2019						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October 2019						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 2019						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 2019						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2020						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February 2020						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

March 2020						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April 2020						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2020						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24/3	25	26	27	28	29	30

June 2020						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

	Professional Development Day for All Staff - Program Closed
	Holiday / School Vacation
	Holiday Week / Valley Closed

	Early Release - PD for All
	Board Meeting
	Early Release

Appendix J

VALLEY COLLABORATIVE**Individual/Guardian Acknowledgement of Receipt
of Today and Tomorrow Program Handbook &
Policies and Procedures Manual****Individual's Name:**

Guardian's Name:

By signing below the individual/guardian acknowledge we have received a copy of the Today and Tomorrow Program Handbook & Policies and Procedures Manual.

Individual's Signature:

Date:

Guardian's Signature:

Date:



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: September 19, 2019
Re: Tyngsborough Renovation Update

Following the 2018-2019 Valley Collaborative School Year – the Elementary Program packed up their belongings and transitioned to the Tyngsborough Middle School for the Summer Program. This departure was due to the major demo work and renovations being completed at their building.

Three months later, the Tyngsborough Elementary Staff and Students have returned home to a building that is now equipped with a state of the art – Heating, Ventilation and Air Conditioning System. In addition to the HVAC renovation was the installation of brand new windows in the gymnasium, reception area, conference room and several classrooms on the right wing of the building.

All of the floors in the building have been stripped and waxed and majority of the doors and walls have been touched up and painted. At months end, Tyngsboro Elementary will also showcase a brand new reception area. The same concept has been constructed at both 25 Linnell Circle and 40 Linnell Circle.

Required Action:

None

Attachments:

None



Central Administration Office

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

MEMORANDUM

To: Dr. Chris A. Scott, Executive Director
Valley Collaborative Board of Directors
From: Dr. Lori Likis, Principal Consultant, Creative Coaching for School Improvement
Date: September 19, 2019
Re: Valley Collaborative District Five Year Improvement Plan Update

Valley Collaborative Board Update September 19, 2019

Over the past four years, the Valley Collaborative team has continued to make impressive progress in implementing the Valley Collaborative District Improvement Plan 2015-20. The June Board meeting presentation by Valley's Leadership Team, "Valley Collaborative by the Numbers," spoke for itself in terms of the impact of Valley's work over these years. For an organization that had little data to work with five years ago when we created the district plan, this presentation is both evidence of and a reflection of Valley's growth and progress.

The SY19-20 school year, which is the final year of the current district plan, will be a busy one for Valley Collaborative in terms of district planning work. Over the course of this school year, Dr. Scott and her team will continue implementing strategic initiatives defined by the District Improvement Plan 2015-20 and begin the planning process for the creation of the next District Improvement Plan.

During the first half of the school year, September through December 2019, Dr. Scott and her team will review the existing district plan to identify strategic initiatives currently underway and those not yet undertaken and prioritize work for the remainder of this school year. They will then develop action plans to support implementation of these initiatives.

From January through June 2020, Dr. Scott and her team will work to assess Valley's progress under the current plan and learn from that progress. We will first identify work from the 2015-20 plan that should be carried forward in the next plan. We will then assess Valley's overall progress in relation to the 2015-20 plan's outcome measures. We will conduct root cause analyses of key data points and trends, digging deeply into analyzing Valley's current context and identifying sources of success as well as potential blocking issues.

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

In the fall of 2020, we will move into the second phase of the planning process, creating an inclusive Planning Team that will envision the future of Valley Collaborative and build a plan that responds to that vision and our analysis of the current context. This Planning Team will once again consist of Valley parents, staff, and community partners, as well as Special Education Directors, School Committee members, and Board members. Dr. Scott and her team will build this schedule in conjunction with the Board and sending district leaders but anticipate work in the September 2020 to January 2021 timeframe.

I look forward to working with Dr. Scott and her team this year, as they complete the current plan and identify the lessons learned that will inform the next District Improvement Plan for Valley Collaborative.

Required Action:

None

Attachments:

District Improvement Plan



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>If we...</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>Then we will...</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 	
Status Key	
Completed: Benchmark action taken, no further action is required.	
Met: Demonstrated proficiency of criteria or standard.	
Ongoing: Benchmark action taken and will be monitored periodically as indicated.	
In Progress: Benchmark is in the process of being worked on.	



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



Action Plan

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



Action Plan

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



Action Plan

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



Action Plan

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



Action Plan

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



Action Plan

Strategic Objective:

- 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



Action Plan

Strategic Objective:

- 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



Action Plan

Strategic Objective:

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



Action Plan

Strategic Objective:

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

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



Action Plan

Strategic Objective:

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

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



Action Plan

Strategic Objective:

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

Initiative:

- 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



Action Plan

Strategic Objective:

- 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



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:

- 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
In order to effectively assess community involvement and more specifically, understand how to maintain or increases 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. 1. Develop a task committee to assess engagement of student and families at Valley Collaborative. a. Develop meeting schedule	Brian Mihalek, Asst. Principal	December 2015	Completed
2. Committee meeting to discuss: 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	Task Committee	December 2015	Completed
3. Committee meeting to discuss: 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	Task Committee	December 2015	Completed
4. Committee meeting to discuss: a. Rough draft of student survey b. Rough draft of parent survey 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 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	Task Committee	January 2016	Completed
5. Committee meeting to discuss: a. "Sense of Belonging" definition b. Discuss committee feedback on student and parent survey c. Discuss modifications to different surveys for different populations d. Discuss Google Doc survey as main method for student survey	Task Committee	February 2016	Completed



Action Plan

Strategic Objective:

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 surveysFinalize site specific recommendation action plan with timelineStart to generate staff survey questions	Task Committee	December 2016	Completed
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17. Sense of Belonging Committee meeting to discuss:	Task Committee	January 2017	Completed
<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 			
18. Sense of Belonging Committee meeting to discuss:	Task Committee	March 2017	Completed
<ul style="list-style-type: none"> Review final site specific and collaborative wide recommendation action plan Finalize staff survey 			
19. Sense of Belonging Committee meeting to discuss:	Task Committee	Dec 17, 2018	Completed
<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 			
20. Sense of Belonging Committee meeting to discuss:	Task Committee	Jan 16, 2019	Completed
<ul style="list-style-type: none"> Timeline for student survey Create site specific results page 			
21. Sense of Belonging Committee meeting to discuss:	Task Committee	Feb 27, 2019	Completed
<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 			
22. Sense of Belonging Committee meeting to discuss:	Task Committee	April 3, 2019	Completed
<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) 			
23. Sense of Belonging Committee meeting to discuss:	Task Committee	April 11, 2019	Completed
<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 			
24. Implement Sense of Belonging Student Survey	Task Committee	September 2017	A. Complete B. Complete C. Complete D. Complete
a. April 2016 (baseline) b. April 2017 c. Fall 2018 d. Spring 2019			



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) 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. 	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



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: September 19, 2019
Re: New Valley Website

We are happy to announce that Valley has unveiled its new website.

Special thanks to the website team for all their great work.

