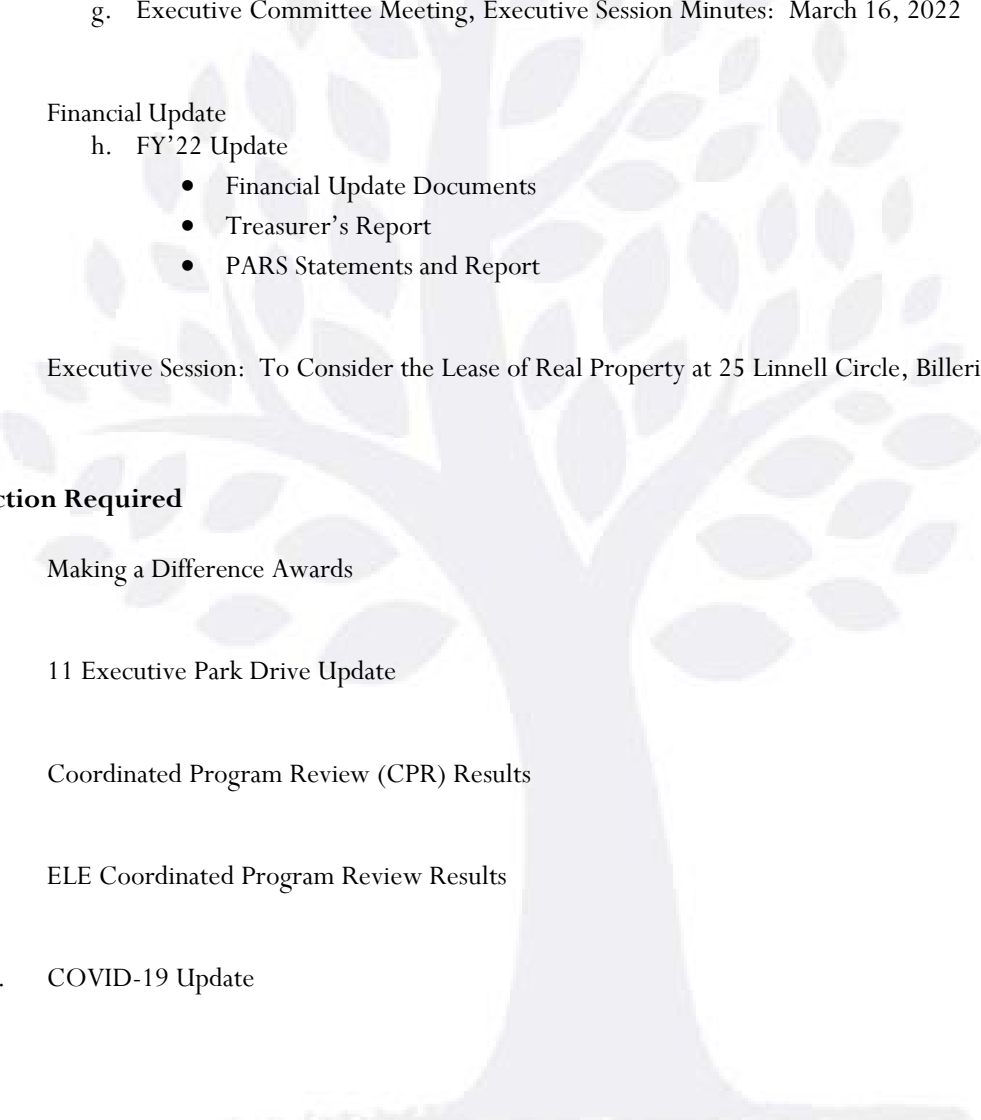


**Valley Collaborative
Board of Directors Meeting
25 Linnell Circle, Billerica, Massachusetts
Thursday, April 28, 2022 ▪ 10:00 a.m.**

Action Required

- 
- I. Approval of Minutes
 - a. Board of Directors Meeting, General Session Minutes: January 13, 2022
 - b. Executive Committee Meeting, General Session Minutes: January 26, 2022
 - c. Executive Committee Meeting, Executive Session Minutes: January 26, 2022
 - d. Executive Committee Meeting, General Session Minutes: February 2, 2022
 - e. Executive Committee Meeting, Executive Session Minutes: February 2, 2022
 - f. Executive Committee Meeting, General Session Minutes: March 16, 2022
 - g. Executive Committee Meeting, Executive Session Minutes: March 16, 2022
 - II. Financial Update
 - h. FY'22 Update
 - Financial Update Documents
 - Treasurer's Report
 - PARS Statements and Report
 - III. Executive Session: To Consider the Lease of Real Property at 25 Linnell Circle, Billerica, MA

No Action Required

- IV. Making a Difference Awards
- V. 11 Executive Park Drive Update
- VI. Coordinated Program Review (CPR) Results
- VII. ELE Coordinated Program Review Results
- VIII. COVID-19 Update

**Valley Collaborative
Board of Directors Meeting
25 Linnell Circle, Billerica, Massachusetts
Thursday, April 28, 2022 ▪ 10:00 a.m.**

IX. Communications

State Agencies

- i. Massachusetts Department of Elementary and Secondary Education (DESE)
FY'21 Annual Report Approval Letter
- j. Massachusetts Department of Elementary and Secondary Education (DESE)
FY'21 Annual Independent Audit Report Approval Letter
- k. Memo to Commissioner Jeffrey C. Riley, Massachusetts Department of
Elementary and Secondary Education (DESE)

Valley Program Updates

- l. Elementary School Update
- m. Alternative Programming Middle School and Transitional High School Update
- n. Transitional Programming Middle School and Transitional High School Update
- o. Adult Services Update

Community and Staff

- p. Massachusetts Department of Elementary and Secondary Education (DESE)
Deputy Commissioner Regina M. Robinson – Keynote Speaker for
Valley's Opening Day 2022-2023
- q. Special Education Directors Update
- r. Email from Christopher Malone, Retired Superintendent,
Tewksbury Public Schools
- s. Valley Board Member Appointment
- t. Valley Collaborative Transitional High School Graduation
- u. Valley Collaborative Basketball Team
- v. Valley Organizational Chart
- w. Valley's Spring Newsletter



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Approval of Minutes

Attached please find the following minutes:

- a. Board of Directors Meeting General Session Minutes: January 13, 2022
- b. Executive Committee Meeting General Session Minutes: January 26, 2022
- c. Executive Committee Meeting, Executive Session Minutes: January 26, 2022
- d. Executive Committee Meeting, General Session Minutes: February 2, 2022
- e. Executive Committee Meeting, Executive Session Minutes: February 2, 2022
- f. Executive Committee Meeting, General Session Minutes: March 16, 2022
- g. Executive Committee Meeting, Executive Session Minutes: March 16, 2022

Required Action:

Vote to approve the minutes:

- a. Board of Directors Meeting General Session Minutes: January 13, 2022
- b. Executive Committee Meeting General Session Minutes: January 26, 2022
- c. Executive Committee Meeting, Executive Session Minutes: January 26, 2022
- d. Executive Committee Meeting, General Session Minutes: February 2, 2022
- e. Executive Committee Meeting, Executive Session Minutes: February 2, 2022
- f. Executive Committee Meeting, General Session Minutes: March 16, 2022
- g. Executive Committee Meeting, Executive Session Minutes: March 16, 2022

Attachments:

Board of Directors Meeting General Session Minutes: January 13, 2022
Executive Committee Meeting General Session Minutes: January 26, 2022
Executive Committee Meeting, Executive Session Minutes: January 26, 2022
Executive Committee Meeting, General Session Minutes: February 2, 2022
Executive Committee Meeting, Executive Session Minutes: February 2, 2022
Executive Committee Meeting, General Session Minutes: March 16, 2022
Executive Committee Meeting, Executive Session Minutes: March 16, 2022

**Valley Collaborative Board of Directors
General Session Meeting Minutes
January 13, 2022
10:02 a.m. – 10:44 a.m.
25 Linnell Circle, Billerica, MA**

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

Board Members Absent: None

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 10:02 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 restrictions and limitations related to COVID-19. Mr. Piwowar conducted a roll call of Board Members present remotely and requested the same be recorded within the meeting minutes.

Valley Collaborative Board Member and Staff Retirement and Acknowledgements

Dr. Scott introduced and acknowledged Joe Reilly, who operated the Collaborative kitchen and restaurant. Dr. Scott expressed appreciation for his daily efforts as well as contributions to the annual Thanksgiving Turkey Dinners, community involvement and Collaborative staff and student leadership and participation. On behalf of the Board, Mr. Piwowar and Dr. Flanagan similarly acknowledged his contributions and involvement with the Collaborative.

[Dr. Jay Lang joined the Board meeting at 10:05 a.m. and Mr. Piwowar requested his attendance be recorded in the meeting minutes]

Dr. Scott acknowledged Christopher Malone for his participation and contributions to the Board of Directors for the Collaborative. On behalf of the Board, Mr. Piwowar also acknowledged his contributions to the Board of Directors for the Collaborative.

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 Mr. Steven Stone and seconded by Dr. Michael Flanagan, 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 2, 2021.

The vote was 9-0. Yes: Mr. Timothy Piwowar, Mr. Brad Morgan, Dr. Christopher Chew, Dr. Laura Chesson, Dr. Jay Lang, Mr. Steven Stone, Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Michael Flanagan

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

VOTED: To approve the General Session Meeting Minutes for the Executive Committee of Board of Directors dated November 9, 2021.

