

**Valley Collaborative  
Board of Directors Meeting  
25 Linnell Circle, Billerica, Massachusetts  
Thursday, April 29, 2021 ▪ 10:00 a.m.**

**Action Required**

- I. Approval of Minutes
  - a. Board of Directors Meeting, General Session Minutes: January 28, 2021
- II. Financial Update
  - b. FY'21 Update
  - c. Treasurer's Reports
  - d. PARS Statements
- III. Valley Collaborative Lease Agreements

**No Action Required**

- IV. Member Districts Hiring Valley Staff – During School Year
  - V. School Safety Committee Update
  - VI. COVID-19 Update
  - VII. Communications
- State Agencies
- e. DESE FY'20 Annual Report Approval Letter
  - f. DESE FY'20 Annual Independent Audit Report Approval Letter
  - g. Email from Jarrod Douglass, DDS Human Services Coordinator
- MOEC Update
- h. MOEC Board Meeting Agenda – March 8, 2021
  - i. MOEC Finance Committee
  - j. MOEC Ethics Committee
  - k. MOEC By-Laws and Policy Committee
- Community and Staff
- l. Email from Adam McCusker, Game Time Sports and Fitness Owner
  - m. February 2021 Elementary School Monthly Newsletter
  - n. Black History Month Lean On Me Video



## Central Administration Office

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

### MEMORANDUM

To: Valley Collaborative Board of Directors  
From: Dr. Chris A. Scott, Executive Director  
Date: April 29, 2021  
Re: Approval of Minutes

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Attached please find the following minutes:

- a. Board of Directors Meeting, General Session Minutes: January 28, 2021

### Required Action:

Vote to approve the minutes:

- a. Board of Directors Meeting, General Session Minutes: January 28, 2021

### Attachments:

Board of Directors Meeting, General Session Minutes: January 28, 2021

**Valley Collaborative Board of Directors  
General Session Meeting Minutes  
January 28, 2021  
10:01 a.m. – 10:52 a.m.  
25 Linnell Circle, Billerica, MA**

**Board Members Present:** Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan, Dr. Denise Pigeon

**Board Members Absent:** Mr. Christopher Malone, Dr. Laura Chesson

**Collaborative Representatives Present:** Dr. Chris Scott, Executive Director; Mr. James George, Collaborative Accountant; Ms. Heidi Kriger, Treasurer

**Also Present:** Thomas Lent, Marathas Barrow Weatherhead Lent LLP

**Call to Order: Mr. Timothy Piwowar, Chairman, convened the Collaborative Board Meeting at 10:01 a.m.**

Mr. Piwowar welcomed all in attendance and stated for the record that the meeting is being held remotely via Zoom due to the ongoing restrictions and limitations related to COVID-19.

**Approval of Minutes**

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

On a motion made by Dr. Michael Flanagan and seconded by Dr. Denise Pigeon, a quorum of voters being present, it was voted by roll call vote:

**VOTED: To approve the General Session Meeting Minutes for the Board of Directors dated December 3, 2020.**

The vote was 4-0-2. Yes: Dr. Michael Flanagan, Mr. Everett Olsen, Dr. Jay Lang, Dr. Denise Pigeon. Abstained: Mr. Timothy Piwowar, Mr. Steven Stone

**Financial Update**

**Fiscal Year 2021 Budget Update**

Dr. Scott presented to the Board an update regarding the 2020-2021 budget and Collaborative expenses and revenue. The Collaborative projects a reduction in revenue and expenses. Tuition revenue is projected to be down 9% due to lower enrollment due to Covid-19 than originally planned. State contract revenue is down 20%-25% due to a reduction of units. Dr. Scott directed the Board to the memo contained within the Board materials that explained the nature of other

revenue reductions. Due to the decrease in revenue, Dr. Scott explained the numerous cost cutting measures undertaken by the Collaborative, as summarized in the memo within the Board binder. She did explain that the Collaborative does seek additional funds in capital expenses related to technology expenses and needs. The Collaborative seeks a budget amendment. The Board inquired whether enough monies were available for utilities and PPE costs, and whether the Collaborative anticipated funds being returned to member districts at the close of the fiscal year. Dr. Scott explained that the budget remained conservative and that the Collaborative was in a solid financial position with respect to costs, including those related to Covid-19. Dr. Scott and the Board discussed the surplus fund issues and the formula utilized under state regulations relative to collaboratives.

[Mr. Brad Morgan had joined the meeting at 10:05 a.m.]

On a motion made by Mr. Steven Stone and seconded by Mr. Everett Olsen, a quorum of voters being present, it was voted by roll call vote:

**VOTED: That the Board of Directors amends the FY2021 Operating Budget, as presented and recommended by the Executive Director.**

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Denise Pigeon, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan

#### Treasurer's Report

Ms. Heidi Kriger, the Collaborative Treasurer, provided the Board with her report which covered the months through December 2020. Ms. Kriger provided a verbal summary of her report, including available balances, transfers, withdrawals, interest income and ending balances. She also reviewed the OPEB Trust financial information and balances and PARS statements. A written summary report was contained within the Board materials. Ms. Kriger noted a few errors within her written summary reports, which she will fix for the reports to be included within the Collaborative files. 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, with amendments as noted by Ms. Kriger, it was voted by roll call vote:

**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 and maintained at the Collaborative.**

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan, Dr. Denise Pigeon

**Fiscal Year 2022 Budget**

Dr. Scott reviewed with the Board the proposed budget for fiscal year 2022, which had been reviewed and discussed previously by the Board at its prior meetings. She again reviewed with the Board the Fiscal Year 2022 Budget Draft Presentation Memo, a copy of which was contained within the Board materials. Mr. Timothy Piwowar asked if there were any further questions or comments by the Board regarding the proposed budget for fiscal year 2022. There was none. Mr. Piwowar asked for a motion relating to the proposed budget.

On a motion made by Mr. Brad Morgan and seconded by Mr. Steven Stone, a quorum being present, it was voted by roll call vote:

**VOTED: That the Board of Directors approves the Fiscal Year 2022 Budget, including an Operating Expense Budget for the Collaborative in the amount of \$19,153,912 as presented and recommended by the Executive Director; and requests that the Treasurer certify and transmit the budget for Fiscal Year 2022 to each member district by no later than February 1, 2021.**

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan, Dr. Denise Pigeon

On a motion made by Mr. Steven Stone and seconded by Mr. Everett Olsen, a quorum being present, it was voted:

**VOTED: That the Board of Directors accepts and approves the tuition rates and fees-for-services for member districts for Fiscal Year 2022 as presented; and requests that the Treasurer certify and transmit the tuition rates and fees-for-services for Fiscal Year 2022 to each member district by no later than February 1, 2021.**

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan, Dr. Denise Pigeon

On a motion made by Mr. Steven Stone and seconded by Dr. Michael Flanagan, a quorum being present, it was voted by roll call vote:

**VOTED: That the Board of Directors accepts and approves the assessment of surcharges on tuition rates and fees-for-services on non-member districts based on each student enrolled from a non-member district for Fiscal Year 2022 as presented and recommended by the Executive Director; and authorizes the Executive Director to publish the non-member district tuition rates and fees-for services for Fiscal Year 2022.**

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan, Dr. Denise Pigeon

### **Academic Calendars**

Dr. Scott reviewed the proposed 2021-2022 School Year calendar.

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

**VOTED: That the Board of Directors approves the academic calendar and the Board meeting dates for the 2021-2022 School Year as presented, and authorizes the Executive Director to post such dates on the Collaborative website.**

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan, Dr. Denise Pigeon

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

**VOTED: That the Board of Directors approves the amendment of the 2020-2021 academic calendar as presented to incorporate the Juneteenth state holiday.**

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan, Dr. Denise Pigeon

### **Covid-19 Update**

Dr. Scott and Lead Nurse Jessica Scalzi provided the Board with a Covid-19 update as to the Collaborative, including vaccinations and positive cases and ongoing efforts within the Collaborative to address related issues. The Board expressed its appreciation for the effort and attention to the Covid-19 issues. There was no further discussion.

### **Communications**

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

On a motion made by Mr. Steven Stone and seconded by Mr. Everett Olsen, a quorum of voters being present, it was voted by roll call vote:

**VOTED: To adjourn the Board meeting.**

The vote was 7-0. Yes: Mr. Timothy Piwowar, Dr. Michael Flanagan, Mr. Steven Stone, Mr. Everett Olsen, Dr. Jay Lang, Mr. Brad Morgan, Dr. Denise Pigeon

**Mr. Timothy Piwowar adjourned the Collaborative Board Meeting at 10:52 a.m.**

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

- School Year 2020-2021 Electronic Board Binder for Board Meeting, January 28, 2021

Respectfully Submitted,

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Mr. Timothy Piwowar, Chairman

Dated: \_\_\_\_\_



## Central Administration Office

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

### MEMORANDUM

To: Valley Collaborative Board of Directors  
From: Dr. Chris A. Scott, Ph.D. Executive Director  
James George, CPA, CVA, JD, Business Manager/Accountant  
Date: April 29, 2021  
Re: Third Quarter FY'21 Financial Update

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As of March 31, 2021 (148 of 200 days – 74%) FY'21 as of March 2021 closed favorable with revenues on target at 75.61% and expenses at 69.68%. Enrollment at the end of March was 272 students (this is less than the enrollment last February which had 289 enrolled) in the DESE programs. Consistent with the end of the March of previous years, many of our programs are now showing “in-the-black”. Historically the fourth quarter is the strongest, and this year does not appear to be an exception. Our revenue is expected to be strong the next quarter as our daily rate for tuition is higher due to it being divided by 170 days versus the traditional 180 days.

Our adult program revenue is trending higher than was budgeted for due to additional funding above our earlier estimates.

From an expense standpoint, we are trending slightly below our budgeted amount. We believe that by the end of the year, we should be at or less than budgeted expenditures. With an increase in revenue and our expenditures projected to be at budget, we believe that we will need to return money back to our member districts.

Attached is the 25% surplus calculation based on these projections. I would propose the following:

- Vote to return \$1,000,000 back to the member districts.

That will leave \$800K - \$1.1 million left that we may have in surplus that could be returned in the next board meeting once we are closer to year end and our year end projection becomes more precise.

#### **Attachments:**

Cumulative Surplus Calculation – FY 21 as of March 31, 2021  
Profit and Loss by Program March 31, 2021  
Balance Sheet March 31, 2021  
Profit and Loss March 31, 2021  
Treasurer's Reports  
PARS Statements

**Valley Collaborative****Cumulative Surplus Calculation - FY 21****As of March 31, 2021**

|      |                                                                   |                         |
|------|-------------------------------------------------------------------|-------------------------|
| (A)  | Voted Cumulative Surplus as of June 30, 2020                      | 5,005,919               |
| (B)  | Amount of (A) used to replenish capital projects fund             | -                       |
|      | Amount of (A) returned to member districts                        | (600,000)               |
| ( c) | Unexpended FY 21 General Funds                                    | 1,755,192               |
| (D)  | Cumulative Surplus as of 6/30/21                                  | 6,161,111               |
| ( E) | FY 21 Total General Fund Expenditures                             | 17,164,775              |
| (F)  | Cumulative Surplus Percentage                                     | 36%                     |
|      | Estimated Amount of Excess Cumulative Surplus as of June 30, 2021 | <u><u>1,869,917</u></u> |

**Valley Collaborative**  
Interim Statement of Net Assets  
For the Period Ended March 31, 2021

| <b>UNAUDITED</b>                                  |                             |
|---------------------------------------------------|-----------------------------|
| <b>ASSETS</b>                                     |                             |
| <b>Current Assets</b>                             |                             |
| Cash and Cash Equivalents                         | \$ 5,001,132                |
| Restricted Investments - OPEB                     | 5,006,641                   |
| Accounts Receivable, Net                          | 3,922,998                   |
| Prepaid Expenses and Other Assets                 | 36,916                      |
| Cash Held for Member Districts                    | 527,261                     |
| <b>Total Current Assets</b>                       | <u>14,494,948</u>           |
| <b>Non-Current Assets</b>                         |                             |
| Land & Building                                   | 5,521,148                   |
| Furniture, Equipment, and Leasehold Improvements, |                             |
| Net of Depreciation                               | 2,241,335                   |
| Construction in Progress                          | -                           |
| <b>Total Non-Current Assets</b>                   | <u>7,762,483</u>            |
| <b>TOTAL ASSETS</b>                               | <u><u>\$ 22,257,431</u></u> |
| <b>LIABILITIES AND NET ASSETS</b>                 |                             |
| <b>Current Liabilities</b>                        |                             |
| Accounts Payable and Accrued Liabilities          | \$ 1,165,662                |
| Other Liabilities                                 | 2,279,348                   |
| Member District Accounts (Settlement)             | 527,261                     |
| <b>Total Current Liabilities</b>                  | <u>3,972,271</u>            |
| <b>Total Liabilities</b>                          | <u>3,972,271</u>            |
| <b>Net Assets</b>                                 |                             |
| Operating - Unrestricted                          | 5,576,283                   |
| Restricted - Student Activities                   | 21,154                      |
| Reserved - OPEB Trust                             | 2,754,226                   |
| Reserved - Capital                                | 1,700,000                   |
| Invested in Capital Assets, Net of Related Debt   | 8,233,497                   |
| <b>Total Net Assets</b>                           | <u>18,285,160</u>           |
| <b>TOTAL LIABILITIES AND NET ASSETS</b>           | <u><u>\$ 22,257,431</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**  
Interim Statement of Revenues, Expenses and Changes in Net Assets  
For the Period Ending March 31, 2021  
148 of 200 (74%) School Days

| <b>UNAUDITED</b>                        |                            |                          |
|-----------------------------------------|----------------------------|--------------------------|
|                                         | <b>ORIGINAL<br/>BUDGET</b> | <b>ACTUAL</b>            |
| <b>REVENUES</b>                         |                            |                          |
| Services                                | \$ 15,841,829              | \$ 11,629,508            |
| State Contracts                         | 2,100,000                  | 1,890,298                |
| Other                                   | 200,000                    | 210,183                  |
| Interest                                | 20,000                     | 1,676                    |
| <b>Total Revenues</b>                   | <b>18,161,829</b>          | <b>13,731,665</b> 75.61% |
| <b>EXPENSES</b>                         |                            |                          |
| Salaries                                | 11,619,363                 | 8,029,387                |
| Employee Benefits                       | 2,383,214                  | 1,638,549                |
| Operating Expenses                      | 2,050,100                  | 1,346,457                |
| Leases & Rentals                        | 437,098                    | 407,733                  |
| Depreciation                            | 725,000                    | 573,071                  |
| <b>Total Expenses</b>                   | <b>17,214,775</b>          | <b>11,995,197</b> 69.68% |
| <b>Change in Net Assets - Operating</b> | <b>\$ 947,054</b>          | <b>\$ 1,736,468</b>      |
| <b>Non Operating Activities</b>         |                            |                          |
| Return to Member Districts              | -                          | -                        |
| Non-Operating Expenses (1)              | (675,000)                  | (471,014)                |
| <b>Change in Net Assets</b>             | <b>\$ 272,054</b>          | <b>\$ 1,265,454</b>      |