Required Action:

None

Attachments:

None

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



Central Administration Office

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 19, 2019
Re: Transportation Update

Valley received three quotes to trade in seven vans. After receiving quotes from three different vendors Stoneham Ford gave us the lowest quote. Not only did Stoneham Ford give us the lowest price for the FY'19 vans, they are upgrading Valley's vans to FY'20 vans at no additional cost.

Required Action:

None

Attachments:

None

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



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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 19, 2019
Re: Communications

The following topics will be covered in our Communications Tab:

- Staff Orientation Day Materials
- Organizational Charts
- State Agencies
- Valley Extra Curricular
- School Monthly Updates
- Community/Staff Feedback
- Parent Communications
- Resignation Letters
- MOEC Treasurer's Report

Required Action:

None

Attachments:

Staff Orientation Memo/Agenda/Photos
Organizational Charts
State Agencies Information
Valley Extra Curricular
School Monthly Updates
Community/Staff Feedback
Parent Communications
Resignation Letters
MOEC Treasurer's Memo/Report

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



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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 19, 2019
Re: Communications – Staff Orientation Day Materials

The following Staff Orientation Day Materials are attached for your review:

- Staff Invitation
- Staff Orientation Day Agenda
- Staff Orientation Day Photos

Required Action:

None

Attachments:

Staff Invitation
Staff Orientation Day Agenda
Staff Orientation Day Photos

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



Central Administration

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Dear Valley Collaborative Staff,

We look forward to seeing you at Orientation Day on Tuesday, September 3, 2019 at the Billerica Lodge of Elks, 14 Webb Brook Rd, Billerica at 7:30 a.m. We are working to ensure this coming year is full of endless possibilities for our students and adults participating in our DDS and MRC programs so they can reach their fullest potential. Valley Collaborative undoubtedly has the most dedicated and caring staff who work tirelessly to serve a challenging population of students and adults. You should all be proud of the extraordinary impact you continue to have on Valley students, adults and their families.

We are excited to announce that Jeffrey C. Riley, Massachusetts Commissioner of the Department of Elementary and Secondary Education, will be this year's keynote speaker. Commissioner Riley was appointed Massachusetts' 24th commissioner of elementary and secondary education in early 2018 and began serving as commissioner on April 5, 2018. A Massachusetts native, Mr. Riley's experience spans urban and suburban districts and includes teaching in Baltimore, Md., being principal of Tyngsboro Middle School, and being principal of Boston's Edwards Middle School. In January 2012, Commissioner Riley was appointed superintendent/receiver of the Lawrence Public Schools. During his more than six years there he led a team that brought major improvements by shifting more resources and autonomy to the school level, expanding the school day, increasing enrichment opportunities, and ensuring all schools had great leaders and teachers. Commissioner Riley lives in Boston and holds a bachelor's degree in philosophy from Pomona College in California, a master's degree in counseling from Johns Hopkins University in Maryland and a master's degree in school administration, planning and social policy from Harvard University.

This year our guest speaker will be Dr. Anthony Bent. Dr. Bent holds a bachelor's degree, master's degree and doctorate from Boston College. His career includes the following: foreign language teacher, high school department head, and district coordinator of foreign languages. He also has held central office positions in Watertown and was superintendent in Shrewsbury for fifteen years. In 2008-2009, Dr. Bent was president of the Massachusetts Association of School Superintendents (MASS). From 2009-2014 he was interim superintendent in three districts (Masconomet Regional, Leominster, Groton-Dunstable). Dr. Bent was elected to the Wellesley School Committee in 2015. Under the auspices of the Massachusetts Association of School Superintendents (MASS), Dr. Bent co-leads the Assistant Superintendent Leadership Seminars (ASLS), a program that focuses on developing the leadership capacity of Assistant Superintendents and other Central Office administrators. Additionally, he chairs the Global Studies-21st Century Skills Committee of MASS. For five years Dr. Bent has facilitated Valley's "Leadership at Every Level" professional development series. This year we will welcome Dr. Bent again to share his knowledge and expertise with Valley Administrators and future Administrators.

In addition to our keynote speaker and guest speaker, we will have a few short presentations on new or improved systems or procedures. We will conclude before lunch and staff will be asked to return to their schools or central office to work on their mandated trainings or other items as designated by their Principal/Supervisor.

Thanks for all you do to make Valley a great place to work. Enjoy the last days of summer. We look forward to seeing everyone on Tuesday, September 3rd!

Sincerely Yours,

Dr. Chris A. Scott
Executive Director



Central Administration

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

**Orientation Day
2019-2020 School Year
Tuesday, September 3, 2019
Billerica Lodge of Elks
14 Webb Brook Road, Billerica, MA**

7:30 a.m.	Registration and Continental Breakfast
8:00 a.m. Dr. Chris A. Scott, <i>Executive Director</i>	Welcome Collaborative Philosophy Mission Statement Organizational Chart District Improvement Planning Update Annual Report Highlights 'Valley by the Numbers'
9:00 a.m.	Welcome Honorary Guests: Commissioner Jeffrey Riley Leldamy Correa, Chief of Staff Dr. Judy Klimkiewicz, DESE Management Consultant for College, Career Education and Workforce Development Dr. Anthony Bent, MASS Leadership Consultant Tim Piwowar, Valley Chair, Billerica Public Schools Superintendent
9:00 a.m.	Keynote Speaker – Commissioner Jeffrey C. Riley Massachusetts Commissioner of Elementary and Secondary Education
9:30 a.m.	Guest Speaker – Dr. Anthony Bent Consultant for Massachusetts Association of School Superintendents (MASS) and Previous Superintendent of the Year
10:00 a.m.	Closing Remarks
10:30 a.m.	Return to Schools for Mandatory Trainings







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: September 19, 2019
Re: Communications – Organizational Charts

The following Organizational Charts are attached for your review:

- FY'20 Valley Organizational Chart
- FY'20 Adult Services Organizational Chart

Required Action:

None

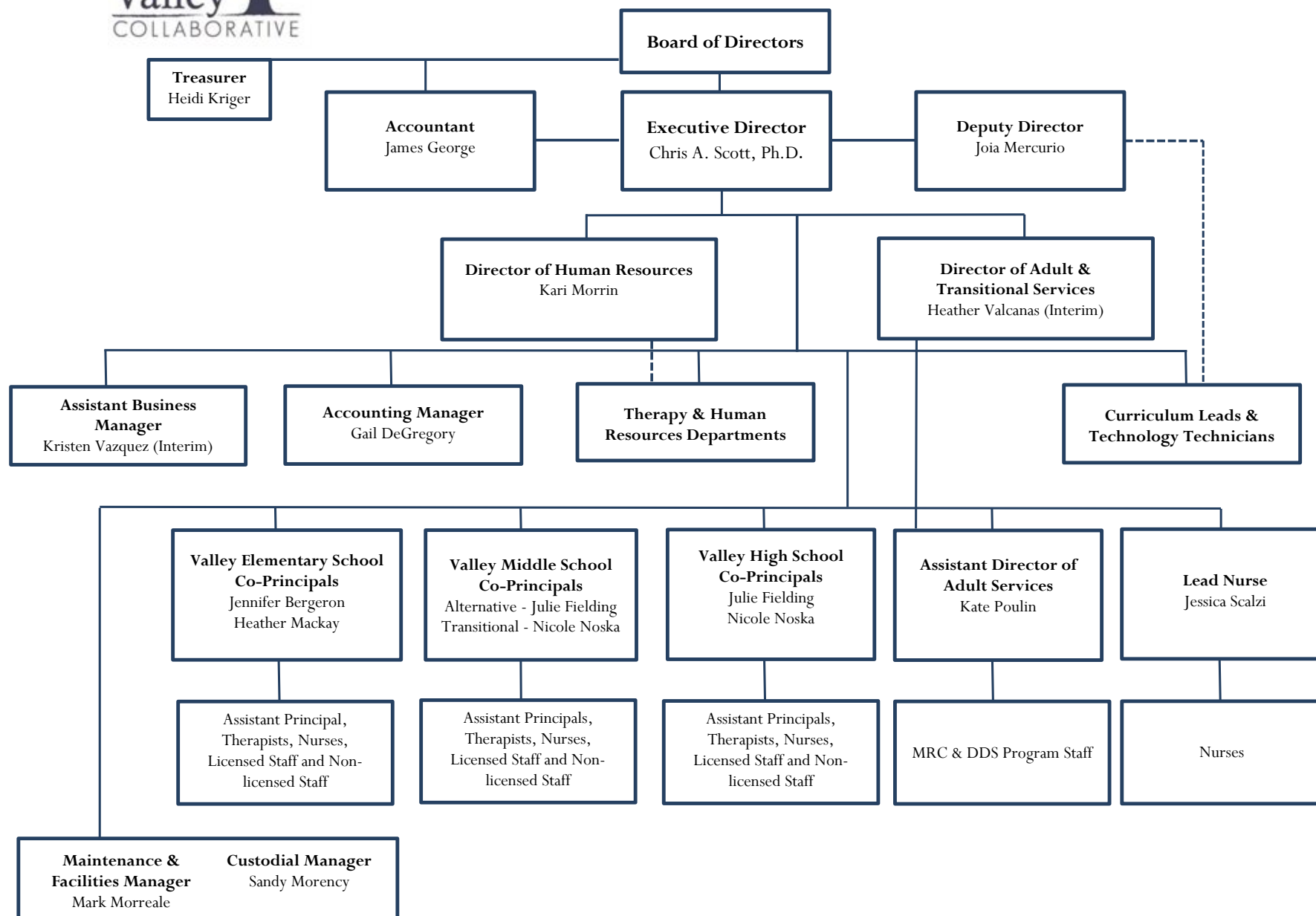
Attachments:

FY'20 Valley Organizational Chart
FY'20 Adult Services Organizational Chart

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

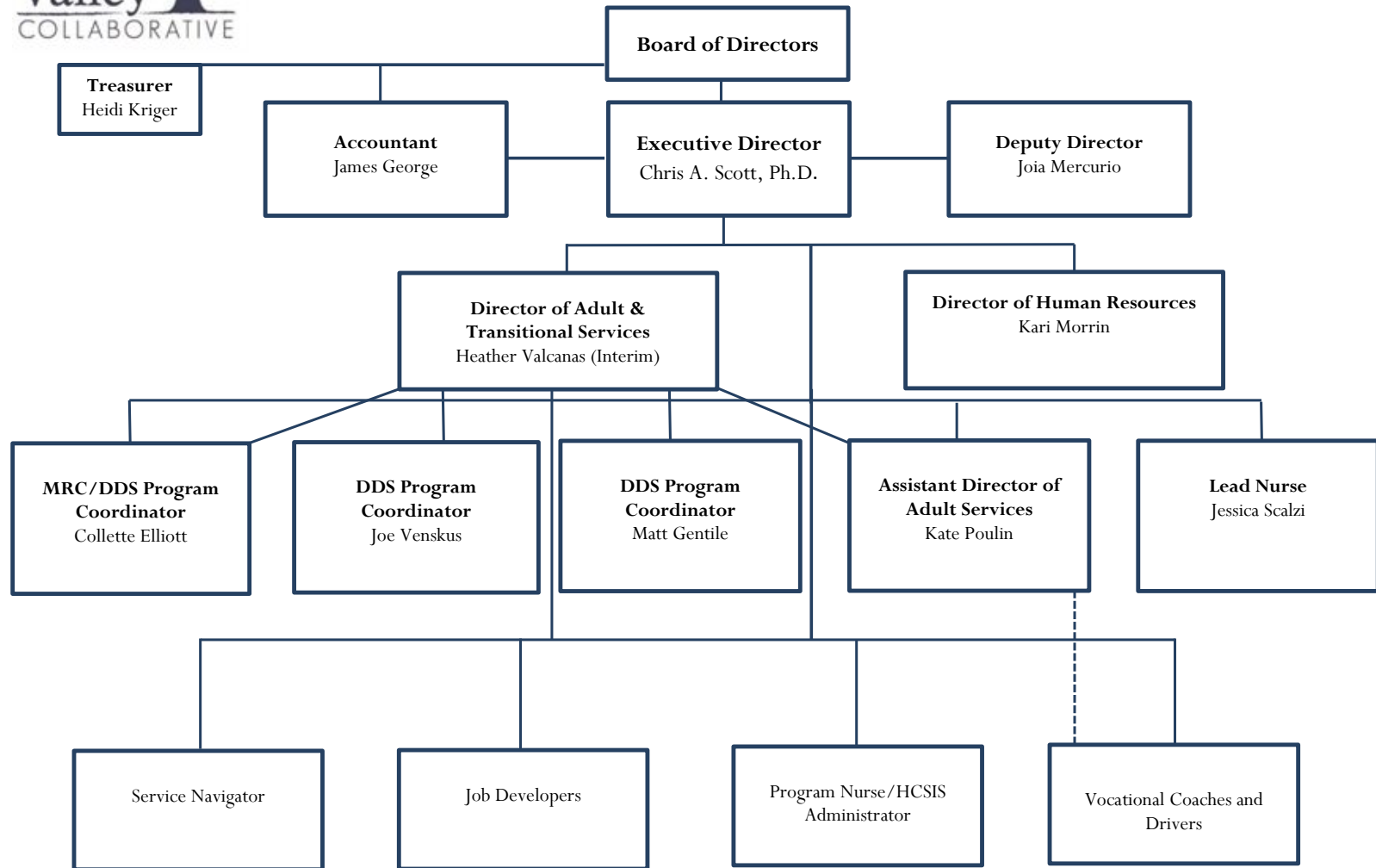


FY'20 Organizational Chart





FY'20 Adult Services Organizational Chart





Central Administration Office

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 19, 2019
Re: Communications – State Agencies

The Massachusetts Office on Disability (MOD), in partnership with Valley's Today and Tomorrow program, hosted a meeting to bring together people with disabilities and local emergency preparedness professionals.