The vote was 3-0-1. Yes: Mr. Timothy Piwowar, Dr. Jay Lang, Dr. Denise Pigeon. Dr. Michael Flanagan abstained.

Fiscal Year 2023 Budget

Dr. Scott reviewed with the Board the proposed budget for fiscal year 2023, which had been reviewed and discussed previously by the Board at its prior meetings. She again reviewed with the Board the Fiscal Year 2023 Budget 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 2023. 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 2023 Budget, including an Operating Expense Budget for the Collaborative in the amount of \$19,610,906 as presented and recommended by the Executive Director; and requests that the Treasurer certify and transmit the budget for Fiscal Year 2023 to each member district by no later than February 1, 2022.

The vote was 9-0. Yes: Mr. Timothy Piwowar, Mr. Brad Morgan, Dr. Christopher Chew, Dr. Laura Chesson, Dr. Jay Lang, Mr. Steven Stone, Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Michael Flanagan

On a motion made by Mr. Brad Morgan and seconded by Mr. Steven Stone, 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 2023 as presented; and requests that the Treasurer certify and transmit the tuition rates and fees-for-services for Fiscal Year 2023 to each member district by no later than February 1, 2022.

The vote was 9-0. Yes: Mr. Timothy Piwowar, Mr. Brad Morgan, Dr. Christopher Chew, Dr. Laura Chesson, Dr. Jay Lang, Mr. Steven Stone, Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Michael Flanagan

On a motion made by Mr. Steven Stone and seconded by Mr. Brad Morgan, 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 2023 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 2023.

The vote was 9-0. Yes: Mr. Timothy Piwowar, Mr. Brad Morgan, Dr. Christopher Chew, Dr. Laura Chesson, Dr. Jay Lang, Mr. Steven Stone, Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Michael Flanagan

Financial Update

[Mr. Timothy Piwowar left the meeting at 10:24 a.m. He returned at 10:26 a.m.]

Executive Director's Report

Dr. Scott directed the Board to the financial update memo contained within the Board meeting materials. Dr. Scott reviewed the revenues, expenses, budget and enrollment. There was no further discussion.

Treasurer's Report

Ms. Heidi Kriger, the Collaborative Treasurer, provided the Board with her report which covered the months through November 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. There was no further discussion.

[Brad Morgan left the meeting at 10:27 a.m.]

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: 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 8-0. Yes: Mr. Timothy Piwowar, Dr. Christopher Chew, Dr. Laura Chesson, Dr. Jay Lang, Mr. Steven Stone, Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Michael Flanagan. Mr. Brad Morgan was absent for the vote.

Academic Calendars

Dr. Scott reviewed the proposed 2022-2023 School Year calendar.

On a motion made by Mr. Steven Stone and seconded by Dr. Denise Pigeon, 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 2022-2023 School Year as presented, and authorizes the Executive Director to post such dates on the Collaborative website.

The vote was 8-0. Yes: Mr. Timothy Piwowar, Dr. Christopher Chew, Dr. Laura Chesson, Dr. Jay Lang, Mr. Steven Stone, Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Michael Flanagan. Mr. Brad Morgan was absent for the vote.

Student and Family Handbook and Policies and Procedures Manual

Dr. Scott reviewed the proposed changes to the manual consistent with the new laws, regulations and compliance with the Department of Elementary and Secondary Education's upcoming Program Review criteria. She reviewed the memo contained within the Board materials. There was no further discussion.

On a motion made by Dr. Michael Flanagan 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 revised Student and Family Handbook and Policies & Procedure Manual in the substantive form presented at this meeting.

The vote was 8-0. Yes: Mr. Timothy Piwowar, Dr. Christopher Chew, Dr. Laura Chesson, Dr. Jay Lang, Mr. Steven Stone, Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Michael Flanagan. Mr. Brad Morgan was absent for the vote.

Tyngsborough Window Project

Dr. Scott provided the Board with an update regarding the approved window project. Specifically, she indicated that the initial date of completion deadline of October 2022 may not be possible given supply issues as explained by contractors. She indicated that both the Collaborative and Tyngsborough will continue to update the Board. She also stated that contingency plans are being considered and developed in the event that the concern with the deadline expressed by contractors becomes reality as the deadline approaches. The Board discussed.

Covid-19 Update

Dr. Scott indicated that Lead Nurse Jessica Scalzi could not attend the Board meeting given ongoing Covid-19 matters. Dr. Scott expressed her appreciation for her ongoing efforts. Dr. Scott provided the Board with a Covid-19 update as to the Collaborative. 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 Dr. Denise Pigeon and seconded by Mr. Christopher Malone, a quorum of voters being present, it was voted by roll call vote:

VOTED: To adjourn the Board meeting.

The vote was 8-0. Yes: Mr. Timothy Piwowar, Dr. Christopher Chew, Dr. Laura Chesson, Dr. Jay Lang, Mr. Steven Stone, Dr. Denise Pigeon, Mr. Christopher Malone, Dr. Michael Flanagan. Mr. Brad Morgan was absent for the vote.

Mr. Timothy Piwowar adjourned the Collaborative Board Meeting at 10:44 a.m.

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

- School Year 2021-2022 Electronic Board Binder for Board Meeting, January 13, 2022

Respectfully Submitted,

Mr. Timothy Piwowar, Chairman

Dated: _____



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Ph.D. Treasurer
James George, CPA, CVA, JD, Accountant
Date: April 28, 2022
Re: Update through February 28, 2022

As of February 28, 2022 (131 of 210 days – 62%) Valley closed favorably with revenues on target at 64% and expenses at 65.8%. Consistent with the end of the February of previous years, most 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 enrollment has increased over the past several months.

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 above our budgeted amount. We believe that by the end of the year, we should be at or slightly more than budgeted expenditures. This is primarily due to an increase in salary costs due to additional hiring, mostly 1:1 Aides, needed to accommodate the addition in students. As of the end of April 2022, we are up to 277 students up from 239 in October 2021 when our amended budget was prepared. In October we had a total staff count of 242 FTEs and as of the end of April 2022, we have currently 253 FTEs.

Attachments:

Profit and Loss by Program January 31, 2022 and February 28, 2022
Balance Sheet January 31, 2022 and February 28, 2022
Profit and Loss January 31, 2022 and February 28, 2022
Treasurer’s Reports
PARS Statements

Valley Collaborative
Interim Statement of Revenues, Expenses and Changes in Net Assets
For the Period Ending January 31, 2022
117 of 210 (56%) School Days

UNAUDITED			
	AMENDED BUDGET	ACTUAL	
REVENUES			
Services	\$ 16,250,000	\$ 8,706,320	
State Contracts	3,050,000	2,055,116	
Other	925,000	727,219	
Interest	1,000	630	
Total Revenues	20,226,000	11,489,285	56.80%
EXPENSES			
Salaries	13,381,932	7,709,580	
Employee Benefits	2,484,635	1,316,397	
Operating Expenses	1,907,900	1,180,616	
Leases & Rentals	514,609	316,177	
Depreciation	751,000	445,722	
Total Expenses	19,040,076	10,968,492	57.6%
Change in Net Assets - Operating	\$ 1,185,924	\$ 520,793	
Non Operating Activities			
Return to Member Districts	-	-	
Non-Operating Expenses (1)	(899,000)	(350,676)	
Change in Net Assets	\$ 286,924	\$ 170,117	

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

Valley Collaborative
Interim Statement of Net Assets
For the Period Ended
January 31, 2022

UNAUDITED	
ASSETS	
Current Assets	
Cash and Cash Equivalents	\$ 4,358,555
Restricted Investments - OPEB	6,355,312
Accounts Receivable, Net	3,286,827
Prepaid Expenses and Other Assets	112,583
Cash Held for Member Districts	784,889
Total Current Assets	<u>14,898,166</u>
Non-Current Assets	
Land & Building	5,291,980
Furniture, Equipment, and Leasehold Improvements,	
Net of Depreciation	1,940,570
Construction in Progress	-
Total Non-Current Assets	<u>7,232,550</u>
TOTAL ASSETS	<u><u>\$ 22,130,716</u></u>
LIABILITIES AND NET ASSETS	
Current Liabilities	
Accounts Payable and Accrued Liabilities	\$ 1,465,389
Other Liabilities	2,516,129
Member District Accounts (Settlement)	784,889
Total Current Liabilities	<u>4,766,407</u>
Total Liabilities	<u>4,766,407</u>
Net Assets	
Operating - Unrestricted	5,531,355
Restricted - Student Activities	24,192
Reserved - OPEB Trust	2,725,536
Reserved - Capital	1,500,000
Invested in Capital Assets, Net of Related Debt	7,583,226
Total Net Assets	<u>17,364,309</u>
TOTAL LIABILITIES AND NET ASSETS	<u><u>\$ 22,130,716</u></u>
	-