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 Revenues, Expenses and Changes in Net Assets  
For the Period Ending March 31, 2021  
148 of 200 (74%) School Days

| <b>UNAUDITED</b>                        |                   |                              |        |                                     |        |                                |        |
|-----------------------------------------|-------------------|------------------------------|--------|-------------------------------------|--------|--------------------------------|--------|
|                                         | <b>BUDGET</b>     | <b>ACTUAL MARCH<br/>2021</b> |        | <b>ACTUAL<br/>FEBRUARY<br/>2021</b> |        | <b>ACTUAL<br/>JANUARY 2021</b> |        |
| <b>REVENUES</b>                         |                   |                              |        |                                     |        |                                |        |
| Services                                | \$ 15,841,829     | \$ 11,629,508                |        | \$ 9,791,521                        |        | \$ 8,563,363                   |        |
| State Contracts                         | 2,100,000         | 1,890,298                    |        | 1,695,047                           |        | 1,400,362                      |        |
| Other                                   | 200,000           | 210,183                      |        | 178,755                             |        | 152,338                        |        |
| Interest                                | 20,000            | 1,676                        |        | 1,445                               |        | 1,150                          |        |
| <b>Total Revenues</b>                   | <b>18,161,829</b> | <b>13,731,665</b>            | 75.61% | <b>11,666,768</b>                   | 64.24% | <b>10,117,213</b>              | 55.71% |
| <b>EXPENSES</b>                         |                   |                              |        |                                     |        |                                |        |
| Salaries                                | 11,619,363        | 8,029,387                    |        | 7,142,362                           |        | 6,220,407                      |        |
| Employee Benefits                       | 2,383,214         | 1,638,549                    |        | 1,458,758                           |        | 1,265,269                      |        |
| Operating Expenses                      | 2,050,100         | 1,346,457                    |        | 1,143,070                           |        | 984,423                        |        |
| Leases & Rentals                        | 437,098           | 407,733                      |        | 392,515                             |        | 377,296                        |        |
| Depreciation                            | 725,000           | 573,071                      |        | 509,396                             |        | 445,722                        |        |
| <b>Total Expenses</b>                   | <b>17,214,775</b> | <b>11,995,197</b>            | 69.68% | <b>10,646,101</b>                   | 61.84% | <b>9,293,117</b>               | 53.98% |
| <b>Change in Net Assets - Operating</b> | <b>\$ 947,054</b> | <b>\$ 1,736,468</b>          |        | <b>\$ 1,020,667</b>                 |        | <b>\$ 824,096</b>              |        |
| <b>Non Operating Activities</b>         |                   |                              |        |                                     |        |                                |        |
| Return to Member Districts              | -                 |                              |        |                                     |        |                                |        |
| Non-Operating Expenses (1)              | (675,000)         | (471,014)                    |        | (474,754)                           |        | (490,804)                      |        |
| <b>Change in Net Assets</b>             | <b>\$ 272,054</b> | <b>\$ 1,265,454</b>          |        | <b>\$ 545,913</b>                   |        | <b>\$ 333,292</b>              |        |

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

## Profit and Loss by Program March 31, 2021

March 31, 2021  
148 of 200 Days

|                                           | 100         | 200          | 400          | 712          | 660          | 450          | 665       | 500        | 101        | 102        |               |
|-------------------------------------------|-------------|--------------|--------------|--------------|--------------|--------------|-----------|------------|------------|------------|---------------|
|                                           | Central     | HS Site 3    | HS Site 2    | Middle       | Elementary   | Therapy      | Home      | DDS        | MRC        | MRC        | Total         |
|                                           | Admin       |              |              | School       |              |              | Services  |            | Education  | Supportive |               |
|                                           |             |              |              |              |              |              |           |            | & Training | Work       |               |
| <b>REVENUES</b>                           |             |              |              |              |              |              |           |            |            |            |               |
| Services                                  | \$ -        | \$ 3,979,579 | \$ 2,207,041 | \$ 1,724,335 | \$ 3,697,369 | \$ 21,184    | \$ -      | \$ -       | \$ -       | \$ -       | \$ 11,629,508 |
| State Contracts                           | -           | -            | -            | -            | -            | -            | -         | 1,603,081  | 188,116    | 99,101     | 1,890,298     |
| Other                                     | 63,591      | 1,325        | -            | -            | 2,704        | 2,565        | 13,553    | 126,445    | -          | -          | 210,183       |
| Interest                                  | 1,676       | -            | -            | -            | -            | -            | -         | -          | -          | -          | 1,676         |
| <b>Total Revenues</b>                     | 65,267      | 3,980,904    | 2,207,041    | 1,724,335    | 3,700,073    | 23,749       | 13,553    | 1,729,526  | 188,116    | 99,101     | 13,731,665    |
| <b>EXPENSES</b>                           |             |              |              |              |              |              |           |            |            |            |               |
| Salaries                                  | 686,283     | 2,130,288    | 1,142,333    | 967,678      | 2,143,415    | 10,630       | 96        | 770,297    | 118,168    | 60,199     | 8,029,387     |
| Employee Benefits                         | 561,253     | 257,087      | 139,369      | 115,426      | 258,688      | 161,842      | -         | 144,884    | -          | -          | 1,638,549     |
| Operating Expenses                        | 657,198     | 225,538      | 105,059      | 88,030       | 185,451      | 1,324        | 68        | 70,413     | 9,582      | 3,794      | 1,346,457     |
| Leases & Rentals                          | 26,976      | -            | 5,138        | -            | 255,951      | -            | -         | 96,342     | 18,661     | 4,665      | 407,733       |
| Depreciation                              | 74,101      | 193,457      | 142,026      | 46,411       | 51,450       | 4,917        | 480       | 77,077     | 4,042      | 224        | 573,071       |
| <b>Total Expenses</b>                     | 2,005,811   | 2,806,370    | 1,533,925    | 1,217,545    | 2,894,955    | 178,713      | 644       | 1,159,013  | 150,453    | 68,882     | 11,995,197    |
| <b>Net Income Before Admin Allocation</b> | (1,940,544) | 1,174,534    | 673,116      | 506,790      | 805,118      | (154,964)    | 12,909    | 570,513    | 37,663     | 30,219     | 1,736,468     |
| Admin Allocation                          | (1,940,544) | 565,049      | 308,849      | 245,147      | 582,886      | 35,983       | 130       | 173,852    | 22,568     | 10,332     | (0)           |
| <b>Operating Net Income</b>               | \$ -        | \$ 609,485   | \$ 364,267   | \$ 261,643   | \$ 222,232   | \$ (190,947) | \$ 12,779 | \$ 396,661 | \$ 15,095  | \$ 19,887  | \$ 1,736,468  |

**VALLEY COLLABORATIVE  
TREASURER'S REPORT  
JANUARY 31, 2021**

|                                       |                | <u>Beginning<br/>Balance</u> | <u>Receipts</u>      | <u>Payroll</u>           | <u>Accounts<br/>Payable</u> | <u>Earnings</u>       | <u>Transfers</u>  | <u>Ending<br/>Balance</u> |
|---------------------------------------|----------------|------------------------------|----------------------|--------------------------|-----------------------------|-----------------------|-------------------|---------------------------|
| <b>ENTERPRISE BANK ACCOUNTS</b>       |                |                              |                      |                          |                             |                       |                   |                           |
| Operating                             | a/c 493426     | \$ 2,415,425.80              | \$ 755,633.50        |                          | \$ (323,282.71)             |                       | \$ (1,500,000.00) | \$ 1,347,776.59           |
| Payroll                               | a/c 795823     | \$ 1,487,755.24              |                      | \$ (1,105,944.82)        |                             |                       | \$ 1,500,000.00   | \$ 1,881,810.42           |
| Joe's Bistro                          | a/c 531401     | \$ 1,470.18                  |                      |                          | \$ (549.15)                 |                       |                   | \$ 921.03                 |
| ICS MMDA                              | a/c 856490     | \$ 55,085.25                 |                      |                          |                             | \$ 4.67               |                   | \$ 55,089.92              |
| Capital Reserve                       | a/c 4063467    | \$ 1,500,000.00              |                      |                          |                             |                       |                   | \$ 1,500,000.00           |
| Independence Project                  | a/c 821315     | \$ 4,614.36                  | \$ -                 | \$ -                     | \$ (3,000.00)               | \$ -                  | \$ -              | \$ 1,614.36               |
| <b>TOTAL ENTERPRISE BANK ACCOUNTS</b> |                | <u>\$ 5,464,350.83</u>       | <u>\$ 755,633.50</u> | <u>\$ (1,105,944.82)</u> | <u>\$ (326,831.86)</u>      | <u>\$ 4.67</u>        | <u>\$ -</u>       | <u>\$ 4,787,212.32</u>    |
| <br>MMDT                              | a/c 0044263747 | <u>\$ 1,002,831.33</u>       | <u>\$ -</u>          | <u>\$ -</u>              | <u>\$ -</u>                 | <u>\$ 144.96</u>      | <u>\$ -</u>       | <u>\$ 1,002,976.29</u>    |
| <br>Total Unrestricted Cash           |                | <u>\$ 6,467,182.16</u>       | <u>\$ 755,633.50</u> | <u>\$ (1,105,944.82)</u> | <u>\$ (326,831.86)</u>      | <u>\$ 149.63</u>      | <u>\$ -</u>       | <u>\$ 5,790,188.61</u>    |
| <br>PARS OPEB Trust                   |                | <u>\$ 4,918,528.51</u>       | <u>\$ -</u>          | <u>\$ -</u>              | <u>\$ (1,182.46)</u>        | <u>\$ (31,817.55)</u> | <u>\$ -</u>       | <u>\$ 4,885,528.50</u>    |
| <br>TOTAL CASH                        |                | <u>\$ 11,385,710.67</u>      | <u>\$ 755,633.50</u> | <u>\$ (1,105,944.82)</u> | <u>\$ (328,014.32)</u>      | <u>\$ (31,667.92)</u> | <u>\$ -</u>       | <u>\$ 10,675,717.11</u>   |

**VALLEY COLLABORATIVE  
TREASURER'S REPORT  
FEBRUARY 28, 2021**

|                                       |                | <u>Beginning<br/>Balance</u> | <u>Receipts</u>      | <u>Payroll</u>           | <u>Accounts<br/>Payable</u> | <u>Earnings</u>     | <u>Transfers</u> | <u>Ending<br/>Balance</u> |
|---------------------------------------|----------------|------------------------------|----------------------|--------------------------|-----------------------------|---------------------|------------------|---------------------------|
| <b>ENTERPRISE BANK ACCOUNTS</b>       |                |                              |                      |                          |                             |                     |                  |                           |
| Operating                             | a/c 493426     | \$ 1,347,776.59              | \$ 521,956.97        |                          | \$ (164,716.16)             |                     | \$ (500,000.00)  | \$ 1,205,017.40           |
| Payroll                               | a/c 795823     | \$ 1,881,810.42              |                      | \$ (1,269,087.21)        |                             |                     | \$ 500,000.00    | \$ 1,112,723.21           |
| Joe's Bistro                          | a/c 531401     | \$ 921.03                    | \$ 615.00            |                          |                             |                     |                  | \$ 1,536.03               |
| ICS MMDA                              | a/c 856490     | \$ 55,089.92                 |                      |                          |                             | \$ 4.22             |                  | \$ 55,094.14              |
| Capital Reserve                       | a/c 4063467    | \$ 1,500,000.00              |                      |                          |                             |                     |                  | \$ 1,500,000.00           |
| Independence Project                  | a/c 821315     | \$ 1,614.36                  | \$ -                 | \$ -                     | \$ -                        | \$ -                | \$ -             | \$ 1,614.36               |
| <b>TOTAL ENTERPRISE BANK ACCOUNTS</b> |                | <u>\$ 4,787,212.32</u>       | <u>\$ 522,571.97</u> | <u>\$ (1,269,087.21)</u> | <u>\$ (164,716.16)</u>      | <u>\$ 4.22</u>      | <u>\$ -</u>      | <u>\$ 3,875,985.14</u>    |
| <br>MMDT                              | a/c 0044263747 | <u>\$ 1,002,976.29</u>       | <u>\$ -</u>          | <u>\$ -</u>              | <u>\$ -</u>                 | <u>\$ 115.52</u>    | <u>\$ -</u>      | <u>\$ 1,003,091.81</u>    |
| <br>Total Unrestricted Cash           |                | <u>\$ 5,790,188.61</u>       | <u>\$ 522,571.97</u> | <u>\$ (1,269,087.21)</u> | <u>\$ (164,716.16)</u>      | <u>\$ 119.74</u>    | <u>\$ -</u>      | <u>\$ 4,879,076.95</u>    |
| <br>PARS OPEB Trust                   |                | <u>\$ 4,885,528.50</u>       | <u>\$ -</u>          | <u>\$ -</u>              | <u>\$ (1,450.40)</u>        | <u>\$ 55,440.86</u> | <u>\$ -</u>      | <u>\$ 4,939,518.96</u>    |
| <br>TOTAL CASH                        |                | <u>\$ 10,675,717.11</u>      | <u>\$ 522,571.97</u> | <u>\$ (1,269,087.21)</u> | <u>\$ (166,166.56)</u>      | <u>\$ 55,560.60</u> | <u>\$ -</u>      | <u>\$ 9,818,595.91</u>    |

**VALLEY COLLABORATIVE  
TREASURER'S REPORT  
MARCH 31, 2021**

|                                       |                | <u>Beginning<br/>Balance</u> | <u>Receipts</u>        | <u>Payroll</u>         | <u>Accounts<br/>Payable</u> | <u>Earnings</u>     | <u>Transfers</u>  | <u>Ending<br/>Balance</u> |
|---------------------------------------|----------------|------------------------------|------------------------|------------------------|-----------------------------|---------------------|-------------------|---------------------------|
| <b>ENTERPRISE BANK ACCOUNTS</b>       |                |                              |                        |                        |                             |                     |                   |                           |
| Operating                             | a/c 493426     | \$ 1,205,017.40              | \$ 1,757,021.30        |                        | \$ (200,226.47)             |                     | \$ (1,500,000.00) | \$ 1,261,812.23           |
| Payroll                               | a/c 795823     | \$ 1,112,723.21              |                        | \$ (934,785.24)        |                             |                     | \$ 1,500,000.00   | \$ 1,677,937.97           |
| Joe's Bistro                          | a/c 531401     | \$ 1,536.03                  |                        |                        | \$ (385.15)                 |                     |                   | \$ 1,150.88               |
| ICS MMDA                              | a/c 856490     | \$ 55,094.14                 |                        |                        |                             | \$ 2.56             |                   | \$ 55,096.70              |
| Capital Reserve                       | a/c 4063467    | \$ 1,500,000.00              |                        |                        |                             |                     |                   | \$ 1,500,000.00           |
| Independence Project                  | a/c 821315     | \$ 1,614.36                  | \$ -                   | \$ -                   | \$ (250.00)                 | \$ -                | \$ -              | \$ 1,364.36               |
| <b>TOTAL ENTERPRISE BANK ACCOUNTS</b> |                | <u>\$ 3,875,985.14</u>       | <u>\$ 1,757,021.30</u> | <u>\$ (934,785.24)</u> | <u>\$ (200,861.62)</u>      | <u>\$ 2.56</u>      | <u>\$ -</u>       | <u>\$ 4,497,362.14</u>    |
| <br>MMDT                              | a/c 0044263747 | <u>\$ 1,003,091.81</u>       | <u>\$ -</u>            | <u>\$ -</u>            | <u>\$ -</u>                 | <u>\$ 113.21</u>    | <u>\$ -</u>       | <u>\$ 1,003,205.02</u>    |
| <br>Total Unrestricted Cash           |                | <u>\$ 4,879,076.95</u>       | <u>\$ 1,757,021.30</u> | <u>\$ (934,785.24)</u> | <u>\$ (200,861.62)</u>      | <u>\$ 115.77</u>    | <u>\$ -</u>       | <u>\$ 5,500,567.16</u>    |
| <br>PARS OPEB Trust                   |                | <u>\$ 4,939,518.96</u>       | <u>\$ -</u>            | <u>\$ -</u>            | <u>\$ (1,195.09)</u>        | <u>\$ 68,317.02</u> | <u>\$ -</u>       | <u>\$ 5,006,640.89</u>    |
| <br>TOTAL CASH                        |                | <u>\$ 9,818,595.91</u>       | <u>\$ 1,757,021.30</u> | <u>\$ (934,785.24)</u> | <u>\$ (202,056.71)</u>      | <u>\$ 68,432.79</u> | <u>\$ -</u>       | <u>\$ 10,507,208.05</u>   |

VALLEY COLLABORATIVE  
PARS OPEB Trust ProgramAccount Report for the Period  
1/1/2021 to 1/31/2021Heidi Kriger  
Treasurer  
Valley Collaborative  
40 Linnell Circle  
Billerica, MA 01821**Account Summary**

| Source        | Beginning Balance<br>as of<br>1/1/2021 | Contributions | Earnings            | Expenses          | Distributions | Transfers     | Ending<br>Balance as of<br>1/31/2021 |
|---------------|----------------------------------------|---------------|---------------------|-------------------|---------------|---------------|--------------------------------------|
| OPEB          | \$4,918,528.51                         | \$0.00        | -\$31,817.55        | \$1,182.46        | \$0.00        | \$0.00        | \$4,885,528.50                       |
| <b>Totals</b> | <b>\$4,918,528.51</b>                  | <b>\$0.00</b> | <b>-\$31,817.55</b> | <b>\$1,182.46</b> | <b>\$0.00</b> | <b>\$0.00</b> | <b>\$4,885,528.50</b>                |