Information on this event is attached.

Required Action:

None

Attachments:

Letter from Evan George, Emergency Preparedness Coordinator
Emergency Preparedness Training Agenda
Workshop Certificate

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Disability

Massachusetts Office on

One Ashburton Place, Room 1305
Boston, MA 02108

Charles D. Baker, Governor
TTY
Karyn E. Polito, Lt. Governor
Evan C. Bjorklund, Interim Director

800-322-2020 voice &
617-727-0965 FAX
617-727-0965 FAX
Web: <http://www.mass.gov/mod>

March 22, 2019

Dear Friend:

The Massachusetts Office on Disability (MOD), in partnership with the *Valley Collaborative* and *The Today and Tomorrow Program*, is hosting a meeting to bring together people with disabilities and local emergency preparedness professionals.

This meeting will be held on **July 19, 2019 from 12:00pm – 2:00pm at 25 Linnell Circle, Billerica, MA 01821**. The purpose of the meeting is to explore how to ensure that people with disabilities have the assistance they need in times of emergency.

- An ice storm leaves the region without electricity.
- Fire in an industrial plant forces evacuation of surrounding communities.
- A train jumps the tracks, releasing a cloud of toxic chemicals.

Communities across the Commonwealth are planning for emergency situations like these, some are natural and others are man-made; some require evacuation while others require sheltering at home.

Members of the disability community will learn about the emergency response resources and procedures within their local communities and the steps that can be taken to personally prepare for emergency situations. **Persons with disabilities will also receive an “Emergency Go Pack” with essential items that might be needed during an emergency. First Responders will receive “Tips for First Responders, 5th edition”.**

If you would like to attend, please **register by filling out the permission slip at the Valley Collaborative by July 17, 2019.**

- If you have questions you can contact Kate Poulin:
- Work: 978.528.7825 or email: kpoulin@valleycollaborative.org

Accommodations will be provided upon request. In order to make requests, please contact Evan George at 617-979-7313, no later than July 3, 2019.

If there are any further questions regarding this meeting, please feel free to contact me.

Sincerely,

Evan George
Emergency Preparedness Coordinator

This project is supported by Grant #2006-GE-T6-0028, awarded by the Department of Homeland Security, Office of Grants and Training, through the Executive Office of Public Safety and Security, Homeland Security Division. Points of view expressed in this document are those of the author and do not necessarily represent the official position of the U.S. Department of Homeland Security or the Office of Grants and Training.



Valley Collaborative

Today & Tomorrow Program

Massachusetts Department of Developmental Disabilities

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

Massachusetts Office on Disability

Emergency Preparedness Training

Friday, July 19, 2019

Welcome: Dr. Chris A. Scott, Executive Director of Valley Collaborative

Introductions: Katherine Poulin, Assistant Director of Adult Services

Presenter:

Mr. Evan George – Emergency Preparedness Coordinator from the Massachusetts Office on Disability

Attendees:

Officer James Ryder – Tewksbury Police Department

Officer Kim O’Keefe – Tewksbury Police Department

Deputy Chief Tom Ferraro – Billerica Fire Department

Lieutenant Tom Larkin – Billerica Fire Department

Emergency Management Director Bill Laurendeau – Billerica Police Department

Emergency Scenarios: learn about the resources and procedures in your local community:

- An ice storm leaves the region without electricity.
- Fire in an industrial plant forces evacuation of surrounding communities.
- A train jumps the tracks, releasing a cloud of toxic chemicals.

Q & A:

Individuals will have the opportunity to ask questions, about what they should do, if an emergency occurs in their local community.

Mr. Evan George to Distribute:

Participants: “Emergency Go Packs” and Certificate of Training for individuals

First Responders: “Tips for First Responders”, 5th Addition for the First Responders



Massachusetts Office on Disability Emergency Preparedness

Congratulations on completing the Emergency Preparedness Workshop
Awarded on: July 19, 2019

Mr. Evan George, Emergency Preparedness Coordinator for the Massachusetts Department on Disability





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: September 19, 2019
Re: Communications – Valley Extra Curricular

The following Valley Extra Curricular highlight is attached for your review:

- Climbing Mt. Chocorua

Required Action:

None

Attachments:

Note from Glen
Photo Collage

From: [Glen Costello](#)
To: [Chris Scott](#)
Cc: [Julie Fielding](#); [Jennifer Fitzgerald](#); [Corey Shepherd](#); [Joia Mercurio](#)
Subject: First Floor Strong
Date: Thursday, August 15, 2019 8:48:21 AM
Attachments: [IMG_1129-COLLAGE.jpg](#)

Just wanted to share some pictures from another great day! Mt. Chocorua is one of the most frequently photographed mountains in the world according to the AMC, so it was pretty neat to provide the opportunity for our students. The kids had a blast, one student was so impressed with the view he started to FaceTime his mom to share the view with her. Thanks again for all your support! Awesome collaboration going on between the middle and high school programs, huge shout out to Corey Shepherd helping out and making this a memorable day for the kids.

Glen Costello
Assistant Principal
STEM Lead
Valley Collaborative
40 Linnell Circle
Billerica MA 01821
978-528-7830





Central Administration Office

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 19, 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

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 19, 2019
Re: Monthly Update from
Jennifer Bergeron, Co-Principal Elementary School
Heather Mackay, Co-Principal Elementary School

September has been an exciting and busy month at the Elementary school. We moved back into our building after a successful Extended School Year Program at the Tyngsboro Middle School. The elementary school has been updated with a new HVAC system and windows, much to the excitement of the staff and students. Our team has worked hard on the building esthetics and we are excited for the community to see the updates to the building.

The teachers have participated in a number of field trips this month that include Parlee Farms, Dream Diner and Max's Golf.

The new school year also brought the addition of Co-Principal, Heather Mackay and Assistant Principal, Amy Murphy to the leadership team. Both individuals have been with Valley for a number of years and bring a wealth of knowledge and expertise to their new roles.

We have started touring new students from a number of districts that include Wilmington, Nashua, Methuen and Everett. IEP and team meetings have begun and we started one new student this month from Chelmsford. Looking forward we are preparing for our Open House on October 2nd, Halloween Dance and fall activities that include a visit from a motivational speaker, Randy Pierce.

Thank you for the continued support.

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



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: September 19, 2019
Re: Monthly Update from
Julie Fielding, Principal Alternative Programming
Valley Middle School and Valley Transitional High School

We've had a very exciting start to the year all around. Behaviors have been a challenge while getting back into the swing of things -and testing new staff-but overall we have some great stuff happening!

Vocational: Our new high school vocational shops have opened: Culinary Arts, Multimedia Communications, Middle School Education, and Landscaping/Home Improvement. Feedback from students and parents has been great. The new program design is that students attend half day academics and half day vocational shops, so far that seems to be working well. This month students will be attending trips to bowling, rock climbing, canoeing, hiking, pottery, the zoo, and Middlesex Community College.