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

Income Statement by Program

January 31, 2022
117 of 210 Days

	100	200	400	712	660	450	665	500	101 MRC	102 MRC	
	Central Admin	HS Site 3	HS Site 2	Middle School	Elementary	Therapy	Home Services	DDS	Education & Training	Supportive Work	Total
REVENUES											
Services	\$ -	\$ 3,217,761	\$ 1,330,227	\$ 1,273,111	\$ 2,871,589	\$ 10,042	\$ 3,590	\$ -	\$ -	\$ -	\$ 8,706,320
State Contracts	-	-	-	-	-	-	-	1,764,933	208,901	81,282	2,055,116
Other	460,938	20,495	-	-	2,324	-	1,600	239,578	2,284	-	727,219
Interest	630	-	-	-	-	-	-	-	-	-	630
Total Revenues	461,568	3,238,256	1,330,227	1,273,111	2,873,913	10,042	5,190	2,004,511	211,185	81,282	11,489,285
EXPENSES											
Salaries	618,104	2,074,461	1,011,618	835,587	1,911,627	62,932	-	1,041,401	99,777	54,073	7,709,580
Employee Benefits	295,312	261,795	105,943	99,177	245,376	151,970	-	156,824	-	-	1,316,397
Operating Expenses	392,148	278,741	107,912	106,516	191,630	1,268	-	88,004	10,312	4,085	1,180,616
Leases & Rentals	21,100	-	8,440	-	191,962	-	-	75,960	14,972	3,743	316,177
Depreciation	57,634	150,466	94,042	36,098	40,016	3,825	374	59,949	3,144	174	445,722
Total Expenses	1,384,298	2,765,463	1,327,955	1,077,378	2,580,611	219,995	374	1,422,138	128,205	62,075	10,968,492
Net Income Before Admin Allocation	(922,730)	472,793	2,272	195,733	293,302	(209,953)	4,816	582,373	82,980	19,207	520,793
Admin Allocation	(922,730)	236,197	113,420	92,019	220,409	18,790	32	213,321	19,231	9,311	0
Operating Net Income	\$ -	\$ 236,596	\$ (111,148)	\$ 103,714	\$ 72,893	\$ (228,743)	\$ 4,784	\$ 369,052	\$ 63,749	\$ 9,896	\$ 520,793

Valley Collaborative
Interim Statement of Revenues, Expenses and Changes in Net Assets
For the Period Ending February 28, 2022
131 of 210 (62%) School Days

UNAUDITED			
	AMENDED BUDGET	ACTUAL	
REVENUES			
Services	\$ 16,250,000	\$ 9,849,220	
State Contracts	3,050,000	2,274,235	
Other	925,000	819,863	
Interest	1,000	875	
Total Revenues	20,226,000	12,944,193	64.00%
EXPENSES			
Salaries	13,381,932	8,785,687	
Employee Benefits	2,484,635	1,550,847	
Operating Expenses	1,907,900	1,352,278	
Leases & Rentals	514,609	331,704	
Depreciation	751,000	509,396	
Total Expenses	19,040,076	12,529,912	65.8%
Change in Net Assets - Operating	\$ 1,185,924	\$ 414,281	
Non Operating Activities			
Return to Member Districts	-	-	
Non-Operating Expenses (1)	(899,000)	(390,536)	
Change in Net Assets	\$ 286,924	\$ 23,745	

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

Valley Collaborative
Interim Statement of Net Assets
For the Period Ended
February 28, 2022

UNAUDITED	
ASSETS	
Current Assets	
Cash and Cash Equivalents	\$ 3,658,055
Restricted Investments - OPEB	6,215,683
Accounts Receivable, Net	3,587,239
Prepaid Expenses and Other Assets	112,583
Cash Held for Member Districts	659,757
Total Current Assets	<u>14,233,317</u>
Non-Current Assets	
Land & Building	5,269,063
Furniture, Equipment, and Leasehold Improvements,	
Net of Depreciation	1,899,813
Construction in Progress	-
Total Non-Current Assets	<u>7,168,876</u>
TOTAL ASSETS	<u><u>\$ 21,402,193</u></u>
LIABILITIES AND NET ASSETS	
Current Liabilities	
Accounts Payable and Accrued Liabilities	\$ 1,148,281
Other Liabilities	2,516,129
Member District Accounts (Settlement)	659,757
Total Current Liabilities	<u>4,324,167</u>
Total Liabilities	<u>4,324,167</u>
Net Assets	
Operating - Unrestricted	5,408,797
Restricted - Student Activities	23,910
Reserved - OPEB Trust	2,585,907
Reserved - Capital	1,500,000
Invested in Capital Assets, Net of Related Debt	7,559,412
Total Net Assets	<u>17,078,026</u>
TOTAL LIABILITIES AND NET ASSETS	<u><u>\$ 21,402,193</u></u>
	-

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

Income Statement by Program

February 28, 2022
131 of 210 Days

	100	200	400	712	660	450	665	500	101 MRC	102 MRC	
	Central Admin	HS Site 3	HS Site 2	Middle School	Elementary	Therapy	Home Services	DDS	Education & Training	Supportive Work	Total
REVENUES											
Services	\$ -	\$ 3,584,163	\$ 1,521,959	\$ 1,424,458	\$ 3,305,008	\$ 10,042	\$ 3,590	\$ -	\$ -	\$ -	\$ 9,849,220
State Contracts	-	-	-	-	-	-	-	1,979,455	208,901	85,879	2,274,235
Other	517,252	23,779	-	-	2,324	-	1,600	272,624	2,284	-	819,863
Interest	875	-	-	-	-	-	-	-	-	-	875
Total Revenues	518,127	3,607,942	1,521,959	1,424,458	3,307,332	10,042	5,190	2,252,079	211,185	85,879	12,944,193
EXPENSES											
Salaries	751,695	2,357,041	1,138,666	938,772	2,170,362	68,689	-	1,187,997	112,046	60,419	8,785,687
Employee Benefits	380,264	301,903	121,471	113,727	278,974	173,635	-	180,873	-	-	1,550,847
Operating Expenses	479,451	306,679	124,499	116,565	210,337	1,395	-	97,925	10,942	4,485	1,352,278
Leases & Rentals	23,737	-	9,495	-	191,962	-	-	85,456	16,843	4,211	331,704
Depreciation	65,868	171,962	107,477	41,254	45,733	4,371	427	68,512	3,593	199	509,396
Total Expenses	1,701,015	3,137,585	1,501,608	1,210,318	2,897,368	248,090	427	1,620,763	143,424	69,314	12,529,912
Net Income Before Admin Allocation	(1,182,888)	470,357	20,351	214,140	409,964	(238,048)	4,763	631,316	67,761	16,565	414,281
Admin Allocation	(1,182,888)	316,662	151,550	122,152	292,418	25,039	43	243,114	21,514	10,397	(0)
Operating Net Income	\$ -	\$ 153,695	\$ (131,199)	\$ 91,988	\$ 117,546	\$ (263,087)	\$ 4,720	\$ 388,202	\$ 46,247	\$ 6,168	\$ 414,281

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JANUARY 31, 2022**

		<u>Beginning Balance</u>	<u>Receipts</u>	<u>Payroll</u>	<u>Accounts Payable</u>	<u>Earnings</u>	<u>Transfers</u>	<u>Ending Balance</u>
ENTERPRISE BANK ACCOUNTS								
Operating	a/c 493426	\$ 1,180,500.64	\$ 1,750,002.16		\$ (279,516.16)		\$ (1,000,000.00)	\$ 1,650,986.64
Payroll	a/c 795823	\$ 489,479.35		\$ (928,796.07)			\$ 1,000,000.00	\$ 560,683.28
Joe's Bistro	a/c 531401	\$ 2,437.97	\$ 4,294.00		\$ (1,788.19)			\$ 4,943.78
ICS MMDA	a/c 856490	\$ 414,625.70				\$ 17.60		\$ 414,643.30
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	\$ 864.36						\$ 864.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 3,587,908.02</u>	<u>\$ 1,754,296.16</u>	<u>\$ (928,796.07)</u>	<u>\$ (281,304.35)</u>	<u>\$ 17.60</u>	<u>\$ -</u>	<u>\$ 4,132,121.36</u>
 MMDT	a/c 0044263747	<u>\$ 1,003,982.17</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 114.11</u>	<u>\$ -</u>	<u>\$ 1,004,096.28</u>
 Total Unrestricted Cash		<u>\$ 4,591,890.19</u>	<u>\$ 1,754,296.16</u>	<u>\$ (928,796.07)</u>	<u>\$ (281,304.35)</u>	<u>\$ 131.71</u>	<u>\$ -</u>	<u>\$ 5,136,217.64</u>
 PARS OPEB Trust		<u>\$ 6,616,131.37</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (1,591.16)</u>	<u>\$ (259,228.53)</u>	<u>\$ -</u>	<u>\$ 6,355,311.68</u>
 TOTAL CASH		<u>\$ 11,208,021.56</u>	<u>\$ 1,754,296.16</u>	<u>\$ (928,796.07)</u>	<u>\$ (282,895.51)</u>	<u>\$ (259,096.82)</u>	<u>\$ -</u>	<u>\$ 11,491,529.32</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
FEBRUARY 28, 2022**

		<u>Beginning Balance</u>	<u>Receipts</u>	<u>Payroll</u>	<u>Accounts Payable</u>	<u>Earnings</u>	<u>Transfers</u>	<u>Ending Balance</u>
ENTERPRISE BANK ACCOUNTS								
Operating	a/c 493426	\$ 1,650,986.64	\$ 1,010,228.09		\$ (213,419.32)		\$ (1,300,000.00)	\$ 1,147,795.41
Payroll	a/c 795823	\$ 560,683.28		\$ (1,626,755.20)			\$ 1,300,000.00	\$ 233,928.08
Joe's Bistro	a/c 531401	\$ 4,943.78	\$ 3,284.00		\$ (1,144.19)			\$ 7,083.59
ICS MMDA	a/c 856490	\$ 414,643.30				\$ 15.89		\$ 414,659.19
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	\$ 864.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 864.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 4,132,121.36</u>	<u>\$ 1,013,512.09</u>	<u>\$ (1,626,755.20)</u>	<u>\$ (214,563.51)</u>	<u>\$ 15.89</u>	<u>\$ -</u>	<u>\$ 3,304,330.63</u>
MMDT	a/c 0044263747	\$ 1,004,096.28	\$ -	\$ -	\$ -	\$ 115.05	\$ -	\$ 1,004,211.33
Total Unrestricted Cash		<u>\$ 5,136,217.64</u>	<u>\$ 1,013,512.09</u>	<u>\$ (1,626,755.20)</u>	<u>\$ (214,563.51)</u>	<u>\$ 130.94</u>	<u>\$ -</u>	<u>\$ 4,308,541.96</u>
PARS OPEB Trust		<u>\$ 6,355,311.68</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (1,885.21)</u>	<u>\$ (137,743.46)</u>	<u>\$ -</u>	<u>\$ 6,215,683.01</u>
TOTAL CASH		<u>\$ 11,491,529.32</u>	<u>\$ 1,013,512.09</u>	<u>\$ (1,626,755.20)</u>	<u>\$ (216,448.72)</u>	<u>\$ (137,612.52)</u>	<u>\$ -</u>	<u>\$ 10,524,224.97</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
MARCH 31, 2022**