**Investment Selection****Source**

OPEB Vanguard Balanced Strategy

**Investment Objective****Source**

OPEB 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**

| Source | 1-Month | 3-Months | 1-Year | Annualized Return |         |          | Plan's Inception Date |
|--------|---------|----------|--------|-------------------|---------|----------|-----------------------|
|        |         |          |        | 3-Years           | 5-Years | 10-Years |                       |
| OPEB   | -0.65%  | 10.62%   | 13.71% | 8.48%             | 10.38%  | -        | 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

VALLEY COLLABORATIVE  
PARS OPEB Trust ProgramAccount Report for the Period  
2/1/2021 to 2/28/2021Heidi Kriger  
Treasurer  
Valley Collaborative  
40 Linnell Circle  
Billerica, MA 01821**Account Summary**

| Source        | Beginning Balance<br>as of<br>2/1/2021 | Contributions | Earnings           | Expenses          | Distributions | Transfers     | Ending<br>Balance as of<br>2/28/2021 |
|---------------|----------------------------------------|---------------|--------------------|-------------------|---------------|---------------|--------------------------------------|
| OPEB          | \$4,885,528.50                         | \$0.00        | \$55,440.86        | \$1,450.40        | \$0.00        | \$0.00        | \$4,939,518.96                       |
| <b>Totals</b> | <b>\$4,885,528.50</b>                  | <b>\$0.00</b> | <b>\$55,440.86</b> | <b>\$1,450.40</b> | <b>\$0.00</b> | <b>\$0.00</b> | <b>\$4,939,518.96</b>                |

**Investment Selection****Source**

OPEB Vanguard Balanced Strategy

**Investment Objective****Source**

OPEB 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**

| Source | 1-Month | 3-Months | 1-Year | Annualized Return |         |          | Plan's Inception Date |
|--------|---------|----------|--------|-------------------|---------|----------|-----------------------|
|        |         |          |        | 3-Years           | 5-Years | 10-Years |                       |
| OPEB   | 1.13%   | 3.68%    | 19.84% | 10.07%            | 10.65%  | -        | 6/24/2015             |

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

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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

VALLEY COLLABORATIVE  
PARS OPEB Trust ProgramAccount Report for the Period  
3/1/2021 to 3/31/2021Heidi Kriger  
Treasurer  
Valley Collaborative  
40 Linnell Circle  
Billerica, MA 01821**Account Summary**

| Source        | Beginning Balance<br>as of<br>3/1/2021 | Contributions | Earnings           | Expenses          | Distributions | Transfers     | Ending<br>Balance as of<br>3/31/2021 |
|---------------|----------------------------------------|---------------|--------------------|-------------------|---------------|---------------|--------------------------------------|
| OPEB          | \$4,939,518.96                         | \$0.00        | \$68,317.02        | \$1,195.09        | \$0.00        | \$0.00        | \$5,006,640.89                       |
| <b>Totals</b> | <b>\$4,939,518.96</b>                  | <b>\$0.00</b> | <b>\$68,317.02</b> | <b>\$1,195.09</b> | <b>\$0.00</b> | <b>\$0.00</b> | <b>\$5,006,640.89</b>                |

**Investment Selection****Source**

OPEB Vanguard Balanced Strategy

**Investment Objective****Source**

OPEB 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**

| Source | 1-Month | 3-Months | 1-Year | Annualized Return |         |          | Plan's Inception Date |
|--------|---------|----------|--------|-------------------|---------|----------|-----------------------|
|        |         |          |        | 3-Years           | 5-Years | 10-Years |                       |
| OPEB   | 1.38%   | 1.86%    | 33.99% | 10.70%            | 9.93%   | -        | 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

**AMENDMENT TO THE  
AGREEMENT FOR ADMINISTRATIVE SERVICES  
FOR THE VALLEY COLLABORATIVE  
PARS PUBLIC AGENCIES POST-RETIREMENT HEALTH CARE PLAN TRUST**

The Agreement for Administrative Services in connection with the Valley Collaborative PARS Public Agencies Post-Retirement Health Care Plan Trust entered into on June 18, 2015 ("Agreement") between Phase II Systems, a California corporation, doing business as Public Agency Retirement Services and PARS (hereinafter "PARS") and the Valley Collaborative ("Agency") is hereby amended effective July 1, 2021, as follows:

1. Section 16, Term of Agreement, is hereby amended to read:

This Agreement shall remain in effect for the period beginning July 1, 2021 and ending June 30, 2024 ("Term"). This Agreement may be terminated at any time by giving thirty (30) days written notice to the other party of the intent to terminate.

2. All other terms and conditions under the Agreement shall remain unchanged.

Valley Collaborative

Public Agency Retirement Services

By: Heidi Kriger  
Name: Heidi Kriger  
Title: Treasurer

By: \_\_\_\_\_  
Name: Tod Hammeras  
Title: Chief Financial Officer

Dated: 4/27/21

Dated: \_\_\_\_\_



## Central Administration Office

25 Linnell Circle, Billerica MA 01821 \* Tel: (978)528-7826 \* <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  
Date: April 29, 2021  
Re: Valley Collaborative Lease Agreements

---

Due to projected adult program expansion, Valley has been working to procure additional leased space over the past year. As the Board will recall, on March 4, 2020 Valley Collaborative submitted a request for proposals on the Secretary of State's Massachusetts Register and COMMBUYS, for the Lease of Property for Special Education Adult Programs. One proposal was received from Parsons Commercial Group, KS Partners.

In June of 2020, we ceased lease negotiations with KS Partners when the Collaborative would not agree to the insertion of the offensive and discriminatory conditions required by Connector Park in their proposed lease agreement. Out of necessity, Valley entered into a one year lease extension with MacCormack Properties, LLC, at 17 Bridge St. Billerica, MA.

Due to the pending cessation of our Adult Program lease with MacCormack Properties, LLC, at 17 Bridge St. Billerica, MA, on June 30, 2021, Valley Collaborative posted and advertised a Request for Proposals for Leased Space on March 17, 2021. As our adult program space needs will continue to change over the course of FY'22, Valley requested bid responses for a one year lease term. The posting closed on Tuesday, April 20, 2021 at 10AM.

One proposal was received from MacCormack Properties, LLC offering to extend the lease at 17 Bridge St. through June 30, 2022, at the current annual rent of \$28,072.00, with options to extend in FY'23 and FY'24.

Our recommendation is for the Board to award the Adult Services Program Leased Space contract to MacCormack Properties, LLC, for a 1 year lease ext. of property at 17 Bridge St. Billerica, MA, to start July 1, 2021.

The Collaborative will continue to look for space that will suit the instructional needs of our DDS and MRC programs post Covid-19. The current space at 25 Linnell Circle will continue to be used by Central Office, DDS and DESE programs in FY'22.

### Required Action:

Vote to approve a one-year lease extension



## Central Administration Office

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

### MEMORANDUM

To: Valley Collaborative Board of Directors  
From: Dr. Chris Scott, Executive Director  
Date: April 29, 2021  
Re: Member Districts Hiring Valley Staff – During School Year

---

Valley Collaborative prides itself on creating an employee friendly environment focused on providing excellent special education services to the most vulnerable and involved student and adult populations. We take great care in providing our staff with targeted professional development to aid them in furthering their professional growth enabling them to provide the best possible services to our students and adults.

Historically, Valley was a known training ground for surrounding districts and we experienced a significant turnover rate which of course was quite disruptive to programming. In collaboration with the Board of Directors, we have worked diligently to ensure we could provide competitive wages as well as a mutual collegial understanding of a less disruptive timeline for staff to seamlessly exit Valley and enter a member district's workforce. This mutual understanding resulted in smoother transitions for our students, adults, and families as well the employee and his/her new employer.

We understand and appreciate the complexities of current staffing shortages, exasperated by the COVID-19 pandemic. We are concerned that there may be even further staff shortages in the coming months as some district's prepare for in-person learning and meeting their demands of compensatory services and therefore this dynamic will present itself again.

As we are all acutely aware, Human Resources is job #1 and finding the right fit is imperative to an organization's health. We certainly would not encourage a staff person to stay on at Valley if he/she determines it is not a great fit but would otherwise do well in another district.

We would greatly appreciate, for the well being of Valley students, if you would kindly ask that your hiring supervisors make every effort to refrain from hiring Valley staff between September and June. In the event that this is not feasible, we could work together with a mutually agreed upon timeline.

**Required Action:**

None

**Attachments:**

None



## Central Administration Office

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

### MEMORANDUM

To: Valley Collaborative Board of Directors  
From: Dr. Chris A. Scott, Executive Director  
Glen Costello, Assistant Principal, STEM Lead  
Alternative Programming, Valley Middle School, Valley Transitional High School  
Date: April 29, 2021  
Re: School Safety Committee Update

---

In January 2021 Navigate 360 completed a risk assessment for Valley Middle School and Valley Transitional High School located at 40 Linnell Circle, Billerica and Valley Elementary School located at 135 Coburn Road, Tyngsborough. Due to the increased safety measures Valley has taken over the past several years, Valley scored on the higher end of moderate preparedness range with an overall preparedness score of 69%. The risk assessment identified Valley's areas of need as well as its areas of strength. Please see the attached summary excerpt from the risk assessment report.

As a result of the risk assessment, the Valley Safety Committee has developed a list of prioritized high need areas. Valley is currently working with the Billerica and Tyngsborough Police Departments to update Valley's safety plans. Valley has also implemented the use of the Prepared App which allows staff to communicate in real time during a crisis. The Prepared App also includes a tracking feature for use post crisis situation.

All Valley staff have completed the annual A.L.I.C.E. training module. In addition, staff at 40 Linnell Circle, Billerica have participated in a live A.L.I.C.E. training and drill with the Billerica Police Department and have been trained on the Prepared App. A second training and drill for this group will be held in May. Valley Elementary School Staff will participate in live trainings and drills with the Tyngsborough Police Department also scheduled for May. An additional de-escalation training is planned for front desk staff.

At 135 Coburn Road, Tyngsborough, Valley has installed alarms on exterior doors and is in the process of adding exterior cameras. For both locations, Billerica and Tyngsborough, Valley has installed first aid kits throughout the buildings. We have also provided remote access to the security cameras at 40 Linnell Circle, Billerica, to Valley administrators and the Billerica Police Department. We will be working with the Tyngsborough Police Department to provide the same access for the Elementary School.

As per the recommendation of Navigate 360, Valley will be purchasing black out shades and is currently working with the Billerica Fire Department to determine which door barricade devices are acceptable. Valley is implementing a visitor management system through SchoolPass. Valley is also in the process of gathering quotes to increase the exterior lighting of both parking lots. In addition, Valley is also in the process of installing lockboxes with keys, badges and blueprints for the first responders in Billerica and Tyngsborough.

Lastly, Valley is also implementing the mass notification feature of Blackboard to further build upon our communication efforts with families and staff. This feature will not only streamline communication for school closures due to inclement weather/power outages, but can also be used for further instantaneous communication in the event of an emergency.

**Required Action:**

None

**Attachments:**

Navigate 360 All Hazards Risk Assessment

ALICE Training Certificate

Risk Assessment Email

## *Navigate360* Preparedness Scoring

The primary areas that were observed and evaluated are listed in the Preparedness Score Summary Table. These systems are part of a common emergency management program and are critical to increasing the organizations survival before, during and after an incident. The information contained in this report may be a good waypoint to justify future security investments, additional training, and the development of policies. The Overall Preparedness Score is 69% out of a possible 100% Score.

| Section                     | Preparedness Score by Percentage | Preparedness Score Summary |
|-----------------------------|----------------------------------|----------------------------|
| Hazard & Threat Assessment  | 72%                              | High                       |
| Emergency Operations Plan   | 86%                              | High                       |
| Prevention Programs         | 66%                              | Moderate                   |
| Response & Training         | 91%                              | Very High                  |
| Technology & Infrastructure | 57%                              | Moderate                   |
| Recovery Planning           | 45%                              | Low                        |
| <b>Total Average Score</b>  | <b>69%</b>                       | <b>Moderate</b>            |

The above preparedness scores measure your organization's readiness level and your commitment to overall preparedness. The questions within the assessment are drawn from industry best practices and corresponding industry standards and have been assigned score values by security and emergency response professionals. The scoring key is listed below.

## *Navigate360* Preparedness Scoring Chart

| Score     | Points | Score Summary                                                                                                         |
|-----------|--------|-----------------------------------------------------------------------------------------------------------------------|
| Very Low  | 1-40   | Scoring 1-40 indicates a very low level of preparedness. Any deficient categories should be addressed immediately.    |
| Low       | 41-50  | Scoring 41-50 points indicates a low level of preparedness. Any deficient categories should be addressed immediately. |
| Moderate  | 51-70  | Scoring 51-70 points is a moderate level of preparedness. Any deficient categories should be addressed.               |
| High      | 71-90  | Scoring 71-90 points indicates a high level of preparedness. Deficient categories should be addressed.                |
| Very High | 91-100 | Scoring 91-100 points indicates a very high level of preparedness. Deficient categories should be addressed.          |

# **NIGHTLOCK®**

## **DOOR SECURITY DEVICES**



**From:** Joe Hendry [<mailto:jhendry@navigate360.com>]

**Sent:** Monday, February 8, 2021 3:56 PM

**To:** Glen Costello <[gcostello@valleycollaborative.org](mailto:gcostello@valleycollaborative.org)>

**Subject:** [EXTERNAL] Re: [EXTERNAL] Re: [EXTERNAL] Re: [EXTERNAL] Re: [EXTERNAL] Risk Assessment PDF

Hi Glen,

I was able to re-score your EOP Section of the Risk Assessment using the documents you provided. There were minor changes in the Hazard & Threat and Technology and Infrastructure changes.

The EOP score almost doubled to 86. I redid the gap analysis section and removed two recommendations. Give it another read and please let me know if you have any questions.

Best Regards,

Joe

**Joe Hendry** PSP, CLEE  
Senior Director On-site Services

[ALICE Training.com](http://ALICE Training.com) [P3Intel.com](http://P3Intel.com)  
[SocialSentinel.com](http://SocialSentinel.com)

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**Direct:** 330-661-0109

**Mobile:** 330-256-1999

**Office:** 330-661-0106

[www.navigate360.com](http://www.navigate360.com)

3900 Kinross Lakes Parkway. Suite 200, Richfield, OH 44286

*Navigate360*

Consulting Services – All Hazards Risk Assessment

**Prepared for:**

Valley Collaborative

**Prepared by:**

Joseph Hendry, PSP, CLEE Consultant

**Dates of Assessment:**

January 11-13, 2021





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



## Executive Summary

The purpose of the review was to assess the organization's preparation and readiness to respond to All-Hazards and Security related incidents. The assessment of Valley Collaborative took place on January 11-13, 2021.

In addition to the on-site assessment, an All-Hazards program tool, completed by the consultant, was utilized to help in the analysis of the vulnerabilities, preparedness and other various risks that may be associated with the site.

Assessment participants included: Lead Assessor Joe Hendry, PSP, CLEE; Glen Costello, Assistant Principal/Safety Lead; Amy Murphy, Principal.

The report will make recommendations as to reasonable security measures that would most enhance the safety of the students, staff, and visitors of the schools. It is recognized that security measures implemented at Valley Collaborative facilities cannot compromise the viability of those facilities as welcoming and pleasant environments and that security enhancements cannot unduly hinder access by students or staff movement within their workspace. The report will attempt to strike a balance that allows for the greatest level of security, while maintaining the collaborative atmosphere and character of Valley Collaborative.