Academic: This year we merged two of our academic programs together to make one larger program due to the profiles of recent students being so similar. Students will be participating in STEAM and life skills to meet their needs. Students will be attending trips to Lawn on D, hiking, the Freedom Trail, Salem MA, Cranberry Bogs, and to Lowell Photography.

Alternative Middle School: Our middle school is already pretty full this year, we are hoping to be able to open the fifth classroom in order to accommodate future referrals. Students are participating in trips this month to hiking, bowling, rock climbing, pottery, and Apple picking.

Glen Costello and Bobby Nimblett will be starting an Outdoor Ed Club for students to be able to participate in across our alternative programming. Dave Illg will be starting up fall sports for students as well.

All of our senior transcripts have been sent out to districts to ensure graduation requirements are being met. The junior transcripts will be going out to districts soon too.

We've hired some great new staff and to increase floorwide collaboration and help support new teachers Bobby, Dave and Glen are meeting with all new teachers Friday mornings for coffee and support with all things alternative education.

Happy 3rd Week!

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 19, 2019
Re: Monthly Update from
Nicole Noska, Principal Transitional Programming
Valley Middle School and Valley Transitional High School

Students and staff returned on September 4th, rejuvenated and full of excitement for a new school year. Of particular interest were the electives. In addition to Art, Music, Outdoor and Physical Education, each of the high school classes now have the opportunity to take Woodshop. The woodshop course will be modified to meet the needs of each individual learner. During the first session, students learned about the various tools, safety procedures, and rules and expectations for the shop. Students are excited to begin working on their first project, a wooden desk organizer!

At the high school level, the Transition Services team has been collecting data to track student production and participation during the work day. Through the use of Google forms, we've created a work site data collection tool that can be used universally. Staff feedback has been positive, largely due to the efficiency of the tool and ease of use. Data collection continues to be at the forefront of transition services as we move to complete transition assessments for all of our students. By the end of the last school year, 70% of School to Work and SVT students had a comprehensive transition assessment. We're looking to complete the remaining assessments in the first half of this school year. In addition to tracking student production and participation, we are using the data from the transition assessments to help better inform our job development and job placement.

The outdoor education program is in full swing with students from the Middle and High School enjoying a nature walk at Friendship Park, a picnic and nature walk at Walden Pond, eagle spotting at Maudslay State Park, and birdwatching along the Parker River.

Fresh from a field trip to the USS Constitution, students from the School to Work class began their annual community service project at Gaining Ground farm. At Gaining Ground, the students cultivate land, harvest crops such as potatoes and greens, wash, weigh and bag produce, and assist with maintenance tasks around the farm. All of the food harvested from Gaining Ground is donated to local meal programs and food pantries, making this the ultimate community service experience.

We are looking forward to a great school year ahead.

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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: September 19, 2019
Re: Monthly Update from
Kate Poulin – Assistant Director of Adult Services

August – September Program Overview:

1. Program Overview:
 - a. Accepted one new individual.
 - b. One individual has left the program due to lack of attendance.
 - c. Received two formal referrals and held five tours.
2. Job Developers:
 - a. Met with Superintendent, Dr. Denise Pigeon at Nashoba Valley Tech, about developing at paid contract site with Valley Collaborative. As a result we are forecasting to have a group of individuals start working there later in September.
 - b. The CBDS program has also started recycling at Quanterix in Billerica.
 - c. Middlesex Sheriff's Department hired two individuals for summer camp counselors competitive employment. They got CPR certified!!
 - d. Sam W. received employee of the month from her independent job at the Outback!!
3. In Career Planning:
 - a. Curriculum Topics:
 - i. Resume Writing
 - ii. Investigative Career Cluster
 - iii. Learning about what kinds of jobs fall under this cluster.
 - b. Post-Secondary Options
 - i. Learning about opportunities at MCC (See Tour Below)
 - c. Job Exploration/Informational Interviews:
 - i. US. Coast Guard- Newburyport, MA
 1. Join us as we honor the men and women who serve our City at the U.S. Coast Guard Station on the Merrimack River. The station was open to the public and they were giving tours of their facilities and providing life saving techniques while discussing the hazards of the Merrimack River entrance.
 - ii. Concord Museum- Concord, MA (Free Friday)
 1. Observing jobs at this location

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- iii. The Gore Place-Waltham, MA (Free Friday)
 - 1. *Gore Place* is a mansion built in 1806 and designed by Rebecca Gore in the Federalist style. This museum and working farm is located on 50 acres in Waltham & Watertown, MA
 - 2. Observing jobs at this location
- iv. Ipswich Wildlife Sanctuary- Ipswich, MA
 - 1. Observing jobs at this location
- v. Cintas- Chelmsford, MA
 - 1. Guided Tour
 - 2. Informational Interview- learning about different jobs at this location.
- vi. Middlesex Community College –Lowell, MA (Aug 23, 2019)
 - 1. Individuals signed up for this tour
 - 2. Agenda
 - a. 9:30am – Group arrival
 - b. 9:45am – General Admissions information session (Alison Handy)
 - c. 10:15am – Disability Support services presentation (Glaisma Perez Silva)
 - d. 10:45am – Campus tour (Alison Handy)
 - e. 11:30am – Conclude tour
 - f. 11:30am – 12:00 – Group departs Lowell campus
- vii. JFK Library
 - 1. Guided Tour, including areas public are not typically permitted.
 - 2. Informational Interview.
- viii. Winchester Hospital- Winchester, MA
 - 1. Drop in Tuesday Hiring Event
- d. Curriculum Topics:
 - i. Interview Skills Packet
 - 1. Discussion Packet from Snap Curriculum
 - 2. Tell Me About Yourself
 - 3. Interview Topics/Mock Interview
 - 4. Interview Dos and Don'ts
 - 5. Checklist: Before Your Interview
 - ii. Artistic Career Cluster
 - 1. Learning about jobs that fall under this career cluster
- e. Job Exploration/Informational Interviews:
 - i. Lahey Hospital
 - 1. Hiring Event- Food Services
 - 2. Dressed up for Interview
 - 3. Brought Resumes
 - 4. Met with HR
 - 5. Job Developer went along to facilitate
- 4. In Community Based Day Support (CBDS):
 - a. Curriculum Topics:
 - i. Budgeting:
 - 1. Learning how to purchase items by completing worksheets and applying out it out in the community when applicable.