		<u>Beginning Balance</u>	<u>Receipts</u>	<u>Payroll</u>	<u>Accounts Payable</u>	<u>Earnings</u>	<u>Transfers</u>	<u>Ending Balance</u>
ENTERPRISE BANK ACCOUNTS								
Operating	a/c 493426	\$ 1,147,795.41	\$ 2,101,810.70		\$ (313,762.09)		\$ (1,992,000.00)	\$ 943,844.02
Payroll	a/c 795823	\$ 233,928.08		\$ (1,533,815.57)			\$ 2,000,000.00	\$ 700,112.51
Joe's Bistro	a/c 531401	\$ 7,083.59	\$ 4,676.00		\$ (991.72)		\$ (8,000.00)	\$ 2,767.87
ICS MMDA	a/c 856490	\$ 414,659.19				\$ 17.60		\$ 414,676.79
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	\$ 864.36						\$ 864.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 3,304,330.63</u>	<u>\$ 2,106,486.70</u>	<u>\$ (1,533,815.57)</u>	<u>\$ (314,753.81)</u>	<u>\$ 17.60</u>	<u>\$ -</u>	<u>\$ 3,562,265.55</u>
 MMDT	a/c 0044263747	<u>\$ 1,004,211.33</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 259.86</u>	<u>\$ -</u>	<u>\$ 1,004,471.19</u>
 Total Unrestricted Cash		<u>\$ 4,308,541.96</u>	<u>\$ 2,106,486.70</u>	<u>\$ (1,533,815.57)</u>	<u>\$ (314,753.81)</u>	<u>\$ 277.46</u>	<u>\$ -</u>	<u>\$ 4,566,736.74</u>
 PARS OPEB Trust		<u>\$ 6,215,683.01</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (1,497.11)</u>	<u>\$ 20,440.24</u>	<u>\$ -</u>	<u>\$ 6,234,626.14</u>
 TOTAL CASH		<u>\$ 10,524,224.97</u>	<u>\$ 2,106,486.70</u>	<u>\$ (1,533,815.57)</u>	<u>\$ (316,250.92)</u>	<u>\$ 20,717.70</u>	<u>\$ -</u>	<u>\$ 10,801,362.88</u>



VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
12/1/2021 to 12/31/2021

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

Account Summary

Source	Beginning Balance as of 12/1/2021	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 12/31/2021
OPEB	\$6,451,630.66	\$0.00	\$166,053.49	\$1,552.78	\$0.00	\$0.00	\$6,616,131.37
Totals	\$6,451,630.66	\$0.00	\$166,053.49	\$1,552.78	\$0.00	\$0.00	\$6,616,131.37

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	2.57%	4.21%	11.22%	15.32%	10.64%	-	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

Headquarters - 4350 Von Karman Ave., Suite 100, Newport Beach, CA 92660 800.540.6369 Fax 949.250.1250 www.pars.org



VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
1/1/2022 to 1/31/2022

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

Account Summary

Source	Beginning Balance as of 1/1/2022	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 1/31/2022
OPEB	\$6,616,131.37	\$0.00	-\$259,228.53	\$1,591.16	\$0.00	\$0.00	\$6,355,311.68
Totals	\$6,616,131.37	\$0.00	-\$259,228.53	\$1,591.16	\$0.00	\$0.00	\$6,355,311.68

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	-3.92%	-2.83%	7.56%	11.69%	9.42%	-	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 Program

Account Report for the Period
2/1/2022 to 2/28/2022

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

Account Summary

Source	Beginning Balance as of 2/1/2022	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 2/28/2022
OPEB	\$6,355,311.68	\$0.00	-\$137,743.46	\$1,885.21	\$0.00	\$0.00	\$6,215,683.01
Totals	\$6,355,311.68	\$0.00	-\$137,743.46	\$1,885.21	\$0.00	\$0.00	\$6,215,683.01

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	-2.17%	-3.59%	4.05%	10.27%	8.50%	-	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

Headquarters - 4350 Von Karman Ave., Suite 100, Newport Beach, CA 92660 800.540.6369 Fax 949.250.1250 www.pars.org

VALLEY COLLABORATIVE
PARS OPEB Trust ProgramAccount Report for the Period
3/1/2022 to 3/31/2022Heidi Kriger
Treasurer
Valley Collaborative
40 Linnell Circle
Billerica, MA 01821**Account Summary**

Source	Beginning Balance as of 3/1/2022	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 3/31/2022
OPEB	\$6,215,683.01	\$0.00	\$20,440.24	\$1,497.11	\$0.00	\$0.00	\$6,234,626.14
Totals	\$6,215,683.01	\$0.00	\$20,440.24	\$1,497.11	\$0.00	\$0.00	\$6,234,626.14

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	0.33%	-5.69%	2.98%	9.79%	8.51%	-	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

From: [Kathryn Cannie](#)
To: ["heidikruger@gmail.com"](mailto:heidikruger@gmail.com); [Chris Scott](#)
Subject: [EXTERNAL] PARS OPEB Trust Q4 Vanguard Report
Date: Thursday, January 27, 2022 11:49:29 AM
Attachments: [PARS - Vanguard Q4 2021 Report Balanced.pdf](#)

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

Good afternoon,

Please find attached the fourth quarter Vanguard Investment Report (as of December 31, 2021) for your selected investment strategy (balanced) in the PARS Trust. The report includes a summary of your portfolio, detail on the underlying funds and a market outlook. Please note that the reported returns are for the investment pools and therefore, due to the timing of contributions and distributions, actual returns for an individual trust account may differ slightly from these published figures.

If you have any questions, please do not hesitate to reach out to me.

Thank you,

Kate

Kathryn Cannie

Senior Manager – Eastern Region

Public Agency Retirement Services (PARS)

617-549-6555

www.pars.org

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PARS OPEB TRUST PROGRAM VANGUARD QUARTERLY INVESTMENT REPORT

December 31, 2021

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PARS Investment Partnership - Balanced Strategy

Overview

The PARS Investment Partnership relates to a relationship between Vanguard and PARS where Vanguard manages four strategies (Conservative, Balanced, Growth, and Fixed Income) in which individual clients can invest their assets according to their appropriate investment objective.

Investment objective

The Balanced Strategy seeks to provide capital appreciation and a low to moderate level of current income consistent with its current allocation.

Investment strategy

The Balanced Strategy invests in Vanguard mutual funds using an asset allocation strategy designed for investors seeking capital appreciation and a low to moderate level of current income. The underlying funds are: Vanguard Total Stock Market Index Fund, Vanguard Total International Stock Index Fund, Vanguard Total Bond Market Index Fund, Vanguard Intermediate-Term Investment-Grade Fund, Vanguard Short-Term Investment-Grade Fund, Vanguard Total International Bond Index Fund, and Vanguard REIT Index Fund.

The strategy's indirect stock holdings are a diversified mix of U.S. and foreign large-, mid-, and small-capitalization stocks. The strategy's indirect bond holdings are a diversified mix of short-, intermediate-, and long-term U.S. government, U.S. agency, and investment-grade U.S. corporate bonds; mortgage-backed and asset-backed securities; and government, agency, and corporate bonds. The Strategy also holds currency-hedged international bonds.

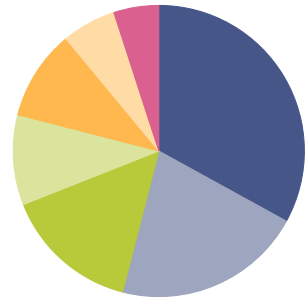
Fees

The fees for managing the strategy consists of the expense ratios of the individual funds and the advisor fee. Both of these fees are dependent on the assets under management. Currently the average expense ratio is **0.08%** which consists of averaging the expense ratio of the individual funds which are outlined above. The average advisory fee is **0.02%** based on the current assets under management.