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| Options to Consider.....             | 20-45 |

## Options to Consider

|                                  |       |
|----------------------------------|-------|
| Organization Wide.....           | p. 20 |
| High School/Middle School.....   | p. 30 |
| Intermediate/Primary School..... | p. 35 |

## References and Sources

The surveys used, and considerations provided, in this report are based upon nationally accepted best practices and Navigate360's experience in working with schools across the United States. The following resources support these considerations and represent current industry standards of care and best practices:

### **Educational Facilities Vulnerability/ Hazard Assessment Checklist**

American Clearinghouse on Educational Facilities

### **Implementing Physical Protection Systems, A Practical Guide (Second Edition)**

Dave Patterson, CPP, PSP 2013

### **Guide for Developing High-Quality School Emergency Operations Plans**

FEMA 2013

### **NFPA 730: Guide for Premises Security**

National Fire Protection Association, 2020

### **NFPA 101: Life Safety Code**

National Fire Protection Association 2018

### **NFPA 3000: Standard for an Active Shooter/ Hostile Event Response (ASHER) Program**

National Fire Protection Association 2021

### **The Role of Districts in Developing High-Quality School Emergency Operations Plans: A Companion to the School Guide**

U.S Departments of Education, Justice, Health and Human Services and Homeland Security, 2019

### **Physical Security Principles**

ASIS International, 2015

## Preparedness Scoring

The primary areas that were observed and evaluated are listed in the Preparedness Score Summary Table. These systems are part of a common emergency management program and are critical to increasing the organizations survival before, during and after an incident. The information contained in this report may be a good waypoint to justify future security investments, additional training, and the development of policies. The Overall Preparedness Score is 69% out of a possible 100% Score.

| Section                     | Preparedness Score by Percentage | Preparedness Score Summary |
|-----------------------------|----------------------------------|----------------------------|
| Hazard & Threat Assessment  | 72%                              | High                       |
| Emergency Operations Plan   | 86%                              | High                       |
| Prevention Programs         | 66%                              | Moderate                   |
| Response & Training         | 91%                              | Very High                  |
| Technology & Infrastructure | 57%                              | Moderate                   |
| Recovery Planning           | 45%                              | Low                        |
| <b>Total Average Score</b>  | <b>69%</b>                       | <b>Moderate</b>            |

The above preparedness scores measure your organization's readiness level and your commitment to overall preparedness. The questions within the assessment are drawn from industry best practices and corresponding industry standards and have been assigned score values by security and emergency response professionals. The scoring key is listed below.

## Preparedness Scoring Chart

| Score     | Points | Score Summary                                                                                                         |
|-----------|--------|-----------------------------------------------------------------------------------------------------------------------|
| Very Low  | 1-40   | Scoring 1-40 indicates a very low level of preparedness. Any deficient categories should be addressed immediately.    |
| Low       | 41-50  | Scoring 41-50 points indicates a low level of preparedness. Any deficient categories should be addressed immediately. |
| Moderate  | 51-70  | Scoring 51-70 points is a moderate level of preparedness. Any deficient categories should be addressed.               |
| High      | 71-90  | Scoring 71-90 points indicates a high level of preparedness. Deficient categories should be addressed.                |
| Very High | 91-100 | Scoring 91-100 points indicates a very high level of preparedness. Deficient categories should be addressed.          |

## Summary of Analysis

The All-Hazards Analysis for Valley Collaborative shows an overall preparedness level of moderate. The overall score is comparable on average with other similar districts. This assessment is a snapshot of the locations at the time of the assessment. Future planned improvements are not considered when assessing the current level of risk. Full scale risk assessments are recommended every three years to assess improvements, identify new risks and determine any new recommendations. Minor improvements in the scoring categories will move Valley Collaborative into the high category.

### **Hazards and Threat Assessment (72):**

Overall, the Hazard & Threat Assessment section has identified a **high** level of preparedness in planning for hazards that could impact the facility. Efforts should be made to resolve the remaining gaps to improve safety and security. It is important to develop a plan for implementing these improvements and efforts should be made in a timely fashion to mitigate threats and reduce the risks of hazards.

### **Emergency Operations Plan (86):**

The survey tool graded preparedness score of the Emergency Operations Plan (EOP) section is **High**. The individuals responsible for Emergency Preparedness should review the gaps identified and determine which remaining gaps should be addressed as higher priorities. The EOP needs additions and further refining.

### **Prevention Programs (66):**

The Prevention Program has addressed most of the risks and hazards that could impact the organization and is rated as **moderate** for preparedness; some gaps exist that have been identified and require addressing. The individual responsible for Prevention Programs should review these gaps and recommendations identified by the assessment and determine priorities for further improvement.

### **Response and Training (91):**

This section is rated as **very high** and is the highest rated category for Valley Collaborative. This score is significantly higher than most districts and corporations in the United States that have been assessed. The goal from the gap analysis is to continue to conduct response and training at a high level and keep the Organizations ability to respond to emergencies maintained at a high level. This area is to be commended.

### **Technology and Infrastructure (57):**

Technology and Infrastructure for the organization is rated as **moderate**. The individuals responsible for these programs should review the gaps identified by this survey and determine priorities for improving security measures. Developing a plan with timelines for implementing improvements should be adopted to guide improvements in accordance with the Security Master Plan or Physical Protection System Plan. In interviews this area was remarked on by staff as needing attention.

### **Recovery Planning (45):**

Overall, the Recovery Planning for the organization has several gaps in dealing with the aftermath of an incident or emergency and is rated as **low** for preparedness. The organization should use the recommendations to determine what necessary changes need made or implemented to further reduce the impact of an incident and speed the return to normal operations after an emergency or incident.

### **Overall Site Preparedness:**

The overall preparedness score for all sections is approximately 63%. This analysis has identified the weaker from stronger areas which may assist in the planning and budgeting process and allow the organization to better focus on those areas which may require more attention. Specifically, the sections from the **lowest to the highest preparedness scores are**

1. Recovery Planning (45)
2. Technology and Infrastructure (57)
3. Prevention Programs (66)
4. Hazard and Threat Assessment (72)
5. Emergency Operations Plan (86)
6. Response and Training (91)

Where deficiencies are identified, consideration should be given to what can be improved through policies and procedural methods first, and then which measures will require a capital investment. The individuals responsible for emergency and security planning should review the remaining gaps identified by this assessment and determine the priorities for improving their capabilities and reducing risk.

The organization should determine what its own needs are based upon the organizational mission to mitigate known risks and hazards from the site. In addition, the organization should routinely review their risk programs, address any significant gaps, and document their progress towards a safer and more secure environment.

The Organization is to be commended on being very responsive to issues and problems. Everyone was helpful, quick to answer questions and definitely wanted to help the children in their buildings. The buildings were well maintained and very clean. It was obvious the district took the ongoing pandemic seriously and had measures in place to protect students and staff.

The culture I observed would best be described as “observant”, “kind”, “empathetic”, and “engaged”. There was a genuine, positive connection between staff members. It was nice to see staff members joke and be casual with each other while still being professional. While no situation is ever perfect, the atmosphere of the schools was bright and encouraging. There was genuine concern for staff and students, and it seemed as if the organization was working toward a common goal rather than operating as independent domains.

During an incident on the first day on-site, I was able to observe staff respond to a medical emergency during drop-off. The response was quick and efficient. Everyone reacted appropriately and worked well together, even while experiencing adverse outdoor temperatures. It was obvious the student’s needs were valued over normal operations.

Additionally, the cafeteria at the Billerica location was well run and had no safety issues. The staff person present, Joe, knew the location of all safety equipment and the kitchen was clean and organized. Many locations have safety violations discovered such as blocked fire equipment, expired food stuffs, or staff do not know the location of safety shutoffs. None of those issues occurred at the location.

## Summary of Site Characteristics

Overall, the Site Characteristics has shown a significant number of features that could negatively impact the facility. The organization should review those areas where it is practical to make some changes to reduce the risks identified in the analysis. It is important to develop a plan for implementing these improvements and efforts should be made in a timely fashion to resolve any gaps to reduce the risks of hazards. While it may not be practical to change some site characteristics there may be some measures that can be taken to improve the level of preparedness given the site characteristics in place.

Specifically, the site characteristics have shown a need to:

- Better protect critical infrastructure on the grounds.
- Improve protective measures in drop-off and pick-up areas.
- Select and train Rally Points and Reunification Areas that are not Schools Grounds related.
- Determine formal arrangements with other school districts, due to a crisis on school grounds, should the district's buses become unavailable.
- Improve security at playground areas.
- Use fencing to prevent elopement of students.

## Emergency Operations Plan Summary

This survey tool has identified the Emergency Preparedness program rating as **high**. The individuals responsible for Emergency Preparedness should immediately review the gaps identified by this survey and determine priorities for how to improve. The responsible parties should prepare a plan to determine how the gaps identified by the survey should be addressed. This is the second highest scoring area of the assessment. This review of the Emergency Operations Plan has shown a need to address the following areas:

- Include in the EOP sections for responding to a Hostage Taking or Kidnapping at the facility. Ensuring staff are trained to implement the plan expeditiously and information is readily available for First Responders can reduce the risks of a negative outcome to an incident.
- Include in the EOP a plan to consider differing capabilities and abilities of the student population. The existing EOP should be reviewed with special consideration given for visitors, special needs, and students with disabilities. Such challenges may limit the ability of students to evacuate or take other actions and must be a consideration when updating the EOP.
- Include in the EOP a requirement that drills, or exercises be conducted at least twice a year with First Responders such as Law Enforcement, Fire and Emergency Medical Personnel. This should help improve their response during an emergency. It is important to schedule drills every six months to familiarize first responders with site conditions and account for any changes in personnel and/or operations. The Organization should document these drills and remark if they are not conducted and why.
- Assign responsibility for making changes to the EOP between annual updates if it is determined if updates are necessary. Designating a responsible person or group to update the EOP between reviews is a proactive approach to protecting the school, staff, and students. It allows for small corrections to the EOP that could prevent major risks exposed by gaps in the plan or changing risk conditions. Exercises and actual emergencies as well as changes to the facility or security systems may dictate the need to review and update the plan.
- Include in the EOP procedures for staff and students who are not in a classroom at the time of an incident or emergency. Staff responsible for students in open space within the school and school grounds must understand the options available to them during an emergency. It would be difficult for even the best EOP to identify every possible scenario and the best action to take. The EOP can provide a variety of options that the staff may choose from based upon the incident or emergency to enhance survivability.
- Include in the Emergency Medical Plan provisions for Mass Casualty Incidents. The familiarity of Administrators and medical personnel with the EOP's Mass Casualty Plan can assist them in quickly recognizing the need for significant Emergency Medical Service response.
- Include in the EOP a formal plan for an infectious disease outbreak. While obviously there are actions being taken at this time, the actual plan is absent from the EOP.

## Response and Training Summary

This survey tool has identified the Response and Training Program for the organization as **very high** in preparation. The organization has implemented much training that addresses most of the risks and hazards that could impact the organization, however, a few gaps do exist at this facility that need addressed. The individuals responsible for Response & Training Programs should review the gaps identified by this survey and determine priorities for improving their capabilities. Training personnel is essential to ensure that individuals that individuals are properly prepared to respond to incidents and emergencies. Whether the hazards are natural, accidental, or intentional incidents such as Active Shooter scenarios; proper training is required to prepare individuals. Specifically, the training section has shown a need to:

- Check with Agencies providing School Resource Officers to see if they pass medical clearance prior to assignment and if they pass a fitness test at least once a year. This ensures fitness for duty of officers and if they can respond to critical situation where major exertion is required.
- Train and test communications systems to determine if they can inform everyone in the school about an emergency. This helps improve their ability to protect themselves. Procedures and practice in providing effective and timely communications can maximize the value of emergency communications.
- Consider training assigned School Resource Officers or designated Safety Personnel as ALICE Certified Instructors. Having more than one instructor to provide training and guidance to administrators, teachers, staff, and students on dealing with active shooter incidents provides more depth if trainers get promoted, leave the schools, or are reassigned. Having more instructors allows organizations to improve their knowledge base and expertise.

## Technology & Infrastructure Summary

This survey tool has identified a **moderate** level of preparedness in Technology and Infrastructure for the organization. The individuals responsible for Technology and Infrastructure should review the gaps identified by this survey and determine priorities for improving their program. The responsible parties should prepare a plan to determine which vulnerabilities identified should be addressed and which improvements have higher priorities. The organization should routinely review its Technology and Infrastructure to ensure it meets the needs of the organization in a proactive manner.

Specifically, the Technology and Infrastructure section has shown a need to:

- Consider a Master Security Plan or Physical Protection System Plan that integrates technology, procedures, and people. This is an excellent tool to create an effective security program. Monitoring whether the plan is working as designed can determine that a school's assets are properly protected. Ensuring the plan is functioning properly, through training and compliance monitoring, is essential to providing adequate protection.
- Make sure all school grounds and boundaries are clearly designated and identifiable from all directions. While a perimeter fence can provide a clear barrier to unauthorized access to school grounds, signage can also provide this needed demarcation as a warning to unauthorized trespassers. In addition, identifying the school's grounds may provide an additional psychological deterrent to potential adversaries.
- Fully implement the exterior grounds into the Emergency Operations Plan. This includes procedures and resources to protect all individuals on exterior grounds. Training and drills can ensure emergency procedures including lockdown, shelter-in-place, weather emergencies, evacuation, and reverse evacuations will protect individuals as designed. The exterior of a building may require a different response than the interior.
- Surround all playgrounds with a sufficient perimeter fence to prevent egress from the playgrounds. This can serve as means to prevent unauthorized access to students on the playground and elopement of students. The fence should have 360-degree coverage and be effective as a delay barrier.
- Consider surrounding school grounds by a perimeter fence. This can provide a clear barrier to unauthorized access to or escape from the school grounds. Fencing should provide complete 360-degree coverage to be effective as a delay barrier. Daily/Weekly/Monthly checks should be scheduled to ensure no gaps in the fencing exist or that repairs are quickly made.
- While CCTV coverage is available at the Billerica location, there is no system at the Tyngsboro site. Consider installing a CCTV coverage system at the location that can be viewed on-line by Administrators and provides evidentiary value.

- Consider installing monitoring stations to detect intrusion, suspicious activity, and egress issues. The detection and assessment of activity on the CCTV System can allow protective actions to be initiated. Ensuring that trained staff are assigned to monitor the CCTV system can greatly aid in detecting threats.
- Block vehicular access to playgrounds and extracurricular activity areas. This can help prevent intrusions, accidents, and injury. Ensuring that gates and barriers are secured and functioning properly is critical to prevent unauthorized vehicle access.
- Ensure that parking lots are adequately lit for safety and security. Proper lighting of parking lots and the buildings is essential to protect property and people by illuminating threats and hazards. Effective lighting may reduce criminal activities and provide additional deterrence value during periods of darkness. Detecting and reporting lighting outages in the parking area are necessary to ensure that lighting remains adequate.
- Secure access points for parking lots with gates and barriers when access is not authorized. Unauthorized access to parking lots can lead to many risks and hazards, such as reckless operation of vehicles, illegal drug transactions, etc.
- Consider bordering parking lots with walls, fencing, or other physical barriers. This can prevent unauthorized access. Identifying attempts to circumvent or defeat security barriers can be an indicator of unwanted activity or planning and preparing for later activity.
- Consider alarming exterior doors. This helps provide a layer of security to the perimeter of a building. While locking all doors is essential to preventing unauthorized access to the school and its occupants and assets it simply cannot be relied on to be fail safe. Doors that fail to close properly or are propped open can easily defeat any security measure. A door that is alarmed can indicate a breach, unauthorized egress, or just be an unsecured access point due to weather or oversight.
- Ensure that all exterior doors are numbered and identified by signage on the interior and exterior of the entrance. This can clearly identify doors for First Responders. Providing an entrance number that they should enter, or an entrance number near the threat can allow them to enter the facility where their presence may quickly resolve the incident or emergency.
- Ensure that the school interior complies with all life safety and fire code requirements. Deviations from the code can significantly increase risks and liability in the event of an incident.
- Consider installing NFPA 101 Life Safety Code compliant hardware that can be engaged by all room occupants to keep them safe in case teachers or staff members are incapacitated or not present. The ingress side should be accessible by administrators or First Responders without special tools, knowledge, or fine motor skills.
- Consider the use of shatter resistant film on classroom doors with glass windows or glass walls that can easily be breached by an intruder and make room occupants visible. The use of lockdown tactics are only effective if there is some type of physical barrier that is not easily breached and does not make room occupants visible.