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- ii. Hygiene:
 - 1. Oral: Brushing teeth, flossing, going to the dentist.
 - 2. Showering, Bathing, Shaving, how to use deodorant.
- iii. Cooking:
 - 1. Breakfast meals
 - 2. Peach Cobbler
- iv. Music Classes with:
 - 1. Vlad at 40 Linnell Circle
 - 2. Andrew at Music Academy of Chelmsford
- v. Ceramics with Diane
- b. Community Service:
 - i. Merrimack Valley Food Bank
 - ii. Recycling throughout business park
 - iii. Donating clothes to Catie's closet
- c. Community Outings:
 - i. Haverhill Firefighter Museum to see a 9/11 exhibit
 - ii. Abilities Expo in Boston (highlighting new and upcoming technology and services for adults with disabilities)
 - iii. BATV recording of a show about sound and musical emersion therapy
 - iv. Scottish Rite Masonic Museum and Library
 - v. Audubon Society Ipswich River Wildlife Sanctuary
 - vi. Butterfly Observatory
 - vii. John F. Kennedy Museum
 - viii. Fort Devens Military Museum
 - ix. Discovery Museum
 - x. Laughter Yoga at the Tewksbury Library
 - xi. A hip hop dance class "Trend in motion" Boarding House Park

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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: September 19, 2019
Re: Communications – Community/Staff Feedback

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

- Email from Lowell Special Education Evaluation Team Chairperson
- Staff Communication
- Sean Curran's 30th Anniversary at Valley

Required Action:

None

Attachments:

Email from Lowell Special Education Evaluation Team Chairperson
Staff Communication
Memo and Photos from Sean Curran's 30th Anniversary at Valley

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From: [Bousios, Athanasia](#)
To: [Chris Scott](#)
Cc: [Nicole Noska](#); [Jennifer Bergeron](#)
Subject: Re: My position in Lowell
Date: Monday, July 15, 2019 8:42:39 AM

Hello,

Thank you so much for your kind words! I truly appreciate and value all of my relationships with the Valley staff and the work that we have been able to complete together.

I have to say, that Valley has been my favorite school to work with over the last few years and I will miss everyone very much! I value Valley's work ethic, commitment to ensuring student progress, collaboration and clear communication with Districts!

I am sure our paths will cross again! I wish you a great school year ahead!

Thank you,

Soula

Athanasia (Soula) Bousios
Out Of District
Evaluation Team Chairperson

Lowell Public Schools
Special Education Department
155 Merrimack Street
Lowell, MA 01852

Phone: (978) 674-2091
Fax: (978) 275-6361

On Jul 10, 2019, at 3:14 PM, Chris Scott <cscott@valleycollaborative.org> wrote:

Hi Soula,

We hope to continue working with you in your new role. Thank you for everything you have done to support Valley and your students here. We wish you all the best in your new role. They are so fortunate to have you.

Best wishes,
Chris

July 9, 2019

Katherine Poulin

Dear Doctor Scott,

Thank you for the new opportunity to serve as the Assistant Director of Adult Services at Valley Collaborative. This is an exciting role where I know I will succeed. I feel honored that you believe in me and are mentoring me at this point in my career. I am looking forward to being on your Leadership Team, learning from other members, and offering my best advice. We will make this a great year together!

Sincerely yours, Kate



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: September 19, 2019
Re: Sean Curran's 30th Anniversary at Valley

Sean Curran's 30th Anniversary at Valley was on July 14, 2019.

To celebrate this milestone, Valley, with the help of the individuals, surprised Sean with a celebration on Thursday, July 18th.

Required Action:

None

Attachments:

Anniversary Photos





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: September 19, 2019
Re: Communications – Parent Communications

The following Parent Communications items are attached for your review:

- Elementary School Welcome Back Letter
- Elementary School Open House Memo

Required Action:

None

Attachments:

Elementary School Welcome Back Letter
Elementary School Open House Memo

From: [Chris Scott](#)
To: [Jennifer Bergeron](#)
Cc: [Joia Mercurio](#); [Kari Morrin](#); [Donna Suarez](#)
Subject: Re: Draft memo
Date: Thursday, August 15, 2019 8:20:55 PM

Good Evening Jennifer,
You do me- Valley proud.
This is an excellent letter- I love the “voice” and tone- I wouldn’t change a thing.
I will include this under communication in the next Board book.
Again,
Many, many THANKS!
Chris

On Aug 15, 2019, at 8:05 PM, Jennifer Bergeron <jbergeron@valleycollaborative.org> wrote:

Good evening Dr Scott,
Below is the draft correspondence I would have with families after our walk thru next week to solidify our plan.
Please let me know any adjustments you would like made.

Hello Valley Elementary Families,

Welcome back! We are excited for the start of the 2019-2020 school year. We want to thank you for your support during the extended school year program and the relocation change. The six weeks were very successful and our students were able to enjoy many academic activities, field trips and new experiences. We want to thank the Tyngsboro School Department for being such gracious hosts for our summer programming.

There are some new and exciting changes awaiting our students when school starts. Our parents will be sure to recognize the new appointed administration at Valley Elementary. First, I would like to welcome Heather Mackay as the new Co-Principal of our Elementary School. Heather has worked as a teacher for eight years at Valley. Secondly, Amy Murphy has been appointed the Assistant Principal. Amy began teaching at Valley over ten years ago and has served most recently as a BCBA for the school for six years. I am looking forward to this new administrative model, I feel it will benefit our student population and our families.

The building improvement updates that occurred over the extended school year are almost complete. The new HVAC system is finished and operational. There is a project delay in replacing the windows for one wing of the school. This will not delay the start of school but will impact five classrooms that will be relocated throughout the building for this period of time. The program, school start up procedures and daily routine will not be affected. We have worked hard to minimize disruption during this final stage of renovation. We expect to have

this project completed by the end of September. We appreciate your patience and understanding.

If you have any questions or concerns regarding these updates, do not hesitate to reach out.

Sincerely yours,

Jennifer Bergeron, M.Ed
Principal
Valley Collaborative
Elementary School
135 Coburn Rd
Tyngsborough, MA 01879
(978) 528-7843





Elementary School

135 Coburn Road, Tyngsborough, MA 01879 * Tel: (978)-528-7843 Fax: (978)-528-7845 * <http://www.valleycollaborative.org>

Open House Invitation

Please join us for an Open House on October 2th from 5:30-6:30. During this time, you will tour students classrooms and see their schedules, as well as view our curriculum offerings and new enhancements at the Elementary School in the cafeteria during the curriculum fair. During classroom time, there will be a sign up for teacher conferences that will be offered in November. We ask that this be parents only so that you can focus on the classroom and ask any questions you have. At this time we are not providing child care. We look forward to seeing you there.

WHEN:

Wednesday, October 2nd 5:30-6:30

WHERE:

135 Coburn Road
Tyngsborough, MA

MORE INFORMATION:

Please RSVP by September 27th, using the form below or by calling 978-528-7843.

RSVP for Open House on October 2nd from 5:30-6:30

Student Name: _____

Parent/Guardian Name: _____

Yes: _____ No: _____

Number of attendees: _____



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: September 19, 2019
Re: Communications – Resignation Letters

The following Resignation Letters are attached for your review:

- Annie Willis
- Laura McGloine

Required Action:

None

Attachments:

Resignation Letters

From: [Annie Willis](#)
To: [Chris Scott](#)
Subject: Resignation
Date: Wednesday, July 10, 2019 9:07:27 AM

Dear Dr. Scott

I wanted to thank you and the leadership team for an excellent seven years. I appreciate all that I have learned and experienced here at Valley. After much debate I have decided to resign from my position as principal here and take a position as Chief Education Officer at The Guild for Human Services. My last day will be August 16th, 2019. I am happy to work with co-principal Jennifer to develop a transition plan for the elementary school. I want to be sure the school is set up for success in the upcoming school year. I will miss the students, staff and families and I wish the collaborative much success in the future.