PARS Investment Partnership - Balanced Strategy

Holdings

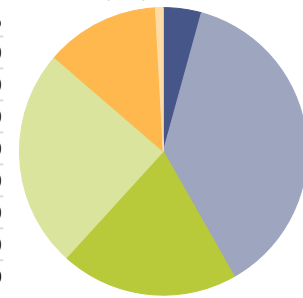
Date: 12/31/2021



	%
Vanguard Total Stock Mkt Idx Adm	33.0
Vanguard Total Intl Stock Index Admiral	21.0
Vanguard Total Bond Market Index Adm	15.0
Vanguard Inter-Term Investment-Grde Adm	10.0
Vanguard Total Intl Bd Idx Admiral™	10.0
Vanguard Real Estate Index Admiral	6.0
Vanguard Short-Term Investment-Grade Adm	5.0
Total	100.0

Asset allocation

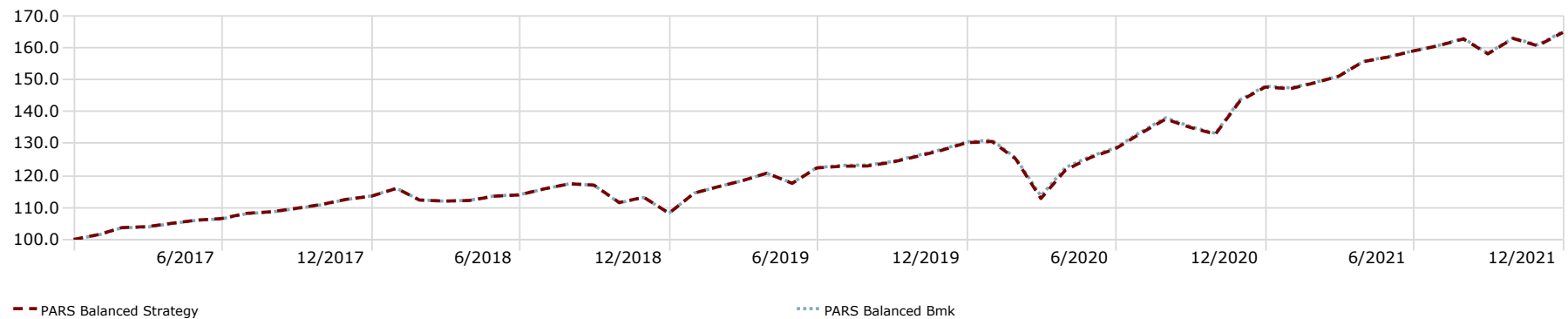
Date: 12/31/2021



	%
Cash	4.3
US Equity	37.5
Non-US Equity	20.0
US Bond	24.6
Non-US Bond	12.8
Other	0.9
Total	100.0

Investment growth

Time Period: 1/1/2017 to 12/31/2021

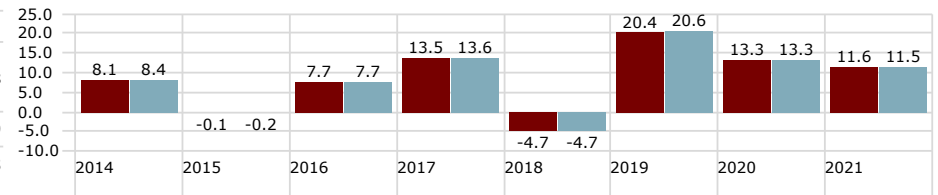


Trailing Returns - Annualized after one year

As of Date: 12/31/2021

	YTD	One Year	Three Years	Five Years	Eight Years	Ten Years
PARS Balanced Strategy	11.55	11.55	15.03	10.49	8.46	9.29
PARS Balanced Benchmark	11.52	11.52	15.08	10.53	8.51	9.28

Annual returns



Benchmark

Prior to 12/31/2020: 37.1% Spliced Total Stock Mkt Index (equal to CRSP US Total Market Index as of 6/2/13, MSCI US Broad Market Index through 4/22/05, prior DJ Wilshire 5000 Index)/ 15.9% Spliced Total International Composite Index (Consists of the Total International Composite Index through August 31, 2006; the MSCI EAFE + Emerging Markets Index through December 15, 2010; the MSCI ACWI ex USA IMI Index through 6/2/13; and the FTSE Global All Cap ex US Index thereafter) / 24% Spliced Barclays US Aggregate Float-Adjusted Bond Index/ 15% Barclays US Treasury Inflation-Protected Securities Index / 8% US REIT Spliced Index (equal to MSCI US REIT Index adjusted for a 2% cash position through 4/30/2009; MSCI US REIT Index thereafter. After 12/31/2020: 33% Spliced Total Stock Mkt Index / 21% Spliced Total International Composite Index / 30% Spliced Barclays US Aggregate Float-Adjusted Bond Index 10% Bloomberg Barclays Global Aggregate ex-USD RIC Capped Hedged / 6% US REIT Spliced Index.

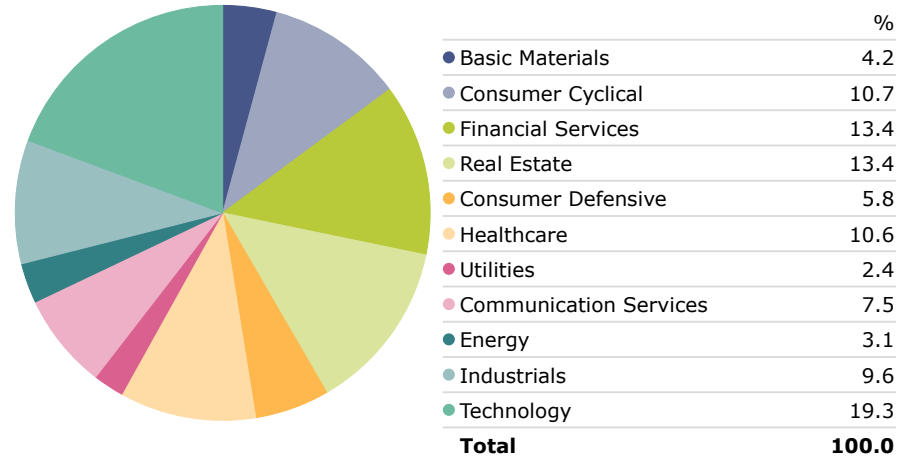
The performance data shown represent past performance, which is not a guarantee of future results. Investment returns and principal value will fluctuate, so investors' shares, when sold, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data cited. Returns are net of the fund expense ratio, gross of advisory fees. Returns represent the historical performance for a Vanguard composite based on the strategy holdings listed above.

Source: Morningstar Direct

PARS Investment Partnership - Balanced Strategy

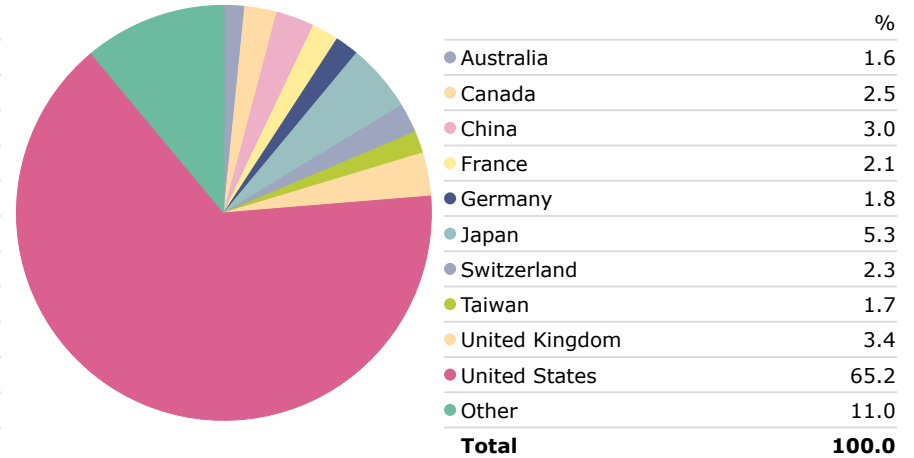
Equity sectors

Date: 12/31/2021



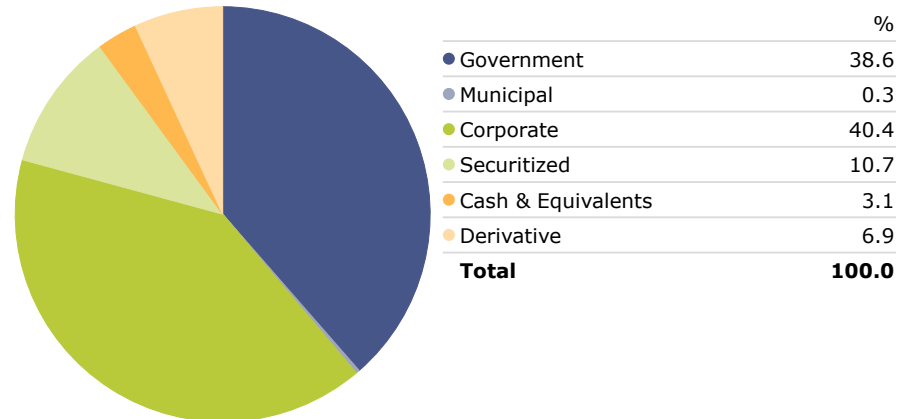
Equity country exposure

Date: 12/31/2021



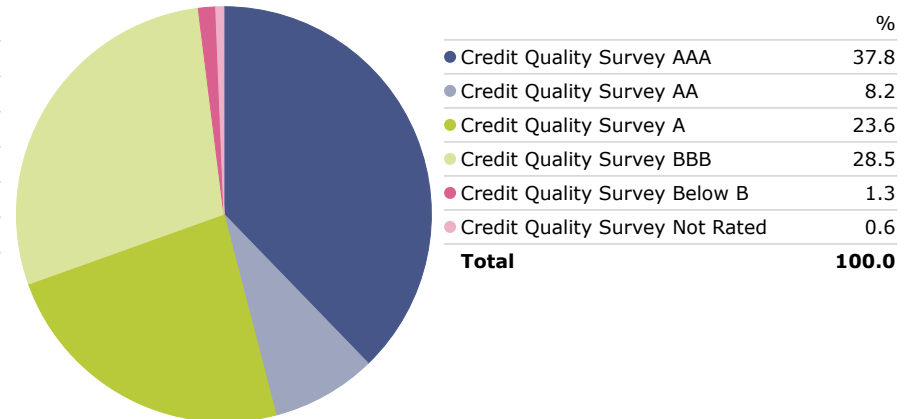
Fixed income sectors

Date: 12/31/2021



Fixed income credit quality

Date: 12/31/2021



Source: Morningstar Direct

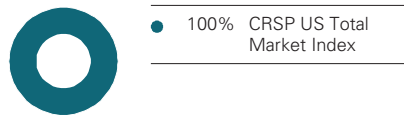


Vanguard Total Stock Market Index Fund (VTSAX)

Investment approach

- Seeks to track the performance of the CRSP US Total Market Index.
- Large, mid-, and small-cap equity diversified across growth and value styles.
- Passively managed, using index sampling.
- Fund remains fully invested.
- Low expenses minimize net tracking error.