- Ensure that all custodial areas, maintenance rooms, and tools are locked when not in use. These areas pose safety hazards if entered without supervision. In addition, many items and materials could be diverted to pose a threat especially if those accessing the area are not properly supervised.
- Ensure all emergency lighting, signage, and equipment is routinely inspected to ensure it is functioning properly. Discovering that systems are not functioning during an emergency or incident can increase the risk to staff, students, and school assets. Documentation of inspections can provide evidence that systems are functioning properly and can reduce liability for a school.
- Ensure fire extinguishers are inspected monthly by facility staff to ensure readiness. Individuals performing inspections should be trained to identify deficiencies that require maintenance. Documentation of inspections, including completion of the inspection tag on each extinguisher, provides evidence of proper maintenance.
- Ensure that there is adequate access to first aid supplies throughout the buildings. This is essential to ensuring that injured individuals can be treated in a timely manner. A routine inspection and replenishing schedule can ensure that First Aid Kits have the need materials during an emergency or incident.
- Ensure security cameras are installed to provide coverage of bus pick up and drop off locations. This is to include parent drop off and pickup locations. This could be essential in the case of an accident, finding a child who got on the wrong bus, or determining fault if someone strikes a person in these areas.
- Ensure security cameras are installed to provide coverage to all exits and entrances. Camera coverage can provide crucial information to identify intruders and students who may elope from the building. At minimum, recorded footage should be maintained for a time deemed adequate to allow for identification and investigation of an incident. Many locations consider 20 days of storage adequate for this function.
- Install panic alarms at key locations to summon assistance in emergency situations. Installing panic alarms at key locations, like the main office, is an essential tool allowing staff to request emergency assistance without alerting a threatening individual that assistance has been requested. Staff assigned to these locations should be trained and they should practice using these alarms.
- Connect panic alarms to local Law Enforcement. This may be the quickest method of notifying them that an emergency exists. This may improve response times of First Responders during an emergency or incident. The facility should confirm dispatchers monitoring alarms are provided with procedures for initiating a response following an activation. Utilizing the panic alarms during an exercise or drill to initiate a response can allow refinement of those procedures to improve future responses. Panic buttons also speed up response when persons are under duress. This is different than the one push lockdown button which indicates an already escalated problem.

- Determine if the school's technology and systems can provide real time updates to building occupants and First Responders to assist in the decision-making process. Cameras, access, and alarm systems can provide critical information. If that information can be shared in real time by PA systems or electronic alert systems it can allow for better decisions on how to protect themselves and others. Testing these systems under simulated conditions should be performed on a regular basis.
- Include in the EOP procedures for the evacuation of the cafeteria and areas for staff and students to seek shelter in place locations. Mitigating safety and security hazards can be accomplished by including common areas, such as the cafeteria in the plans for evacuation and shelter-in-place situations. These areas can be occupied by many students and staff, posing the risk that many students could be targeted at one place and time. Testing these plans by conducting drills or exercises while students are in the cafeteria, hallways, or other common areas can help to identify ways to improve the EOP.
- Ensure the Corporation has a formal IT disaster recovery plan. Loss of IT data can significantly disrupt school operations. Having a formal plan and testing it can prove invaluable in retrieving important data.
- Consider monitoring social media to learn about school related postings. Monitoring of social media sites to learn about postings related to the school can often uncover such information as threats, bullying, etc. which can allow for intervention to prevent the issue from escalating.
- Consider backing up IT data to an offsite location at least daily. This can reduce the risk of lost data due to fire or other disaster that can destroy the facility.
- Sign confidentiality agreements between the district and contractors addressing protections if a contractor releases personal data. Some cyber criminals are known to access private school data through contractors who do business with school by taking advantage of weak firewalls. Provisions should be included in contracts to address the risk.
- Protect the school against the introduction of malware (viruses, worms, and Trojan horses). Thumb drives that have not been virus scanned can introduce dangerous malware to the network. Requiring all foreign media be scanned first before auto running is a good measure to mitigate risk.

## Hazards & Threat Assessment Summary

This survey tool has identified a **high** level of preparedness for hazards that could impact the facility. Overall, there are some gaps in planning that could impact the facility. While it may be impossible to completely prepare for every scenario, hazard, and threat- it is possible to identify gaps and prepare for incidents that threaten the organization. Persons responsible for this area should determine which area take higher priority and start from there when planning. Assessors note: Scoring is affected by the level of risk presented by natural hazards, man-made accidental incidents, and man-made intentional incidents.

Specifically, the hazard and threat assessment section has shown a need to:

- Consider the use, as the organization grows, of an anonymous hotline whereby students and staff may report incidents or suspicious activities. Communicating the existence of a hotline and training students and staff to recognize warning signs of violent or unusual behavior can increase reporting.
- Consider developing a Risk and Vulnerability Assessment Program as an ideal tool for identifying risks and security weaknesses for a school. Risk and vulnerability assessments should be conducted on a regular basis to keep security and safety measures current. Changes to a school's population, policies, infrastructure, security technology, and evolving threats can increase or decrease the risk posed to a school. Current information is essential to making security decisions to reduce risk in a cost-effective manner.
- Utilize security procedures to protect security gaps if funding is not available to implement physical security improvements. If a vulnerability cannot be adequately secured do to budget or policy restrictions it is advisable to use available resources and changes in policies and operations to reduce vulnerabilities. As an example: A school that is unable to implement electronic access control on all the doors in the building could reduce the number of entrances that are authorized for use or utilize staff members to observe doors while they are unlocked.
- Utilize qualified security professionals in identifying risks and vulnerabilities at the sites. Security professionals specialize in identifying risks, security gaps, and in designing countermeasures to protect facilities and people. In addition, security professionals are normally unbiased third-party professionals that have no relationship with the site or persons working at them and thus have no preconceived ideas about needs or personalities.
- While most organizations prepare for major critical incidents like responding to an active shooter, many do not practice more likely incidents, such as a fielding a communicated threat and determine a course of action in response to it. Even traffic crashes from buses or a high-speed crash from a vehicle could have a critical component if not practiced and prepared for by administrators and staff.

## Prevention Programs Summary

This survey tool has identified a **moderate** level of risk prevention in the Prevention Programs section for this location. Incorporating protective security measures can potentially prevent and mitigate certain hazards. For example, having a Threat Assessment Team (TAT) in place with experience and expertise to review threats and behavioral indicators can help prevent an act of violence from playing out. Individuals responsible for prevention programs should review any vulnerabilities identified by this survey and determine priorities for improving them. The organization may also be exposed to other risk factors, not identified by this list that should be mitigating by additional prevention capabilities.

Specifically, the Prevention section has shown a need to:

- Develop a formal Threat Assessment Team (TAT) to evaluate warning signs from a potential offender to determine the credibility, capability, and intent of a potential offender, this is a common practice used to evaluate risks when a threat is received, or someone raises concerns about a potential offender believing they may be a threat. A TAT may rely on outside experts and law enforcement to evaluate potential threats. It is important that TAT members be formally trained on Threat Assessment, meet regularly, are well-versed on protocols and have a documented process for dealing with threats and indicators of violence.
- Implement an anonymous reporting system for students and staff to report suspicious behavior. Many times, persons are afraid to report a dangerous situation for fear the individual will identify them and retaliate. An anonymous reporting system allows for additional eyes and ears to report suspicious behavior and possibly prevent violence.
- Develop a comprehensive visitor policy and procedures for identifying, credentialing, and escorting visitors within the school. Vigilance in ensuring compliance with comprehensive visitor policies and procedures is required to prevent visitors from posing a threat to students and staff. Spot checks and tests of procedures can often identify if procedures are being followed properly. Often the presence of an effective security program can deter certain types of crimes and help identify criminal activities.
- Consider requiring all visitors to provide valid photo ID prior to entry. This is a great security measure to ensure that the school knows who is in the building. A security system for visitor entry can help identify fake identification and prevent a person from gaining access who should not be on the premises.
- Investigate violations of the process to ensure that key control for the facility is investigated properly. If the root cause of the violation can be identified, corrective measures can be taken to reduce the likelihood of future violations.

- Determine if staff members should be required to wear photo ID badges. Some schools are now requiring staff members to wear photo ID badges. Depending upon the size of the school, number of staff, and staff turnover rates this requirement may not be necessary. Staff being immediately recognizable to First Responders is another concern in implementing this policy. Staff who move between buildings, temporary workers, and substitutes should also be included in the policy or could separately be required to show ID because they are not familiar employees.
- Establish a policy and procedure for documenting deliveries on a log identifying the individuals, vehicles and packages delivered. This helps deter unwanted activity, provides a record of activity, and serves as documentation for investigations if an incident occurs.
- Establish a procedure for identifying and inspecting incoming deliveries and packages, including procedures for handling suspicious packages. A policy for handling suspicious packages can prevent major disruptions of the school. Staff who receive packages should be trained to recognize suspicious packages.
- Post signs to inform staff, students, and visitors that all items entering the school are subject to inspection. Posting such sign may deter someone with nefarious intentions from committing a crime. It also provides formal awareness of the policy to conduct inspections.

## Recovery Planning Summary

This survey tool has identified several gaps in the Recovery planning for the organization and rates it as **low**. The individuals responsible for Recovery planning should review the vulnerabilities identified by this survey and determine priorities for improving their efforts to recover from an incident or emergency. The organization should routinely review its Recovery Plan to ensure that it meets the needs of the organization following an incident. A comprehensive Recovery Plan tailored to the needs of the organization can reduce the impact and disruption caused by an event and assist personnel to return to normalcy.

Specifically, the recovery planning sections has shown a need to:

- Train and exercise administrators on the recovery plan. Administrators who are trained to implement the recovery plan and are familiar with activating it can be more effective in reducing the stress, emotional distress, and damage caused by an incident. It is advisable that Administrators are trained at least annually in this aspect of recovering from an emergency, more often if there is a major personnel change.
- Prepare draft messages and key information to make it easier for communications to the media and the public to occur in a timely fashion. This is a best practice and a valuable tool that allows representatives to communicate quickly and clearly. Representatives should understand that prepared messages may not predict every scenario or occurrence; this will require representatives to modify prepared messages to match the situation.
- Identify a Crisis Communications Consultant company to assist you during an incident if necessary. They are experts and can help you handle incidents which could prove critical if handled incorrectly. They can help you develop training for your own spokespeople, develop messaging and strategies for dealing with your crisis.
- Designate an off-site location to serve as a mass counseling location. This will allow counseling to begin more quickly and in a location not impacted by the crisis. Following a crisis at a school, survivors may be traumatized by returning to the site and the school may not be available due to damage. Ensuring that the off-site location is prepared for the counseling functions can make the process more accessible to survivors.
- Develop a recovery plan for an active shooter incident. Following an active shooter incident, a facility may be unavailable for continued use for an extended period. Initially the location will be treated as a crime scene and it may take days or weeks to process all evidence. The facility may also require extensive cleanup, including specialized services for biological and blood borne hazards. Repairs may also be required to remove damages caused by bullets, evacuation, or First Responders breaching areas of the building to stop the threat or rescue victims. Existing plans should consider all temporary use facilities and equipment, if possible.

Additional planning for staff/teachers/counselors that may not return to work must also be considered and properly planned for.

- This plan should also include identifying a new school site or temporary site if the decision is made to tear the building down. Past incidents have proven to be so traumatic that a decision was made to knock down the building and build a new facility. In this event it would be months or longer before the building would be finished.
- Develop a plan for cleanup and repair of the school after any type of likely incident or disaster. Identifying contractors and retaining them may make it easier to reach advantageous contractual agreements instead of negotiating in the aftermath of an emergency. This will also make it easier for the contractor to comply with school contracting policies.
- Develop transportation measures to ensure students and staff can safely reach the reunification site. This is especially critical since the bus garage is situated on the District campus and may be unavailable due to the incident. The ability to transport students and staff to a reunification site can decrease disruption and trauma caused by the incident. Exercising and drilling a transportation plan can identify means of improving the plan prior to the need to conduct a reunification plan following a crisis.
- Maintain an inventory/video/photo of equipment that can be provided to an insurance company to file claims after an emergency. Having this information and proof will save a significant amount of work when filing a claim with your insurance company.
- Put in place plans to deal with memorials and services in the aftermath of staff and/or students necessary to deal with this part of the recovery process. Plans to deal with informal memorials need to decide what to do with items left at the memorial, how long it will remain in place, how to communicate removal, determining family wishes, etc. Services must be planned in large venues, potentially even outdoors. Determine how the school will be impacted if not everyone wishes to attend- busing, substitutes, and crisis counseling staff for those attending.
- Review insurance policies for gaps in coverage. Some clients have believed they were covered for pandemic response or gun violence, only to find out they had no coverage in the aftermath of an event. Research with your insurance agent possible areas that would cause gaps in coverage if you were to suffer a critical event.

## Options to Consider

This section of the report will break down the Risk Assessment Recommendations into Comprehensive Organizational Level Recommendations and then Recommendations for each School.

As it may be difficult, if not impossible, to mitigate every vulnerability immediately it is recommended to divide security and emergency operations enhancements into three parts: short-term, mid-term, and long-term. There are several factors that should be weighed simultaneously when the organizational leadership considers the choice of security improvements. Among these are the cost, impact on operations, installation requirements, and the greatest return on the investment.

### ORGANIZATIONAL LEVEL

#### Short-Term Considerations

**Recommendation #1:** Institute a formal monthly fire extinguisher inspection. There is a lack of preventive maintenance in this area. A mapping survey of every buildings extinguisher locations should be undertaken. This will allow every extinguisher to be inspected monthly by each school and not miss a location. This check is required in NFPA 10, the Standard for Portable Fire Extinguishers, in addition to the yearly servicing.

- A) A monthly inspection of all fire extinguishers is also required by NFPA 10. This inspection can be conducted by staff and requires no professional certification. The following is a set of guidelines and does not encompass the entire fire code on this subject.

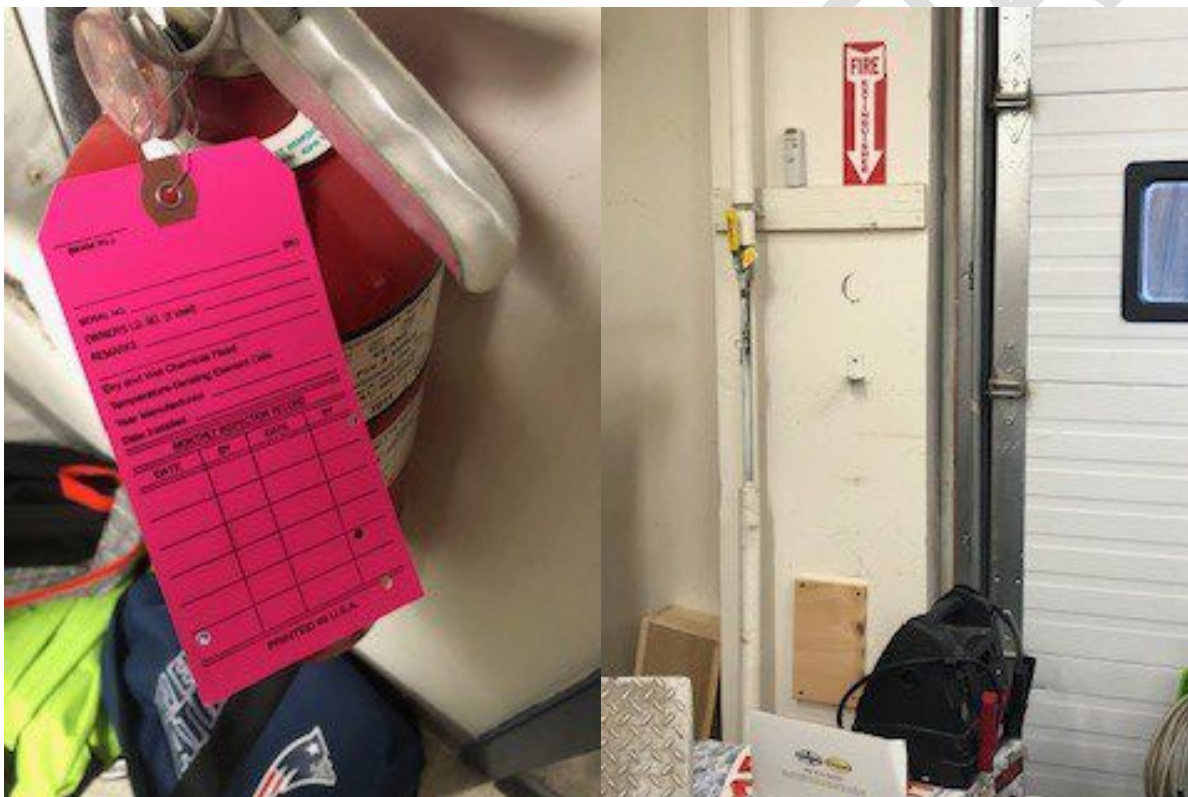
Portable fire extinguishers are required to be visually inspected when initially placed in service and at least monthly thereafter. These visual inspections, intended to help ensure that each extinguisher is in its designated place and will operate if needed, can be performed by facility staff.