Best,

Annie Willis
Principal
Elementary School
135 Coburn Rd
Tyngsborough, MA 01879
(978) 528-7843

July 15, 2019

Dear Dr. Scott,

It is with great sadness that I write this letter of resignation for my duties as Speech-Language Pathologist at Valley Collaborative. I want to personally thank you for leading the Collaborative to provide such high levels of individualized education and care for our students. Being a part of the Valley family over the past nine years has provided me with a supportive learning environment in which I truly honed my passion, while creating lifelong friendships amongst the best of colleagues. I have had opportunities to expand and specialize my within the AAC scope of practice and take on new challenges each year because of the fantastic workplace culture you have been able to support. I will always speak highly of our leadership team, the educational and support staff team's dedication, and remember my time at Valley very fondly.

That being said, with my growing family and shift in priorities, I am excited to take a new opportunity working closer to home with a shorter day and school year to spend more time with my daughter, Gretta. My official last day with Valley will be on Thursday August 15th, 2019 as I complete my .6 summer contract.

Again, I thank you for your commitment to make Valley a better place for all and for empowering our students and adults to live meaningful lives by the amazing opportunities they are given here. I hope our paths cross again in the future!

Yours truly,

A handwritten signature in cursive script that reads "Laura McGloine".

Laura McGloine



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: September 19, 2019
Re: Communications – MOEC Treasurer’s Report

Valley’s volunteer professional contribution to MOEC is attached for your review:

- MOEC Treasurer’s Memo
- MOEC Treasurer’s Report

Required Action:

None

Attachments:

MOEC Treasurer’s Memo
MOEC Treasurer’s Report



Central Administration Office

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MEMORANDUM

To: MOEC Board of Directors
From: Dr. Chris A. Scott, Ph.D., Valley Collaborative Executive Director - MOEC Treasurer
Mr. James George, CPA, CVA, JD, Accountant
Ms. Gail DeGregory, Accounting Manager
Date: September 9, 2019
Re: Treasurer's Report
Year End Financial Update

We are pleased to report that the Massachusetts Organization of Educational Collaboratives (MOEC) had a strong operating year in 2019. This memo highlights some of the important items in the financial statements we wanted to highlight for the year.

- MOEC's revenues exceeded budget by \$10,990 for the year ending June 30, 2019, excluding the pass through AESA fees. This was done by exceeding our budgeted grant income by \$5,000 as well as more activity fees than budgeted for in FY 2019.
- MOEC's activity fees were down this year relative to the prior year, but due to lower cost in running these programs, the activities were cash positive. In the previous year, the activities cost exceeded revenue by almost \$6,000. This year's activity fees yielded over \$5,000 in income, a net gain of \$11,000 year over year.
- Many expense items came in under budget for FY 2019. Executive director expenses were below budget by over \$10,000 and were over \$8,000 less than the prior year. Office expenses were \$1,000 under budget. Administrative expenses were almost \$2,000 under budget.
- Because of the cost reductions and the revenue exceeding budget, the operating revenue for FY 2019 was \$28,816 which was \$27,615 above budget and \$30,789 more than the prior year.

In order to prepare the financial statements for MOEC at year end, the following adjustments were made:

- The QuickBooks online setup was done incorrectly as it had the year end as December 31st. James George walked Emily through making the change in the QuickBooks online software and the QuickBooks now properly has June 30th as the year end of MOEC.
- The prior year's revenue in QuickBooks was not being recorded correctly. Each year, MOEC bills its member in advance for dues for the following year. (In May of 2019 MOEC bills for FY 2020's dues). The revenue recognition was corrected so that the revenue is recorded in the correct period.
- The prior year's balances did not agree to the prior year's review report submitted to the state. We corrected the balances to make them agree to the prior year statements so that the beginning balances of FY 2019 were correct.
- Old cash items were corrected in the Santander bank so that the cash balance at year end was correct

Attachments:

Budget vs Actual FY 2019
Statement of Activity
Statement of Financial Position

Massachusetts Organization of Educational Collaboratives

BUDGET VS. ACTUALS: FY_2018_2019 - FY19 P&L

July 2018 - June 2019

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Revenue				
4000 Revenue from Dues				
4010 MOEC Dues	162,500.00	162,500.00	0.00	100.00 %
4020 AESA Dues/Fees	12,915.00		12,915.00	
Total 4000 Revenue from Dues	175,415.00	162,500.00	12,915.00	107.95 %
4030 Surplus Revenue (Budgetary Use Only)		20,000.00	-20,000.00	
4100 Revenue from Activity Fees	8,990.00	3,000.00	5,990.00	299.67 %
4200 Contract/Grant Income	25,000.00		25,000.00	
Total Revenue	\$209,405.00	\$185,500.00	\$23,905.00	112.89 %
GROSS PROFIT	\$209,405.00	\$185,500.00	\$23,905.00	112.89 %
Expenditures				
6000 Executive Director Expenses				
6010 Salary	82,500.00	90,000.00	-7,500.00	91.67 %
6020 Mileage	2,000.00	2,000.00	0.00	100.00 %
6030 Conference Travel	6,112.75	8,000.00	-1,887.25	76.41 %
6040 Dues and Subscriptions	669.00	1,100.00	-431.00	60.82 %
6050 Other	365.28	500.00	-134.72	73.06 %
6060 Awards/Gifts	196.73	300.00	-103.27	65.58 %
6070 Sponsorships/Silent Auction	100.00	300.00	-200.00	33.33 %
Total 6000 Executive Director Expenses	91,943.76	102,200.00	-10,256.24	89.96 %
7000 Administrative Expenses				
7010 Administrative Payroll	17,640.00	17,500.00	140.00	100.80 %
7020 Training/PD	567.73		567.73	
7030 Office Expenses	0.00	7,100.00	-7,100.00	0.00 %
7032 Postage	36.31		36.31	
7034 Comp/phone/Internet Expenses	2,321.43		2,321.43	
7036 Office Supplies	3,708.68		3,708.68	
Total 7030 Office Expenses	6,066.42	7,100.00	-1,033.58	85.44 %
7040 Website/Database		600.00	-600.00	
7050 Printing and Reproduction	3,308.49	4,200.00	-891.51	78.77 %
Total 7000 Administrative Expenses	27,582.64	29,400.00	-1,817.36	93.82 %
8000 Operational Expenses				
8010 Activity Expenses				
8012 Food/Beverages	1,833.67	3,000.00	-1,166.33	61.12 %
8014 Speaker Fee	1,500.00	2,500.00	-1,000.00	60.00 %
Total 8010 Activity Expenses	3,333.67	5,500.00	-2,166.33	60.61 %
8020 Contract/Grant Expense				
8021 Membership Projects	7,000.00	8,700.00	-1,700.00	80.46 %
Total 8020 Contract/Grant Expense	7,000.00	8,700.00	-1,700.00	80.46 %
8030 AESA Dues to AESA	12,915.00		12,915.00	
8040 Auditor/Legal Expenses				