Share of U.S. stock market (%)



As measured by the MSCI US Broad Market Index.

Key facts

Expense ratio as of 04/29/2021	4 bps
As reported in the most recent prospectus.	
Designation	Domestic large-cap blend
Fund inception date	04/27/1992
Admiral™ Shares inception date	11/13/2000
Total net assets as of 12/31/2021 (\$M)	\$1,373,413
Net fund assets for VTSAX as of 12/31/2021 (\$M)	\$341,733
Holdings	4,139
Indexed to	CRSP US Total Market Index (CRSPTMT)
Turnover rate (fiscal year-end 12/31/2021)	2.8%
CUSIP	922908728
Investment manager	Vanguard Equity Index Group

Risk and volatility

	R ²	Beta
Primary benchmark	1.00	1.00
Broad-based benchmark	1.00	1.00

R-squared and beta are calculated from trailing 36-month fund returns relative to the associated benchmark.
Broad-based benchmark: Dow Jones U.S. Total Stock Market Float Adjusted Index.

Performance



	Quarter-end	Year-to-date	1-year	3-year	5-year	10-year
Fund	9.16%	25.71%	25.71%	25.77%	17.98%	16.29%
Benchmark	9.16%	25.72%	25.72%	25.79%	18.00%	16.31%
+/- Benchmark	0.00%	-0.01%	-0.01%	-0.02%	-0.02%	-0.02%

Spliced Total Stock Market Index: Dow Jones U.S. Total Stock Market Index (formerly known as the Dow Jones Wilshire 5000 Index) through April 22, 2005; MSCI US Broad Market Index through June 2, 2013; and CRSP US Total Market Index thereafter.

Performance versus competitors

Percentage of Multi-Cap Core Funds outperformed by VTSAX



Source: Lipper, a Thomson Reuters Company. Based on total returns as of December 31, 2021. Number of funds in category: 1-year, 561; 3-year, 521; 5-year, 472; 10-year, 325. Only funds with a minimum one-, three-, five-, or ten-year history, respectively, were included in the comparison. Results will vary for other time periods.

The performance data shown represent past performance, which is not a guarantee of future results. Investment returns and principal value will fluctuate, so investors' shares, when sold, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data cited. For performance data current to the most recent month-end, visit our website at vanguard.com/performance. The performance of an index is not an exact representation of any particular investment, as you cannot invest directly in an index.

Figures for periods of less than one year are cumulative returns. All other figures represent average annual returns. Performance figures include the reinvestment of all dividends and any capital gains distributions. All returns are net of expenses.

All data as of December 31, 2021, unless otherwise noted.

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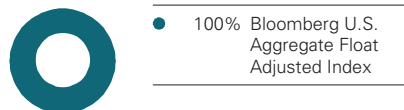


Vanguard Total Bond Market Index Fund (VBTLX)

Investment approach

- Seeks to track the performance of the Bloomberg U.S. Aggregate Float Adjusted Index.
- Broad exposure to the investment-grade U.S. bond market.
- Passively managed using index sampling.
- Intermediate-duration portfolio.
- Provides moderate current income with high credit quality.

Share of U.S. bond market (%)



As measured by the Bloomberg U.S. Aggregate Bond Index.

Key facts

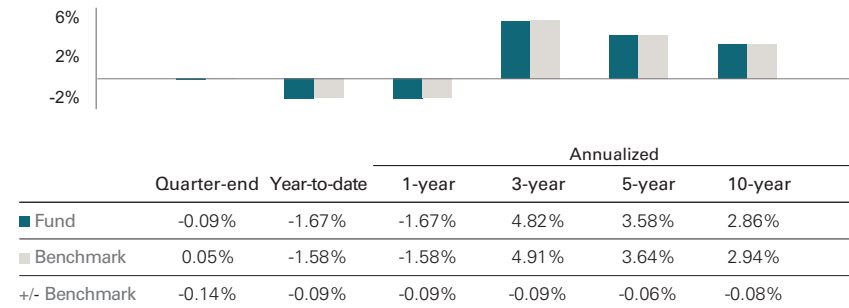
Expense ratio as of 04/29/2021	5 bps
As reported in the most recent prospectus.	
Designation	Treasury/agency/blend intermediate-term
Fund inception date	12/11/1986
Admiral™ Shares inception date	11/12/2001
Total net assets as of 12/31/2021 (\$M)	\$316,331
Net fund assets for VBTLX as of 12/31/2021 (\$M)	\$116,296
Holdings	10,161
Indexed to	Bloomberg U.S. Aggregate Float Adjusted Index (I20984US)
Turnover rate (fiscal year-end 12/31/2021)	34.4%
CUSIP	921937603
Investment manager	Vanguard Fixed Income Group

Risk and volatility

	R ²	Beta
Primary benchmark	0.99	1.01
Broad-based benchmark	0.99	1.01

R-squared and beta are calculated from trailing 36-month fund returns relative to the associated benchmark.
Broad-based benchmark: Spliced Bloomberg U.S. Aggregate Float Adjusted Index.

Performance



Spliced Bloomberg U.S. Aggregate Float Adjusted Index: Bloomberg U.S. Aggregate Bond Index through December 31, 2009; Bloomberg U.S. Aggregate Float Adjusted Index thereafter.

Performance versus competitors

Percentage of Core Bond Funds outperformed by VBTLX



Source: Lipper, a Thomson Reuters Company. Based on total returns as of December 31, 2021. Number of funds in category: 1-year, 489; 3-year, 464; 5-year, 417; 10-year, 315. Only funds with a minimum one-, three-, five-, or ten-year history, respectively, were included in the comparison. Results will vary for other time periods.

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Vanguard Total International Bond Index Fund (VTABX)

Investment approach

- Seeks to track the performance of the Bloomberg Global Aggregate ex-USD Float Adjusted RIC Capped Index (USD Hedged).
- Employs hedging strategies that seek to mitigate uncertainty in exchange rates.
- Passively managed, using index sampling.
- Fund remains fully invested.
- Broad exposure across major bond markets outside of the United States.
- Low expenses minimize net tracking error.

Key facts

Expense ratio as of 02/26/2021	11 bps
As reported in the most recent prospectus.	
Designation	International/global intermediate-term
Fund inception date	05/31/2013
Admiral™ Shares inception date	05/31/2013
Total net assets as of 12/31/2021 (\$M)	\$117,786
Net fund assets for VTABX as of 12/31/2021 (\$M)	\$29,085
Holdings	6,507
Indexed to	Bloomberg Global Aggregate ex-USD Float Adjusted RIC Capped Index (Hedged) (H28986US)
Turnover rate (fiscal year-end 10/31/2021)	12.5%
CUSIP	92203J308
Investment manager	Vanguard Fixed Income Group

Risk and volatility

	R ²	Beta
Primary benchmark	1.00	1.00
Broad-based benchmark	0.33	0.36

R-squared and beta are calculated from trailing 36-month fund returns relative to the associated benchmark. Broad-based benchmark: Bloomberg Global Aggregate Bond Index ex USD.

Performance

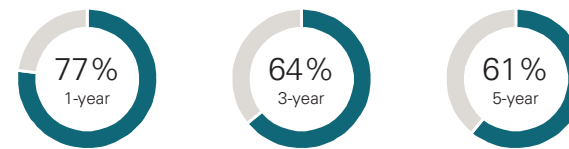


	Quarter-end	Year-to-date	1-year	3-year	5-year	*Since inception
Fund	-0.21%	-2.22%	-2.22%	3.31%	3.05%	3.44%
Benchmark	-0.12%	-2.10%	-2.10%	3.48%	3.24%	3.67%
+/- Benchmark	-0.09%	-0.12%	-0.12%	-0.17%	-0.19%	-0.23%

* Since fund's inception, May 31, 2013.

Performance versus competitors

Percentage of International Income Funds outperformed by VTABX



Source: Lipper, a Thomson Reuters Company. Based on total returns as of December 31, 2021. Number of funds in category: 1-year, 92; 3-year, 88; 5-year, 77. Only funds with a minimum one-, three-, or five-year history, respectively, were included in the comparison. Results will vary for other time periods.

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Vanguard Intermediate-Term Investment-Grade Fund (VFIDX)

Investment approach

- Intermediate-term, investment-grade fixed income securities.
- Seeks moderate and sustainable current income.
- Invests primarily in (investment-grade) corporate bonds.
- Approach focused on intensive credit analysis and risk control.

Fund advisors



100% Vanguard Fixed Income Group

Key facts

Expense ratio as of 10 bps
05/28/2021

As reported in the most recent prospectus.