A pressure gauge in the “normal” or “operable” range is not a 100 percent guaranty that the extinguisher will perform as intended. A broken seal, for example, may be an indication that someone has used the extinguisher and discharged a portion of the contents too small to affect the pressure gauge. NFPA 10, Standard for Portable Fire Extinguishers, therefore, requires that the monthly inspection verify several things including:

- Confirm the extinguisher is visible, unobstructed, and in its designated location.
- Verify the locking pin is intact and the tamper seal is unbroken. Examine the extinguisher for obvious physical damage, corrosion, leakage, or clogged nozzle.

- Confirm the pressure gauge or indicator is in the operable range or position and lift the extinguisher to ensure it is still full.
- Make sure the operating instructions on the nameplate are legible and facing outward.
- Check the last professional service date on the tag. (A licensed fire extinguisher maintenance contractor must have inspected the extinguisher within the past 12 months.)
- Initial and date the back of the tag.

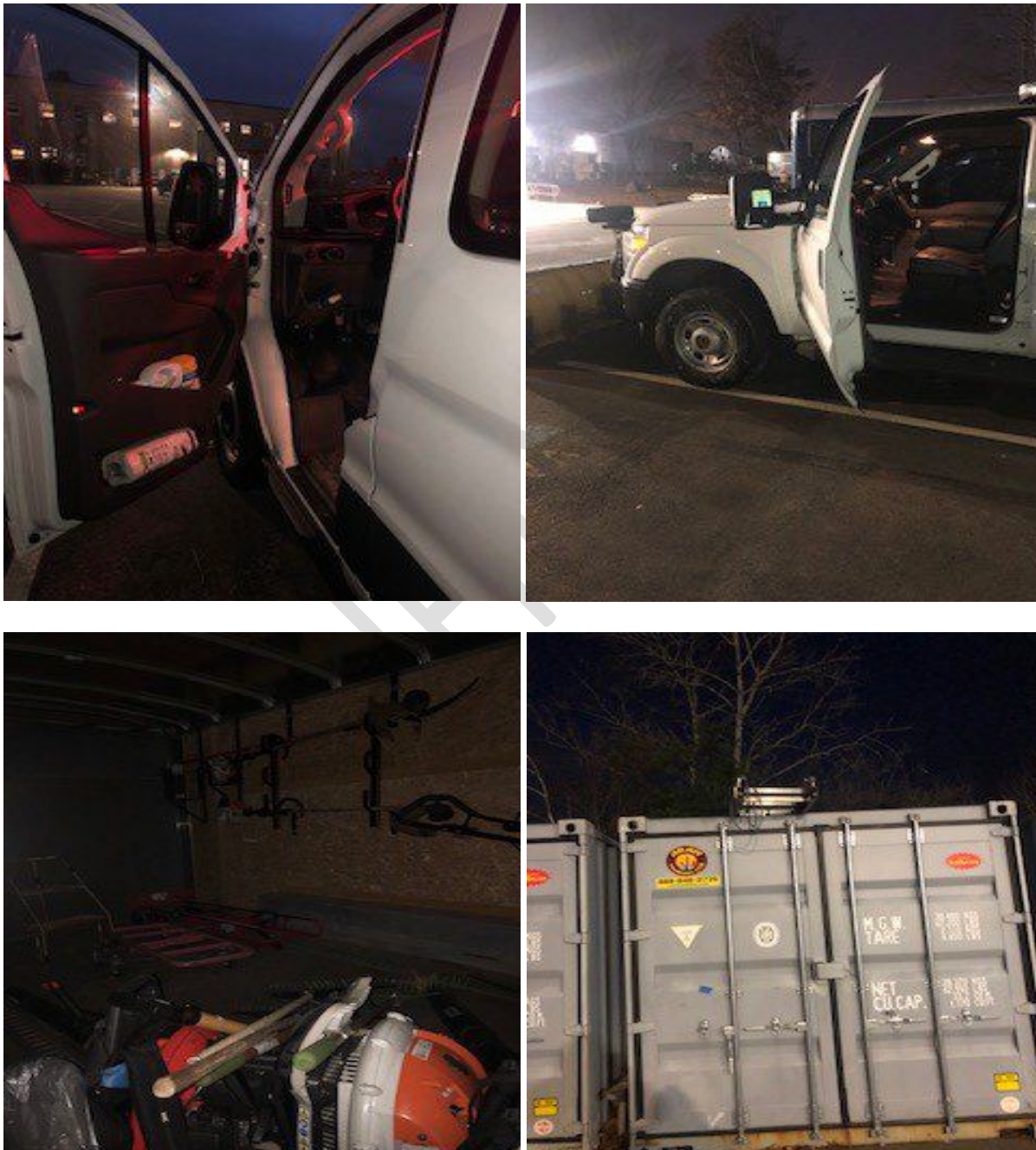
Report expired service tags and missing, damaged or used extinguishers immediately so they can be serviced. Following photos show the missing checks.



**Recommendation #2:** Ensure that all equipment is stored properly, and that electrical boxes and fire safety equipment are not blocked. This can lead to problems accessing emergency shutoffs and blocked electrical boxes can lead to arcing of electricity resulting in fires, injury, or death. This was an issue in both buildings.



**Recommendation #3:** Check the perimeter of the buildings for minor issues that could cause larger problems if not addressed. A quick perimeter and parking lot check should be done nightly. Minor oversights like vehicles not been locked, ladders being left out, storage containers being unlocked, or critical infrastructure being left unsecured can lead to damage to property and monetary losses. Access onto roofs can lead to damage to air handlers and potential injury to unauthorized persons.





**Recommendation #4:** Utilize the Incident Command System (ICS) and National Incident Management System (NIMS) to support effective decision making and response. Administrators and staff who can utilize the ICS can utilize the system during drills, exercises, and incidents. This will allow them to gain experience in applying the principles of ICS and enable them to operate more effectively in a future emergency. This is recommended best practice from FEMA and DHS. All personnel that may find themselves involved with emergency planning, and response or recovery efforts should be trained to a minimum IS-100.C: Introduction to the Incident Command System, ICS 100 available online at <https://training.fema.gov/is/courseoverview.aspx?code=IS-100.c>

**Recommendation #5:** Consider expanding the number of people trained in CPR, AED, and First Aid (including Stop the Bleed training).

- Establish Training protocols throughout the organization consistent with the Hartford Consensus (<https://www.facs.org/about-acs/hartford-consensus>) which recognizes that uncontrolled bleeding is the most significant preventable cause of death in the pre-hospital environment; it also suggests that all responders, both civilian and professional, should be educated and equipped to control hemorrhaging and finally encourages civilian bystanders to act as “immediate responders.” Nationally, this training is known as Stop the Bleed training, and information can be found at <https://www.stopthebleed.org>.
- Consider storing CAT T style tourniquets, especially in shop rooms and with first aid kits. The CAT T tourniquet allows for true 1-handed operation, proven to be 100% effective in occluding blood flow in both upper & lower extremities by the U.S. Army’s Institute of Surgical Research, the design facilitates faster application in traumatic incidents, and training programs are simplified through a single protocol for all applications. Additional information may be found in the following locations:
  - [https://www.narescue.com/downloadable/download/sample/sample\\_id/141](https://www.narescue.com/downloadable/download/sample/sample_id/141)
  - [https://www.narescue.com/downloadable/download/sample/sample\\_id/17](https://www.narescue.com/downloadable/download/sample/sample_id/17)
  - [https://www.narescue.com/downloadable/download/sample/sample\\_id/21](https://www.narescue.com/downloadable/download/sample/sample_id/21)
  - <https://www.stopthebleed.org>
  -

**Recommendation #6:** Consider Training select staff in Behavioral Threat Assessment and forming a Threat Assessment Team. These teams are focused on recognizing and helping distressed students before their problems escalate into violence against others or themselves. Navigate360 offers this training in a blended learning delivery model in collaboration with Dr. Dewey Cornell utilizing the CSTAG model. The course is 6.5 hours and uses an 8-module eLearning course with a Team workshop and virtual training. This is a product that is offered by Navigate360.

**Recommendation #7:** Consider training for front desk staff in verbal de-escalation. An excellent training in this area is Crisis Intervention Training through NAMI (National Alliance on Mental Illness) focused on helping people who are suffering in a mental health crisis. While many administrators and teachers receive training in this area, many staff persons who deal with people in crisis are sometimes left out. Training these staff members in de-escalation early on in an event can prevent situations from growing worse.

**Recommendation #8:** All persons working traffic details should be required by policy to wear orange or yellow traffic vests. Persons working the traffic line should be equipped with Flashlight Traffic Wands to make them more visible to drivers. The goal is to make them as visible as possible to all drivers and help drivers immediately identify persons who are helping load buses and cars. The goal is to prevent injury and crashes, expedite drop off and loading, and take all actions possible to protect staff during these critical times. Photos of flashlight and vest are provided as example's and are not a product endorsement.



### Mid-Term Consideration

**Recommendation #9:** Sign Memorandums of Understanding (MOU's) with Rally Points and Notification and Incident Assistance Centers. This spells out the understanding that these locations will be utilized during critical events, what services will be provided, and what expectations will occur between both parties. These are agreed upon items in a formal legal document approved by both parties. The current plan includes these locations, but there are no formal agreements.

## Long-Term Considerations

**Recommendation #10:** The building assessments discovered no suppression system in school IT rooms. Due to the amount of heat caused by these rooms, there is a risk of fire. But, due to the sensitive nature of the electronics contained within them, water suppression systems are not recommended. There are several Clean Agent Systems that are colorless, odorless, electrically non-conductive, leave no residue, and are safe for people. These agents interrupt the chemical chain of the fire without damaging sensitive equipment, electronics, or high value assets. Should district decide to pursue this recommendation, it is recommended that this upgrade be sent out for RFP. Standards and recommendations for the protection of information technology systems can be found in NFPA 75: Standard for the Fire Protection of Information Technology Equipment. This publication can be downloaded free at <https://www.nfpa.org/codes-and-standards/all-codes-andstandards/list-of-codes-and-standards/detail> and then placing “code 75” in the search box.

**Recommendation #11:** Install additional cameras in the High School parking lot to better capture outside areas in the lots. Additional cameras are needed to capture bus and parent drop-off/pick-up areas. This is currently an internal function of the Organization and they maintain their own servers. It is advisable that this be sent out for RFQ (Request for Quotation) to see if the service can be farmed out to an outside professional company who can service the cameras, provide storage space at a cheaper price, and make a professional survey of the Elementary School for further camera placement. The system should be able to be viewed by Administrators offsite and have at least 20 days of storage capability.

**Recommendation #12:** Consider the use of a Visitor Management System. The system should conform to your existing policies and integrate with your student information system. The system should vet all visitors and contractors working in the schools and send security alerts and notifications to staff and guardians. Should be able to scan all US ID's, conduct Sex Offender checks, and utilize custom blacklist/ Restriction lists. Navigate360 does have this product. If you are interested please notify your contact person for a demonstration.

**Recommendation #13:** Consider the use of Safety and Security film. This film should be used to reinforce the glass panels in classroom doors and walls. The use of Safety and Security film would improve the level of protection. While the film is not bullet proof, it does provide an effective time barrier. Doors and windows from lobby areas into the main part of the building are also excellent areas to install the film. Make sure that the film is installed properly in the frame of the window or door.



**Recommendation #14:** Consider the use of panic buttons at all main office desks and/or in administrator offices. Many times, during incidents, front office personnel and administrators are dealing with upset parents, students or persons trespassing on the premises. This does not allow them to use phones to call for assistance. Having a panic alarm that allows them to summon assistance provides peace of mind and can get emergency responders in route before a phone call can be made. These alarms should ring into law enforcement ideally or a 24/7 Alarm Services Company. They should be tested periodically and personnel accessing them should be trained in their proper use.

**Recommendation #15:** Replace all hard keys with a programmable keyless entry system. Current keyless entry systems have several advantages over hard keys. They do not require fine motor skills during an emergency, if lost the lock does not have to be rekeyed, cards can be simply shut off if not returned due to the person being fired or quitting, doors can be programmed to lock and unlock, it removes the need to carry large amounts of keys, you can track who is entering the location, etc.

Another consideration is the smart lock technology where doors are unlocked using a programmed phone app. While this technology is relatively new, the Organization should begin exploring it now as most major door manufacturers are moving toward this technology and it may be ubiquitous when the facilities are ready to switch over.

Another excellent feature of this type of system is that the district can keep track of entry records for classrooms and buildings. Durable, high classroom security mortise locks should be utilized, preferably with a deadbolt function if allowed by the AHJ. This should be sent out for RFP by the district to get best pricing and product. Photos of a Proximity Card Access Lock are provided as examples and are not a product endorsement.



## **High School/Middle School**

### **Short-Term Considerations**

**Recommendation #1:** Remove all debris around the perimeter of the building. This broken picnic table was discovered near the physical exercise equipment. It appears to have been left outside for some time and can lead to injury and is an eyesore to the property.



**Recommendation #2:** While the issue of parking lot checks was addressed for the Organization as a comprehensive recommendation for both sites, this location had 19 unlocked organization vehicles on the property. This can lead to theft, damage, and unauthorized entry. All vehicles should be checked and locked nightly.

**Recommendation #3:** Utilize Crime Prevention Through Environmental Design (CPTED) concepts in landscaping the property. Landscaping, as an element of CPTED can be used as an effective tool in deterrence, detection, and delay of intruders. In fact, in this instance, a simple landscaping change may eliminate the need for a more expensive solution by increasing natural surveillance over camera surveillance. Currently, bushes in the front of the property would provide concealment from natural surveillance of persons exiting the property, especially at night. Under CPTED principles, bushes and other plant growth should be no higher than three feet. Tree canopies should be trimmed to at least seven feet above grade level. Additionally, climbing vines were observed on the building. This can cause infrastructure damage to windows and roofs if they grow high enough and should be removed. The following photos are of current foliage in front of the facility which should either be trimmed down or replaced with lower foliage.





**Recommendation #4:** Conduct checks of first aid kits for expired items and expired EPI pens. The School should consider having Commercial First Aid Cabinets that are easily restocked and items that are visible without having to dig through cabinets. Inventory for restocking and expired items should always be done in the spring so that items can be re-ordered over summer and be in place for fall. Items that expire during the school year should be tagged in the inventory for replacement during the school year. Photo of cabinet is included as an example.



**Recommendation #5:** Secure the Facilities Room when it is unattended. I was able to enter the room right after school started and staff members were in the area. Due to the number of tools and critical infrastructure in the room, it is recommended a first aid kit be kept in the room and that it includes a tourniquet.

### Mid-Term Consideration

**Recommendation #6:** Install two parking lot light polls to illuminate the front and rear parking lots along the tree line where Organizational vehicles are parked. These light polls should utilize LED lighting. The areas are currently dark given winter conditions, and I would imagine they would be darker when the trees have foliage. This lighting improves natural surveillance and can act as a deterrent to trespassers. These light poles would also be excellent locations for cameras to observe the parking lot.



## Long-Term Consideration

**Recommendation #7:** Move all students with medical issues to the first floor to improve evacuation options and make emergency response easier and more effective. My experience with previous similar facilities used this setup, especially since the elevator cab configuration does not accommodate an open ambulance stretcher. Since the building was not originally designed as a school and because the second floor was occupied first, the current arrangement of classrooms and students is understandable. If the current arrangement is maintained, then the recommendation is to replace the current elevator with a Fire Services Access Elevator (FSAE) with Star of Life signage that accommodates a 24" x 84" open stretcher in the open position. Even though the building is not four stories, this complies with the recommendation for a taller building covered in the International Building Code (IBC) section 3002.4. I believe this would be prudent given the student population and the medical concerns on the floor.

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## Elementary School

### Short-Term Considerations

**Recommendation #1:** Ensure that all lighting is working on the grounds. Several perimeter doors leading into classrooms lights were out. Some that were still working appeared to have incandescent bulbs. All lighting should be updated using LED (light-emitting diode) bulbs which emit light up to 90% more efficiently than incandescent bulbs. Additionally, there was one area at the rear of the building that was very dark and had no illumination. It is located on the Southwest corner of the building. The recommendation is to install a spotlight in this area to illuminate the perimeter.