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
8042 Auditor and Filing Fees	3,840.00	3,300.00	540.00	116.36 %
8044 Legal Fees	1,078.00	1,000.00	78.00	107.80 %
Total 8040 Auditor/Legal Expenses	4,918.00	4,300.00	618.00	114.37 %
8050 Legislative Expenses				
8052 Legislative Fees	153.50		153.50	
8054 Legislative Liaison Fees	30,000.00	30,000.00	0.00	100.00 %
Total 8050 Legislative Expenses	30,153.50	30,000.00	153.50	100.51 %
8060 Office Rent	3,000.00	4,200.00	-1,200.00	71.43 %
8070 Bank Fees	95.67		95.67	
Total 8000 Operational Expenses	61,415.84	52,700.00	8,715.84	116.54 %
Total Expenditures	\$180,942.24	\$184,300.00	\$ -3,357.76	98.18 %
NET OPERATING REVENUE	\$28,462.76	\$1,200.00	\$27,262.76	2,371.90 %
Other Revenue				
4300 Misc Income	297.21		297.21	
4400 Interest Income	55.67		55.67	
Total Other Revenue	\$352.88	\$0.00	\$352.88	0.00%
NET OTHER REVENUE	\$352.88	\$0.00	\$352.88	0.00%
NET REVENUE	\$28,815.64	\$1,200.00	\$27,615.64	2,401.30 %

Massachusetts Organization of Educational Collaboratives

STATEMENT OF ACTIVITY

July 2018 - June 2019

	TOTAL		CHANGE
	JUL 2018 - JUN 2019	JUL 2017 - JUN 2018 (PP)	
Revenue			
4000 Revenue from Dues			
4010 MOEC Dues	162,500.00	162,500.00	0.00
4020 AESA Dues/Fees	12,915.00	11,880.00	1,035.00
Total 4000 Revenue from Dues	175,415.00	174,380.00	1,035.00
4100 Revenue from Activity Fees	8,990.00	14,590.00	-5,600.00
4200 Contract/Grant Income	25,000.00		25,000.00
4210 Regional SPED Mtgs 17/18		25,000.00	-25,000.00
Total 4200 Contract/Grant Income	25,000.00	25,000.00	0.00
Total Revenue	\$209,405.00	\$213,970.00	\$ -4,565.00
GROSS PROFIT	\$209,405.00	\$213,970.00	\$ -4,565.00
Expenditures			
6000 Executive Director Expenses			
6010 Salary	82,500.00	89,763.54	-7,263.54
6020 Mileage	2,000.00	2,000.00	0.00
6030 Conference Travel	6,112.75	7,677.67	-1,564.92
6040 Dues and Subscriptions	669.00	473.72	195.28
6050 Other	365.28	136.13	229.15
6060 Awards/Gifts	196.73	417.38	-220.65
6070 Sponsorships/Silent Auction	100.00	100.00	0.00
Total 6000 Executive Director Expenses	91,943.76	100,568.44	-8,624.68
7000 Administrative Expenses			
7010 Administrative Payroll	17,640.00	12,740.25	4,899.75
7020 Training/PD	567.73		567.73
7030 Office Expenses	0.00	2,208.28	-2,208.28
7032 Postage	36.31		36.31
7034 Comp/phone/Internet Expenses	2,321.43		2,321.43
7036 Office Supplies	3,708.68		3,708.68
Total 7030 Office Expenses	6,066.42	2,208.28	3,858.14
7040 Website/Database		6,375.00	-6,375.00
7050 Printing and Reproduction	3,308.49	3,642.02	-333.53
Total 7000 Administrative Expenses	27,582.64	24,965.55	2,617.09
775 - Educ Licensure Work (deleted)		846.65	-846.65
8000 Operational Expenses			
8010 Activity Expenses			
8012 Food/Beverages	1,833.67	2,797.54	-963.87
8014 Speaker Fee	1,500.00	17,738.60	-16,238.60
Total 8010 Activity Expenses	3,333.67	20,536.14	-17,202.47
8020 Contract/Grant Expense			
8021 Membership Projects	7,000.00		7,000.00
8022 Regional SPED Mtgs		22,500.00	-22,500.00

	TOTAL		
	JUL 2018 - JUN 2019	JUL 2017 - JUN 2018 (PP)	CHANGE
Total 8020 Contract/Grant Expense	7,000.00	22,500.00	-15,500.00
8030 AESA Dues to AESA	12,915.00	11,880.00	1,035.00
8040 Auditor/Legal Expenses			
8042 Auditor and Filing Fees	3,840.00	3,200.00	640.00
8044 Legal Fees	1,078.00		1,078.00
Total 8040 Auditor/Legal Expenses	4,918.00	3,200.00	1,718.00
8050 Legislative Expenses			
8052 Legislative Fees	153.50	127.50	26.00
8054 Legislative Liaison Fees	30,000.00	27,500.00	2,500.00
Total 8050 Legislative Expenses	30,153.50	27,627.50	2,526.00
8060 Office Rent	3,000.00	4,160.00	-1,160.00
8070 Bank Fees	95.67		95.67
Total 8000 Operational Expenses	61,415.84	89,903.64	-28,487.80
Total Expenditures	\$180,942.24	\$216,284.28	\$ -35,342.04
NET OPERATING REVENUE	\$28,462.76	\$ -2,314.28	\$30,777.04
Other Revenue			
4300 Misc Income	297.21	300.00	-2.79
4400 Interest Income	55.67	41.39	14.28
Total Other Revenue	\$352.88	\$341.39	\$11.49
NET OTHER REVENUE	\$352.88	\$341.39	\$11.49
NET REVENUE	\$28,815.64	\$ -1,972.89	\$30,788.53

Massachusetts Organization of Educational Collaboratives

STATEMENT OF FINANCIAL POSITION

As of June 30, 2019

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
1000 Santander Checking	59,202.35
1010 Santander Money Market	47,847.41
1020 Enterprise	5,377.08
Total Bank Accounts	\$112,426.84
Accounts Receivable	
1200 Accounts Receivable	175,700.00
Total Accounts Receivable	\$175,700.00
Other Current Assets	
1210 Other Accounts Receivable	-13,390.00
Total Other Current Assets	\$ -13,390.00
Total Current Assets	\$274,736.84
Fixed Assets	
1500 Equipment	1,249.00
1510 A/D -- Equipment	-1,249.00
Total Fixed Assets	\$0.00
TOTAL ASSETS	\$274,736.84
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
2300 Accrued Liabilities	3,298.08
2400 MOEC Dues (Pre-paid)	166,750.00
Total Other Current Liabilities	\$170,048.08
Total Current Liabilities	\$170,048.08
Total Liabilities	\$170,048.08
Equity	
3000 Retained Earnings	41,769.49
3020 Net Assests	
3022 Unrestricted Net Assets	34,103.63
Total 3020 Net Assests	\$34,103.63
Net Revenue	28,815.64
Total Equity	\$104,688.76
TOTAL LIABILITIES AND EQUITY	\$274,736.84