Designation Investment-grade corporate intermediate-term

Fund inception date 11/01/1993

Admiral™ Shares inception date 02/12/2001

Total net assets as of 12/31/2021 (\$M) \$37,049

Net fund assets for VFIDX as of 12/31/2021 (\$M) \$35,068

Holdings 2,049

Benchmarked to Bloomberg U.S. 5–10 Year Credit Bond Index (l00648)

Turnover rate (fiscal year-end 01/31/2021) 63.0%

CUSIP 922031810

Risk and volatility

	R ²	Beta
Primary benchmark	0.95	0.69
Broad-based benchmark	0.70	1.15

R-squared and beta are calculated from trailing 36-month fund returns relative to the associated benchmark.
Broad-based benchmark: Bloomberg U.S. Aggregate Bond Index.

Performance



	Quarter-end	Year-to-date	Annualized			
			1-year	3-year	5-year	10-year
Fund	-0.40%	-1.14%	-1.14%	6.44%	4.59%	4.21%
Benchmark	-0.38%	-1.57%	-1.57%	7.07%	4.99%	4.69%
Spliced Core Bond Funds Average	-0.18%	-1.29%	-1.29%	5.11%	3.61%	3.10%

Performance versus competitors

Percentage of Core Bond Funds outperformed by VFIDX



Source: Lipper, a Thomson Reuters Company. Based on total returns as of December 31, 2021. Number of funds in category: 1-year, 489; 3-year, 464; 5-year, 417; 10-year, 315. Only funds with a minimum one-, three-, five-, or ten-year history, respectively, were included in the comparison. Results will vary for other time periods.

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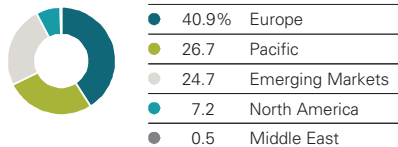


Vanguard Total International Stock Index Fund (VTIAX)

Investment approach

- Seeks to track the performance of the FTSE Global All Cap ex US Index.
- Broad exposure across developed and emerging non-U.S. equity markets.
- Passively managed.
- Fund remains fully invested.
- Low expenses minimize net tracking error.

Regional diversification



Key facts

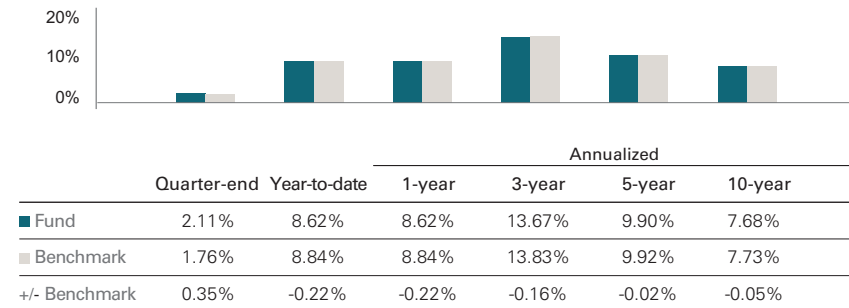
Expense ratio as of 02/26/2021	11 bps
As reported in the most recent prospectus.	
Designation	International/global blend
Fund inception date	04/29/1996
Admiral™ Shares inception date	11/29/2010
Total net assets as of 12/31/2021 (\$M)	\$418,933
Net fund assets for VTIAX as of 12/31/2021 (\$M)	\$79,365
Holdings	7,742
Indexed to	FTSE Global All Cap ex US Index (TGPVAN17)
Turnover rate (fiscal year-end 10/31/2021)	2.9%
CUSIP	921909818
Investment manager	Vanguard Equity Index Group

Risk and volatility

	R ²	Beta
Primary benchmark	0.99	1.00
Broad-based benchmark	0.99	1.00

R-squared and beta are calculated from trailing 36-month fund returns relative to the associated benchmark.
Broad-based benchmark: FTSE Global All Cap ex US Index.

Performance



Spliced Total International Stock Index: Total International Composite Index through August 31, 2006; MSCI EAFE + Emerging Markets Index through December 15, 2010; MSCI ACWI ex USA IMI Index through June 2, 2013; and FTSE Global All Cap ex US Index thereafter. Benchmark returns are adjusted for withholding taxes.

Performance versus competitors

Percentage of International Funds outperformed by VTIAX



Source: Lipper, a Thomson Reuters Company. Based on total returns as of December 31, 2021. Number of funds in category: 1-year, 1498; 3-year, 1361; 5-year, 1186; 10-year, 796. Only funds with a minimum one-, three-, five-, or ten-year history, respectively, were included in the comparison. Results will vary for other time periods.

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Vanguard Short-Term Investment-Grade Fund (VFSUX)

Investment approach

- Short-term, investment-grade fixed income securities.
- Seeks current income with limited price volatility.
- At least 80% invested in short-term and intermediate-term investment-grade fixed income securities, primarily corporate bonds; invests primarily in (investment-grade) corporate bonds.
- Approach focused on intensive credit analysis and risk control.
- Lower interest rate volatility than the broad U.S. fixed income market.

Key facts

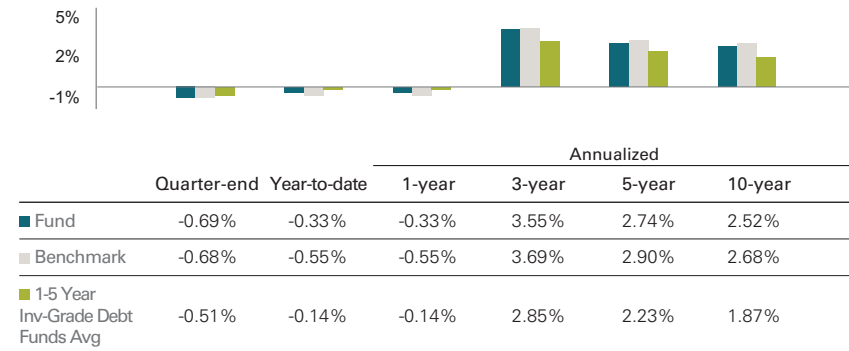
Expense ratio as of 05/28/2021	10 bps
As reported in the most recent prospectus.	
Designation	Investment-grade corporate short-term
Fund inception date	10/29/1982
Admiral™ Shares inception date	02/12/2001
Total net assets as of 12/31/2021 (\$M)	\$78,103
Net fund assets for VFSUX as of 12/31/2021 (\$M)	\$55,258
Holdings	2,414
Benchmarked to	Bloomberg U.S. 1–5 Year Credit Bond Index (I00643)
Turnover rate (fiscal year-end 01/31/2021)	86.3%
CUSIP	922031836

Risk and volatility

	R ²	Beta
Primary benchmark	0.99	1.01
Broad-based benchmark	0.37	0.50

R-squared and beta are calculated from trailing 36-month fund returns relative to the associated benchmark. Broad-based benchmark: Bloomberg U.S. Aggregate Bond Index.

Performance



Performance versus competitors

Percentage of 1-5 Year Inv-Grade Debt Funds outperformed by VFSUX



Source: Lipper, a Thomson Reuters Company. Based on total returns as of December 31, 2021. Number of funds in category: 1-year, 516; 3-year, 482; 5-year, 420; 10-year, 285. Only funds with a minimum one-, three-, five-, or ten-year history, respectively, were included in the comparison. Results will vary for other time periods.

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Fund advisors



- 100% Vanguard Fixed Income Group

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Vanguard Real Estate Index Fund (VGSLX)

Investment approach

- Seeks to track the performance of the MSCI US Investable Market Real Estate 25/50 Index.
- Equity real estate investment trusts.
- Passively managed, full-replication approach.
- Low expenses minimize net tracking error.

Key facts

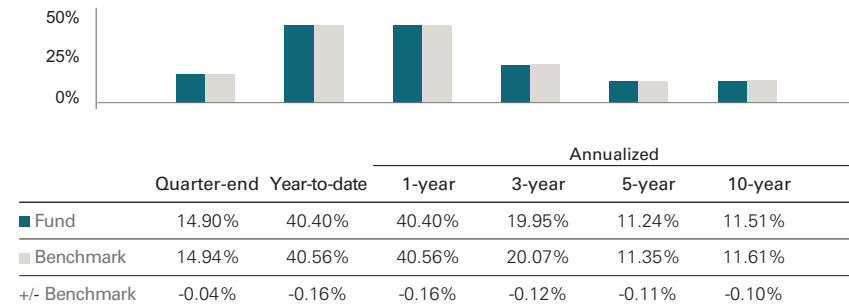
Expense ratio as of 05/28/2021	12 bps
As reported in the most recent prospectus.	
Designation	Sector/specialized
Fund inception date	05/13/1996
Admiral™ Shares inception date	11/12/2001
Total net assets as of 12/31/2021 (\$M)	\$91,479
Net fund assets for VGSLX as of 12/31/2021 (\$M)	\$28,041
Holdings	168
Indexed to	MSCI US Investable Market Real Estate 25/50 Index (M2CXVGD)
Turnover rate (fiscal year-end 01/31/2021)	6.1%
CUSIP	921908877
Investment manager	Vanguard Equity Index Group

Risk and volatility

	R ²	Beta
Primary benchmark	1.00	1.00
Broad-based benchmark	0.68	0.85

R-squared and beta are calculated from trailing 36-month fund returns relative to the associated benchmark. Broad-based benchmark: Dow Jones U.S. Total Stock Market Float Adjusted Index.