**Recommendation #2:** Remove items that can be used to access critical infrastructure from the grounds and properly secure them in storage areas. These trash cans are placed directly next to a fence that is intended protect critical infrastructure and provide an opportunity to use them to scale the fence.



**Recommendation #3:** During interviews, staff remarked that they would like more general intruder training. This would range from dealing with persons who present a threat down to persons who have entered the building and are lost. While active shooter training is covered, there seems to be a need for response training to less serious building incursions such as an irate parent/guardian at the front desk.

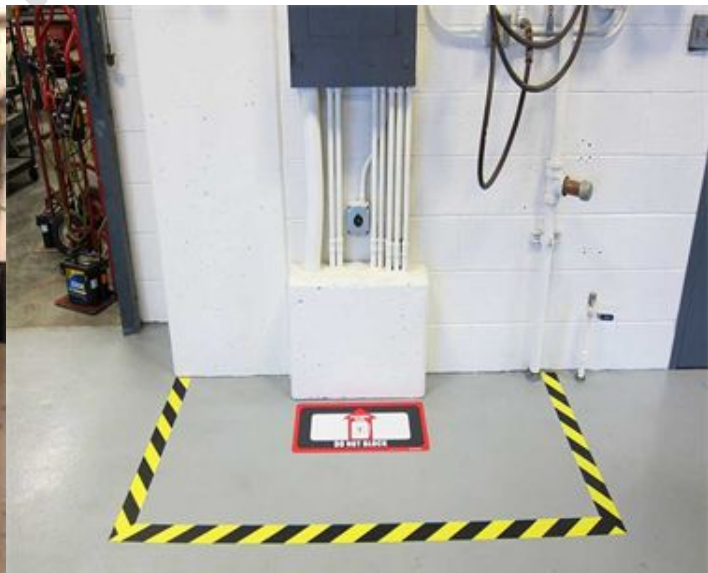
**Recommendation #4:** According to U.S. Flag code, it is universal custom to fly the American Flag from dawn to dusk. A flag may be displayed twenty-four hours a day if properly illuminated during the hours of darkness. The current area is very dark around the flag. Consider illuminating the flag. The photo of the current flag was taken with flash photography. Second photo is an example of such lighting.



**Recommendation #5:** Ensure all Janitorial closets are closed and locked. Cleaning chemicals, water, and cleaning tools could all be mishandled by students and can cause serious injuries, illness, or death. Locking these areas when not being used prevents accidents from occurring.



**Recommendation #6:** Properly store all materials and do not block electrical cabinets and shutoffs. In addition to this being a Fire Code Violation, this practice can be dangerous. Electrical arcing from the cabinets to other metal objects can lead to accidental electrocutions. Code stipulates a clear area in front of these cabinets of 36 inches. Taping the floor (photo provided as an example) is a good way to prevent accidental storage issues.



**Recommendation #7:** After being told the site has no cameras I observed the below sign on the on playground. I asked the if there was a camera as I was unable to see a camera anywhere. I was told that no one knew of a camera covering the playground. This type of signage is occasionally installed to discourage criminal actions based on them thinking they are being recorded. An experienced criminal will quickly ascertain there are no cameras in the area and be emboldened to commit a crime.

The main problem, however, is that this type of sign creates a liability issue for the organization. An example of this would be a child is abducted from the playground. The parent asks for a recording of the abduction and finds out the sign is false and sues the school claiming they believed that they believed the sign and the appearance of safety it created in choosing to send their child to the school. They will claim that the posted sign and the appearance of safety created a false sense of security and sue for negligence.

The recommendation, if there is no surveillance system, is to remove the sign until such system is installed.



**Mid-Term Consideration:**

**Recommendation #8:** Stairs that are used as exit routes are beginning to crumble from age and weather. This presents a trip and fall hazard (the most likely type of lawsuit a facility can face). It is recommended that the school work with the city to repair these steps. Additionally, the hand railing is loose exiting door number 17 and appears it will soon come loose from the concrete. The railing on the other side of the stairs is already missing.



**Recommendation #9:** Install door alarms on all exit doors from classrooms and hallways, except for the front doors which are always monitored. Staff remarked that students have run from the building and have had to be chased by staff. Having an audible alarm system on doors will not only indicate that a student may have eloped, but it will alert other staff members that an incident has occurred and that their assistance may be needed to track the student down or assist with other students. Meet with the Authority Having Jurisdiction (AHJ) before deciding on what system to use, as you may be able to install delayed egress panic bars that fail safe during an actual fire alarm. Delayed egress is an option allowed by NFPA 101. In 2018, the International Building code was revised to allow delayed egress locks in classrooms with an occupant load of less than 50 people.



### Long-Term Considerations:

**Recommendation# 10:** Consider the use of protective bollards in the Parent Dropoff/ Pickup area at the front School entrance. Vehicles can enter the passenger drop-off/pick-up area at this location and have a direct path into the pedestrians and the building. There is also a risk of weather-related accidents where ice could result in a vehicle sliding down the drive and entering the pedestrian area/striking the building. The recommendation is to use bollards that are certified, equivalent, or engineered to an M30 or K4 rating with a height of 36". These will stop a 15,000 lb. vehicle traveling at 30 MPH. Photograph of Bollards is included as an example and is not a product endorsement.



**Recommendation #11:** After walking the property, I was concerned with the lack of sufficient fencing to stop students from egressing the property. A student who flees from the building can quickly be in traffic on Coburn Road or Lakeview Avenue. A student could flee into the wooded area to the east of School, but even more concerning is that they could flee west and fall into the body of water next to the school. Fencing in that area has been damaged by falling trees and it is unknown how deep the water is, though not much water depth is necessary for drowning to occur.

The recommendation is to install fencing that encompasses the entire property and to install three vehicle gates, two at the front of the building and one at the rear of the building giving access to the school by Poplar Avenue. Alarmed delayed egress man gates should be placed at intervals in the fence line in case the grounds need evacuated and vehicle gates cannot be accessed due to the threat location. Fencing should be no climb in design. Photos of the current area are followed by example photos of fencing and gates. This should help solve two problems at once- the problem of student egress and ingress onto the property by trespassers.







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**From:** [Glen Costello](#)  
**To:** [Chris Scott](#)  
**Cc:** [Donna Suarez](#); [Joia Mercurio](#); [Kari Morrin](#); [Heather Valcanas](#); [Sandra Morency](#); [Dale Bragan](#)  
**Subject:** RE: [EXTERNAL] Risk Assessment PDF  
**Date:** Wednesday, February 10, 2021 7:41:44 AM

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Thank you.

I didn't highlight this in our last meeting, all distracted by numbers and all ... but I think this observation speaks to what Valley is

The culture I observed would best be described as “observant”, “kind”, “empathetic”, and “engaged”. There was a genuine, positive connection between staff members. It was nice to see staff members joke and be casual with each other while still being professional. While no situation is ever perfect, the atmosphere of the schools was bright and encouraging. There was genuine concern for staff and students, and it seemed as if the organization was working toward a common goal rather than operating as independent domains. (page 7)

Best,  
Glen Costello M.Ed.  
Assistant Principal  
STEM Lead  
Valley Collaborative  
40 Linnell Circle  
Billerica MA 01821  
978-528-7830

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## Central Administration Office

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

### MEMORANDUM

To: Valley Collaborative Board of Directors  
From: Dr. Chris A. Scott, Executive Director  
Jessica Scalzi, Lead Nurse  
Date: April 29, 2021  
Re: COVID-19 Update

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As of Wednesday April 28<sup>th</sup>, there are two cases of COVID-19 within our Valley Collaborative community and no classrooms are quarantined at this time. There have been no close contacts in those cases.

Valley nurses are continuing to offer rapid BinaxNOW testing in school for symptomatic staff and students. This has been a great resource for our families and staff by providing quick access to testing.

#### Vaccine Update

Around 33% of Valley Collaborative staff have been fully vaccinated. 10 High School Students/DDS Individuals have been fully vaccinated against COVID-19. Other students have already received their first dose. We expect more to be fully vaccinated as the general public vaccination has opened since April 19<sup>th</sup>.

#### **Required Action:**

None

#### **Attachments:**

None

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



## Central Administration Office

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

### MEMORANDUM

To: Valley Collaborative Board of Directors  
From: Dr. Chris A. Scott, Executive Director  
Date: April 29, 2021  
Re: Communications

---

The following communications are attached for your review:

#### State Agencies

- DESE FY'20 Annual Report Approval Letter
- DESE FY'20 Annual Independent Audit Report Approval Letter
- Email from Jarrod Douglass, DDS Human Services Coordinator

#### MOEC Update

- MOEC Board Meeting Agenda – March 8, 2021
- MOEC Finance Committee
- MOEC Ethics Committee
- MOEC By-Laws and Policy Committee

#### Community and Staff

- Email from Adam McCusker, Game Time Sports and Fitness Owner
- February 2021 Elementary School Monthly Newsletter
- Black History Month Lean On Me Video



## Central Administration Office

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

### MEMORANDUM

To: Valley Collaborative Board of Directors  
From: Dr. Chris A. Scott, Executive Director  
Date: April 29, 2021  
Re: Communications – State Agencies

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The following communications are attached for your review:

#### State Agencies

- DESE FY'20 Annual Report Approval Letter
- DESE FY'20 Annual Independent Audit Report Approval Letter
- Email from Jarrod Douglass, DDS Human Services Coordinator

#### Required Action:

None

#### Attachments:

DESE FY'20 Annual Report Approval Letter  
DESE FY'20 Annual Independent Audit Report Approval Letter  
Email from Jarrod Douglass, DDS Human Services Coordinator



Jeffrey C. Riley  
Commissioner

## **Massachusetts Department of Elementary and Secondary Education**

75 Pleasant Street, Malden, Massachusetts 02148-4906

Telephone: (781) 338-3000  
TTY: N.E.T. Relay 1-800-439-2370

February 19, 2021

Dr. Chris Scott, Executive Director  
Valley Collaborative  
40 Linnell Circle  
Billerica, MA 01821

### **Re: The Valley Collaborative FY20 Annual Report**

Dear Director Scott:

Thank you for the submission of the Valley Collaborative (Valley) FY20 Annual Report. We have reviewed your submission to determine its compliance with the reporting requirements of M.G.L. c. 40, § 4E and CMR 603 CMR 50.00, and we ask that you share this communication with your board of directors at their next meeting. If additional documentation is required, it is noted at the end of this letter. Your submission has been reviewed for the following:

**Information on the programs and services provided by the collaborative.**

*Your response meets the requirement.*

**Discussion of the cost-effectiveness of all programs and services.**

*Your response meets the requirement.*

**Progress made toward achieving the objectives and purposes set forth in the collaborative agreement.**

*Your response meets the requirement.*

**Evidence of approval of the annual report by the collaborative board of directors.**

*Your response meets the requirement.*

**The annual report is located on the Valley website with the annual independent audit report.**

*Your collaborative has met this requirement.*

Should you have questions about this letter, please email the [Education Collaborative Team](#).

Sincerely,

A handwritten signature in blue ink that reads "Paulajo Gaines".

Paulajo Gaines, Collaborative Coordinator

c: Valley Collaborative File



Jeffrey C. Riley  
Commissioner

## **Massachusetts Department of Elementary and Secondary Education**

75 Pleasant Street, Malden, Massachusetts 02148-4906

Telephone: (781) 338-3000  
TTY: N.E.T. Relay 1-800-439-2370

February 5, 2021

Dr. Chris Scott, Executive Director  
Valley Collaborative  
40 Linnell Circle  
Billerica, MA 01821

### **Re: Valley Collaborative FY20 Annual Independent Audit Report**

Dear Dr. Scott:

Thank you for the submission of the Valley Collaborative (Valley) FY20 Annual Independent Audit Report. We appreciate your efforts to fulfill this requirement, even with the many unanticipated disruptions and postponements to meeting schedules, that were caused by the COVID-19 crisis. This letter confirms that we have reviewed your submission to determine its compliance with the reporting requirements of M.G.L. c. 40, § 4E and CMR 603 CMR 50.00. We ask that you share this communication with your board of directors at their next meeting.

**Reporting Requirements** per M.G.L. c. 40, § 4E(d), please provide the:

- **Names, duties, and total compensation of the five most highly compensated employees.**  
*Your response meets the requirement.*
- **Transactions between the collaborative and any related for-profit or non-profit organization.**  
*Your response meets the requirement.*
- **Amounts expended on services for individuals aged 22 years and older.**  
*Your response meets the requirement.*
- **Amounts expended on administration and overhead.**  
*Your response meets the requirement.*
- **Any accounts held by Valley that may be spent at the discretion of another person or entity.**  
*Your response meets the requirement.*
- **Transactions or contracts related to purchase, sale, rental or lease of real property.**  
*Your response meets the requirement.*

#### **603 CMR 50.08(2)**

- **Evidence of approval of the collaborative independent audit by the Valley Board of Directors.**  
*Your collaborative has met this requirement.*

- **Audit Report is posted to collaborative website**

*Your collaborative has met this requirement.*

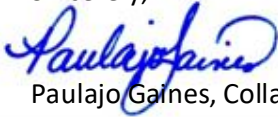
**Cumulative Surplus:**

Per statute and regulation, the reported FY20 cumulative surplus of 27.75 percent exceeded the maximum allowable limit on the amount of cumulative surplus revenue that may be held by the collaborative at the end of a fiscal year **M.G.L. c. 40, § 4E(c)(3)** and **603 CMR 50.07(9)**. You have reported that subsequent to June 30, 2020, but prior to issuance of the financial statements the Valley board of directors voted to return the excess surplus in the amount of \$600,000, to member districts.

In addition to our review, we have made your submission and a copy of this letter, available to the Audit and Compliance unit of the Department. Staff from that unit may be in touch with you if they require further information.

If you have any questions about this letter, please email [Education Collaborative Team](#).

Sincerely,

A handwritten signature in blue ink, appearing to read "Paulajo Gaines".

Paulajo Gaines, Collaborative Coordinator

c: Valley File  
Audit and Compliance

**From:** Marshall, Tom (DDS) [<mailto:tom.marshall@state.ma.us>]  
**Sent:** Friday, March 26, 2021 1:30 PM  
**To:** Heather Valcanas <[hvalcanas@valleycollaborative.org](mailto:hvalcanas@valleycollaborative.org)>  
**Subject:** [EXTERNAL] Fwd: T&T Individual

**This email came from someone outside Valley Collaborative. Please use caution when clicking on any links or images in this message.**

I thought I would share this with you see below we certainly appreciate and applaud your efforts have a good weekend

Begin forwarded message:

**From:** "Douglass, Jarrod (DDS)" <[jarrod.douglass@mass.gov](mailto:jarrod.douglass@mass.gov)>  
**Date:** March 26, 2021 at 1:09:06 PM EDT  
**To:** Matthew Gentile <[mgentile@valleycollaborative.org](mailto:mgentile@valleycollaborative.org)>, Holly Tierney <[htierney@valleycollaborative.org](mailto:htierney@valleycollaborative.org)>  
**Cc:** Joseph Venskus <[jvenskus@valleycollaborative.org](mailto:jvenskus@valleycollaborative.org)>, "Stoddard, Joanne (DDS)" <[joanne.stoddard@mass.gov](mailto:joanne.stoddard@mass.gov)>, "Marshall, Tom (DDS)" <[tom.marshall@mass.gov](mailto:tom.marshall@mass.gov)>  
**Subject:** T&T Individual

Hello team Valley,

I was not sure who to direct this email to, so it is going to all three of you for now.

I wanted to let you know that I had a long phone call with the parent of a T&T Individual today, and she could not speak highly enough about Valley and the support that her son is receiving.

Although he is completely virtual at this time, she made a point of telling me that she overhears the ZOOM classes, and said that the staff and job coaches running his groups are always respectful and do a great job of getting participation and responses from the folks participating. She said that everyone has such a great approach, and give great positive feedback to the individuals, that she knows her son and his peers are being heard and valued.

Just a nice little boost on a Friday afternoon.

Have a great weekend.

Jarrod Douglass  
(he/him/his)

Human Services Coordinator  
Department of Developmental Disabilities  
Lowell Area Office  
55 Technology Drive, Suite 202  
978-322-4311 (direct office line)  
978-880-4729 (cell)  
978-970-0468 (fax)  
[Jarrod.Douglass@mass.gov](mailto:Jarrod.Douglass@mass.gov)



## 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: April 29, 2021  
Re: Communications – MOEC Update

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Valley volunteers its professional support to MOEC. The attached highlighted agenda illustrates some of the recent Statewide leadership provided by Valley's Executive Director.

- Chair - MOEC Finance Committee
- Chair - MOEC Ethics Committee
- Chair - MOEC By-Laws and Policy Committee
- MOEC Treasurer

### Required Action:

None

### Attachments:

None

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

Massachusetts Organization of Educational Collaboratives



**MOEC Board Meeting  
March 8, 2021  
8:45 Coffee and Conversation, 9:00 meeting begins  
Zoom Video Conference**

|       |                                                                                                                                      |
|-------|--------------------------------------------------------------------------------------------------------------------------------------|
| 8:45  | Coffee and Conversation                                                                                                              |
| 9:00  | Welcome and Executive Director Report ( <a href="#">DOCUMENT 2</a> )                                                                 |
| 9:05  | Approval of February Meeting Minutes ( <a href="#">FOLDER 1</a> )                                                                    |
| 9:10  | By-Laws and Policy Committee Report                                                                                                  |
| 9:25  | Follow-up and Next Steps in Addressing Possible Collaborative Dissolution                                                            |
| 9:45  | Finance Committee Report                                                                                                             |
| 10:15 | Treasurer's Report ( <a href="#">FOLDER 3</a> )                                                                                      |
| 10:30 | Cumulative Surplus Discussion--responses to questions and potential need for increase in the 25% cap.                                |
| 10:40 | Pooled testing barriers                                                                                                              |
| 10:50 | Diversity, Equity, and Inclusion                                                                                                     |
| 11:00 | Legislative Committee Report<br><i>An Act relative to providing a COVID 19 retirement credit to essential public-sector workers.</i> |
| 11:15 | Regional Liaison Reports                                                                                                             |
| 11:30 | Report of the Special Commission on Improving Efficiencies in Student Transportation                                                 |
| 11:45 | Preparing for Legal Issues Conference                                                                                                |
| 12:00 | Safe and Supportive Schools Commissions Report ( <a href="#">FOLDER 4</a> )                                                          |
| 12:30 | Adjourn                                                                                                                              |



## Central Administration Office

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

### MEMORANDUM

To: MOEC Board of Directors  
From: Dr. Chris A. Scott, Ph.D. Treasurer  
James George, CPA, CVA, JD, Accountant  
Gail DeGregory, Accounting Manager  
Date: March 8, 2021  
Re: Update through January 31, 2021

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We are pleased to report that the Massachusetts Organization of Educational Collaboratives (MOEC) had a strong operating year in 2020. This memo highlights some of the important items in the financial statements we wanted to highlight for the year.

- MOEC's annual revenue has almost matched the budget for the year. This is expected as almost all revenue for the organization is received in the first quarter of the year.
- MOEC's total expenses for the year to date is \$107,707 (51% of annual budget) for the 7 months ended January 2021.
- Cash at the end of January is in a good position at \$141,304.

#### **Attachments:**

Budget vs Actual FY 2021  
Statement of Financial Position

Massachusetts Organization of Educational Collaboratives



## MOEC CONFLICT OF INTEREST POLICY

### ARTICLE I

#### Purpose

The purpose of the conflict of interest policy is to protect MOEC's interest when it is contemplating entering into a transaction or arrangement that might benefit the interest of an officer or director of MOEC or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

### ARTICLE II

#### Definitions

- Section 1: **Interested Person** Any member of the Board of Directors, Officer, or member of a committee with board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.
- Section 2: **Financial Interest** A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
- A. An ownership or investment interest in any entity with which MOEC has a transaction or arrangement,
  - B. A compensation arrangement with MOEC or with any entity or individual with which MOEC has a transaction or arrangement, or
  - C. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which MOEC is negotiating a transaction or arrangement.
  - D. Compensation includes direct and indirect remuneration as well as gifts or favors that aren't insubstantial. A financial interest isn't necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate Board of Directors or committee decides that a conflict of interest exists.

## ARTICLE III

### Procedures

- Section 1: **Duty to Disclose:** In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with Board of Directors delegated powers considering the proposed transaction or arrangement.
- Section 2: **Determining Whether a Conflict of Interest Exists** After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the Board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.
- Section 3: **Procedures for Addressing the Conflict of Interest**
- A. An interested person may make a presentation at the Board of Directors or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
  - B. The chairperson of the Board of Directors or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.
  - C. After exercising due diligence, the Board of Directors or committee shall determine whether MOEC can obtain, with reasonable efforts, a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
  - D. If a more advantageous transaction or arrangement isn't reasonably possible under circumstances not producing a conflict of interest, the Board of Directors or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in MOEC's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

**Section 4: Violations of the Conflict of Interest Policy**

- A. If the Board of Directors or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
- B. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the Board of Directors or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

**ARTICLE IV**

**Records of Proceedings**

The minutes of the Board of Directors and all committees with board delegated powers shall contain:

- Section 1: The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the Board of Directors' or committee's decision as to whether a conflict of interest in fact existed.
- Section 2: The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

**ARTICLE V**

**Compensation**

- Section 1: A voting member of the Board of Directors who receives compensation, directly or indirectly, from MOEC for services is precluded from voting on matters pertaining to that member's compensation.
- Section 2: A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from MOEC for services is precluded from voting on matters pertaining to that member's compensation.

Approved by the Board, March 8, 2021

Section 3: No voting member of the Board of Directors or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from MOEC, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

## **ARTICLE VI**

### **Annual Statements**

Each Board Member, Executive Director, and member of a committee with Board of Directors' delegated powers shall annually sign a statement which affirms such person:

- A. Has received a copy of the conflict of interest policy,
- B. Has read and understands the policy,
- C. Has agreed to comply with the policy, and
- D. Understands MOEC is a non-profit organization and in order to maintain its federal tax exemption it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

### **Periodic Reviews**

To ensure MOEC operates in a manner consistent with activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- A. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- B. Whether partnerships, joint ventures, and arrangements with management organizations conform to MOEC's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further tax-exempt purposes and don't result in inurement, impermissible private benefit, or in an excess benefit transaction.

## **ARTICLE VIII**

### **Use of Outside Experts**

When conducting the periodic reviews, as provided for in Article VII, MOEC may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the Board of Directors of its responsibility for ensuring periodic reviews are conducted.

Approved by the Board, March 8, 2021

Massachusetts Organization of Educational Collaboratives



## **Draft MOEC Document Retention and Destruction Policy**

The Document Retention and Destruction Policy identifies the record retention responsibilities of staff, volunteers, members of the Board of Directors, and outsiders for maintaining and documenting the storage and destruction of the organization's documents and records.

### **Document Destruction**

The Massachusetts Organization of Educational Collaboratives' (MOEC) staff, volunteers, members of the board of directors, committee members and outsiders (independent contractors via agreements with them) are required to honor the following rules:

- A. Paper or electronic documents indicated under the terms for retention in the following section will be transferred and maintained by the Executive Director or designee;
- B. All other paper documents may be destroyed after three years;
- C. All other electronic documents may be deleted from all individual computers, databases, networks, and back-up storage after one year;
- D. No paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation (check with legal counsel or the human resources department for any current or foreseen litigation if employees have not been notified); and
- E. No paper or electronic documents will be destroyed or deleted as required to comply with government auditing standards (Single Audit Act).

### **Record Retention**

The following table\* indicates the minimum requirements that MOEC will follow as its document retention policy. Because statutes of limitations and state and government agency requirements vary from state to state, MOEC will carefully consider Massachusetts' requirements. In addition, federal awards and other government grants may provide for a longer period than is required by other statutory requirements. Documents may be retained in paper or electronic format.

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<sup>1</sup>\* Adapted from National Council of Nonprofits.

| <b>Type of Document</b>                                                                       | <b>Minimum Requirements</b> |
|-----------------------------------------------------------------------------------------------|-----------------------------|
| Accounts payable ledgers and schedules                                                        | 7 years                     |
| Audit and Financial Review reports                                                            | Permanently                 |
| Bank reconciliations                                                                          | 2 years                     |
| Bank statements                                                                               | 3 years                     |
| Checks (for important payments and purchases)*                                                | Permanently                 |
| Contracts, mortgages, notes, and leases (expired)                                             | 7 years                     |
| Contracts (still in effect)                                                                   | Contract period             |
| Correspondence (general)                                                                      | 2 years                     |
| Correspondence (legal and important matters)                                                  | Permanently                 |
| Correspondence (with customers and vendors)                                                   | 2 years                     |
| Deeds, mortgages, and bills of sale                                                           | Permanently                 |
| Depreciation schedules                                                                        | Permanently                 |
| Duplicate deposit slips                                                                       | 2 years                     |
| Employment applications                                                                       | 3 years                     |
| Treasurer's Reports including expense analyses/expense distribution schedules                 | 7 years                     |
| Year-end financial statements                                                                 | Permanently                 |
| Insurance records, current accident reports, claims, policies, and so on (active and expired) | Permanently                 |
| Inventory records for products, materials, and supplies                                       | 3 years                     |
| Invoices (to customers, from vendors)                                                         | 7 years                     |
| Meeting minutes, bylaws, and Board policies                                                   | Permanently                 |
| Payroll records and summaries                                                                 | 7 years                     |
| Personnel files (terminated employees)                                                        | 7 years                     |
| Tax returns and worksheets                                                                    | Permanently                 |
| Withholding tax statements                                                                    | 7 years                     |



## Central Administration Office

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

### MEMORANDUM

To: Valley Collaborative Board of Directors  
From: Dr. Chris A. Scott, Executive Director  
Date: April 29, 2021  
Re: Communications – Community and Staff

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The following communications are attached for your review:

#### Community and Staff

- Email from Adam McCusker, Game Time Sports and Fitness Owner
- February 2021 Elementary School Monthly Newsletter
- Black History Month Lean On Me Video

#### Required Action:

None

#### Attachments:

Email from Adam McCusker, Game Time Sports and Fitness Owner  
February 2021 Elementary School Monthly Newsletter  
Black History Month Lean On Me Video

**From:** [Adam McCusker](#)  
**To:** [Chris Scott](#); [Nicole Noska](#); [Julie Fielding](#)  
**Subject:** [EXTERNAL] Valley Basketball at Gametime Lowell  
**Date:** Wednesday, March 24, 2021 7:55:17 AM

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**This email came from someone outside Valley Collaborative. Please use caution when clicking on any links or images in this message.**

To Whom it May Concern,

As the owner of Game Time Sports and Fitness, I have had the pleasure of watching your staff and students enjoy the use of my facilities for your basketball program. I am writing this letter to recognize the tremendous work that has been done by the Valley Collaborative staff and the outstanding behaviors of your students.

For the past several months, Valley Collaborative students have had the opportunity to play basketball at our indoor courts in Lowell. Your staff and students were a pleasure to host at our facility. Through my brief observations, it became clear that your staff are very dedicated to the health and safety of your student population. Whether they were coaching, refereeing games, or playing in a pick-up game, your staff are genuinely invested in providing safe and healthy opportunities for students; and did so with enthusiasm, patience, and humor.

Your students clearly have great relationships with the adults who work in your buildings. They were always very respectful using the space and followed our strict COVID guidelines. I had the pleasure to meet quite a few of your students and found them to be an enjoyable group of young men and women.

As a parent, it was such a great experience to see kids have some "normalcy" in their lives. To see kids playing, smiling, and joking together were a pleasant reminder of how we are finally moving forward. Your students are very fortunate to have a patient and enthusiastic staff who worked so diligently to provide a little bit of normalcy during a very challenging period of time.

It was a pleasure to host Valley Collaborative students and staff. I look forward to providing this opportunity again to your students in the future.

Best regards,

Adam McCusker  
Game Time Sports and Fitness Owner  
[Adam@gametimesportsandfitness.com](mailto:Adam@gametimesportsandfitness.com)



# Valley Collaborative Elementary School Newsletter

## February



### Last Month in Review

During the month of January we celebrated "Kindness Week." Staff and students decorated a kindness tree with examples of kindness they witnessed throughout the week. Students also sent "hugs" through the mail to local nursing homes, hoping to put a smile on their faces!

We want to introduce our school Resource Officers, Bethany Bonczar and Matthew Koziol, of the Tyngsborough Police Department. Every week, Bethany and Matt visit the school and have been a positive presence for the students and staff!



### From the desk of Kathryn Mari School Nurse

Valley Collaborative is participating in Phase 1 of COVID-19 testing in school with the Abbott BinaxNOW rapid point of care testing partnered with Massachusetts Department of Public Health and DESE! We still encourage students to stay home if they are sick. Please register your student online with Project Beacon using Organization Code: AVQXJH, or request a paper consent form from your nurse.

The CDC and Massachusetts Department of Public Health are recommending no travel for February vacation but if you are traveling you must adhere to the COVID-19 Travel Order. **If the order requires you to obtain a COVID-19 test, you must stay at home until you receive a negative result.** Please inform the school if you are planning on traveling.

### Upcoming Events

#### All Month-Black History Month

Each day, staff will read a short excerpt from "28 Days: Moments in Black History that Changed the World." In music class, students will learn about black artists and pioneers in music. Students are learning that all of American popular music has African and African American roots and highlighting the amazing Black artists who created and carry on these musical traditions.

#### Week of February 12<sup>th</sup>-Valentines' Day

Students will be taking class photos together to celebrate togetherness! Individual classroom activities will be organized throughout the week, such as friendship bingo and themed games, with some candy sprinkled through! We will also be doing a locker decorating contest and delivering Valentines in lockers.

### February Calendar

| Mo                           | Tu                     | We                                      | Th                     | Fr                     |
|------------------------------|------------------------|-----------------------------------------|------------------------|------------------------|
| 1                            | 2                      | 3                                       | 4                      | 5                      |
| 8                            | 9                      | 10<br><i>Early Release for Students</i> | 7                      | 8                      |
| 15<br><i>Presidents' Day</i> | 16                     | 17                                      | 18                     | 19                     |
| <i>School Vacation</i>       | <i>School Vacation</i> | <i>School Vacation</i>                  | <i>School Vacation</i> | <i>School Vacation</i> |
| 22                           | 23                     | 24                                      | 25                     | 26                     |

**From:** [Bryan Thomas](#)  
**To:** [Chris Scott](#)  
**Subject:** Re: Lean On Me Video  
**Date:** Friday, February 26, 2021 1:54:51 PM

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Dr. Scott,

Thank you for your kind words. It was our pleasure to create this video for our students.

Warm Regards,  
Bryan

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**From:** Chris Scott <cscott@valleycollaborative.org>  
**Sent:** Friday, February 26, 2021 1:47 PM  
**To:** Bryan Thomas <bthomas@valleycollaborative.org>  
**Cc:** Heather Mackay <hmackay@valleycollaborative.org>; Jennifer Bergeron <jbergeron@valleycollaborative.org>; Joia Mercurio <jmercurio@valleycollaborative.org>; Heather Valcanas <hvalcanas@valleycollaborative.org>; Kari Morrin <kmorrin@valleycollaborative.org>; Collaborative <collaborative@valleycollaborative.org>  
**Subject:** RE: Lean On Me Video

Dear Elementary School Staff Band,

I loved your Black History Month music video that you made for our students. ([You can find the video here.](#))

Thank you for sharing your talents in such a meaningful way. The video really speaks to our school's/collaborative's inclusive and caring culture.

With great appreciation and respect.

-Chris

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



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

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**From:** Heather Mackay

**Sent:** Friday, February 26, 2021 1:17 PM

**To:** Chris Scott <cscott@valleycollaborative.org>; Joia Mercurio

<jmercurio@valleycollaborative.org>; Heather Valcanas <hvalcanas@valleycollaborative.org>; Kari  
Morrin <kmorrin@valleycollaborative.org>

**Subject:** Lean On Me Video

Good Afternoon,

As part of our Black History Month celebration, Bryan Thomas worked with staff to create this amazing video showcasing the talents of our staff while using it as a tool to help students learn about inclusivity and the moments in history that changed the world. I thought you all would enjoy seeing it!

[You can find the video here.](#)

Best,

Heather Mackay, M.Ed

Principal/Special Education Administrator

Valley Collaborative

Elementary School

[135 Coburn Rd](#)

[Tyngsborough, MA 01879](#)

(978) 528-7843