Performance



Real Estate Spliced Index: MSCI US REIT Index adjusted to include a 2% cash position (Lipper Money Market Average) through April 30, 2009; MSCI US REIT Index through February 1, 2018; MSCI US Investable Market Real Estate 25/50 Transition Index through July 24, 2018; MSCI US Investable Market Real Estate 25/50 Index thereafter.

Performance versus competitors

Percentage of Real Estate Funds outperformed by VGSLX



Source: Lipper, a Thomson Reuters Company. Based on total returns as of December 31, 2021. Number of funds in category: 1-year, 226; 3-year, 210; 5-year, 185; 10-year, 136. Only funds with a minimum one-, three-, five-, or ten-year history, respectively, were included in the comparison. Results will vary for other time periods.

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Public Agency Retirement Services

4Q 2021 Review

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Advice services offered through Vanguard Institutional Advisory Services® are provided by Vanguard Advisers, Inc., a registered investment advisor.

Asset allocation forecasts

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Prepared for PARS

Vanguard strategies

Investments (return seeking / risk reducing)	Fixed Income Strategy (0/100)	Conservative Strategy (40/60)	Balanced Strategy (60/40)	Growth Strategy (75/25)
Total Equity	-	36%	54%	67%
● Total Stock Market Index	-	22%	33%	41%
● Total International Stock Market Index	-	14%	21%	26%
Total Fixed Income	100.0%	60%	40%	25%
● Total Bond Market Index	45%	23%	15%	10%
● Total International Bond Market Index	25%	15%	10%	5%
● Intermediate-Term Investment Grade Fund	15%	14%	10%	7%
● Short-Term Investment Grade Fund	15%	8%	5%	3%
Total Real Estate	-	4%	6%	8%
● Real Estate Index	-	4%	6%	8%
Total weighted average expense ratio	0.08%	0.08%	0.08%	0.08%
Vanguard Advisory fee	0.02%	0.02%	0.02%	0.02%
All-in fee	0.10%	0.10%	0.10%	0.10%



Data as of September 30, 2021.

Tracking #: 1591785 Expiration date: 7/17/2022

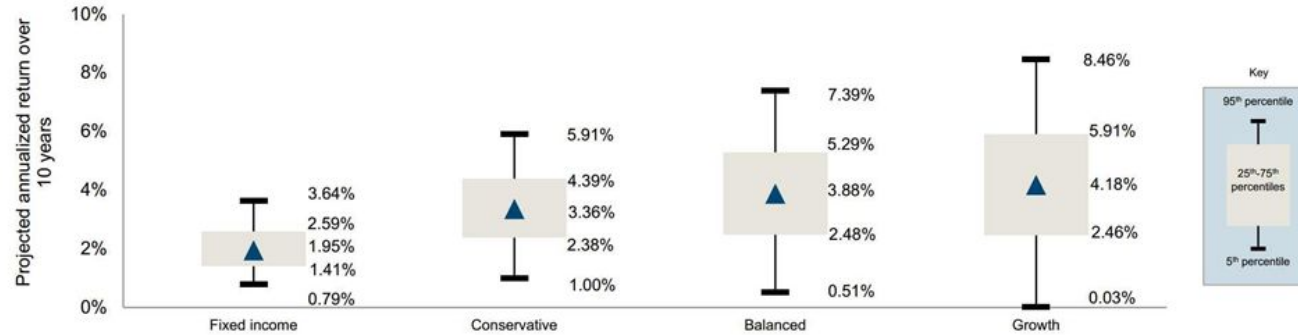
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Asset allocation analysis: 10-year outlook

Asset classes	Fixed income	Conservative	Balanced	Growth
U.S. Equity	-	22%	33%	41%
Non U.S. Equity	-	14%	21%	26%
REITs	-	4%	6%	8%
U.S. Aggregate Bonds	45%	23%	15%	10%
Non U.S. Bonds	25%	15%	10%	5%
Intermediate-Term Credit	15%	14%	10%	7%
Short-Term Credit	15%	8%	5%	3%
Median expected outcomes				
Returns	1.95%	3.36%	3.88%	4.18%
Volatility	3.73%	6.46%	9.45%	11.82%
Sharpe ratio	0.08	0.26	0.25	0.25
EQ/FI/REITS (%)	0/100/0	36/60/4	54/40/6	67/25/8

Portfolio nominal return distributions (10-year horizon)



IMPORTANT: The projections or other information generated by the Vanguard Capital Markets Model®(VCMM) regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Distribution of return outcomes from VCMM derived from 10,000 simulations for U.S. equity returns and fixed income returns. Simulations as of September 30, 2021. Results from the model may vary with each use and over time. For more information on VCMM, see the Important Information slide.

Note: Returns, real returns, and Sharpe ratio listed above represent the median value for 10,000 scenarios. The Sharpe ratio calculates return (or reward) per unit of risk; $(R_x - r_f) / \sigma(R_x - r_f)$; R_f = cash. The risk-free rate is based on VCMM's projections for cash.

Source: Vanguard, Investment Strategy Group.

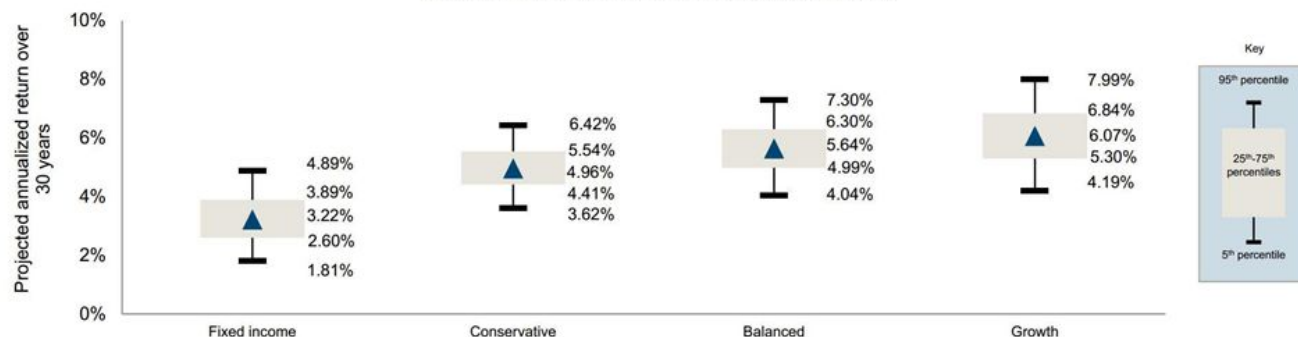
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Asset allocation analysis: 30-year outlook

Asset classes	Fixed income	Conservative	Balanced	Growth
U.S. Equity	-	22%	33%	41%
Non U.S. Equity	-	14%	21%	26%
REITs	-	4%	6%	8%
U.S. Aggregate Bonds	45%	23%	15%	10%
Non U.S. Bonds	25%	15%	10%	5%
Intermediate-Term Credit	15%	14%	10%	7%
Short-Term Credit	15%	8%	5%	3%
Median expected outcomes				
Returns	3.22%	4.96%	5.64%	6.07%
Volatility	4.20%	6.83%	9.92%	12.39%
Sharpe ratio	0.16	0.37	0.34	0.33
EQ/FI/REITS (%)	0/100/0	36/60/4	54/40/6	67/25/8

Portfolio nominal return distributions (30-year horizon)



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Source: Vanguard, Investment Strategy Group.

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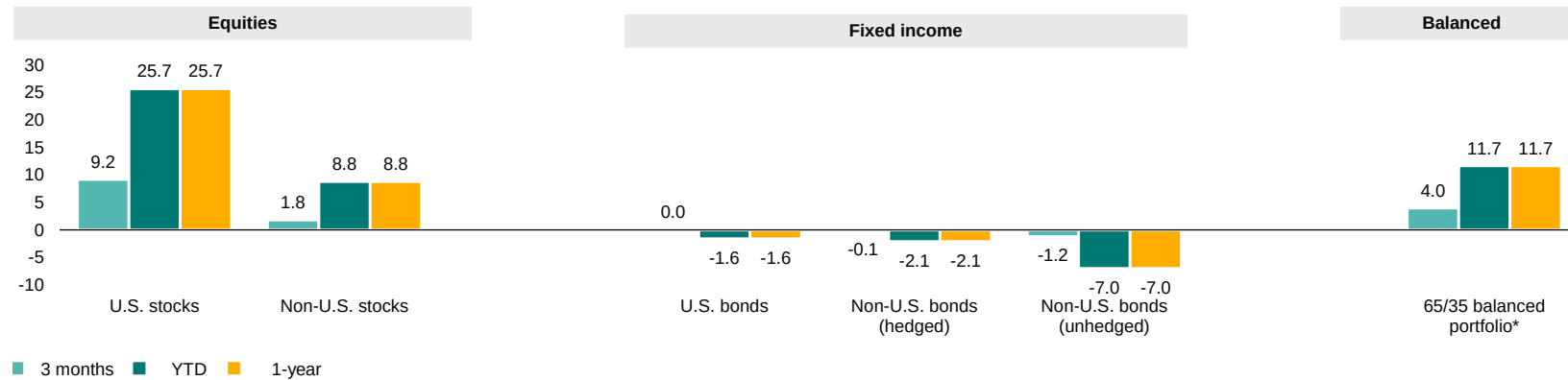
4Q performance review

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U.S. stocks continued to hit fresh highs, despite uncertainty entering 2022

- Both domestic and international equities ended the quarter and year positively, with U.S. stocks setting multiple record highs to cap off the last few weeks of the 2021. Non-U.S. stocks reversed losses experienced in November, despite concerns of lockdowns and travel restrictions over the Omicron variant.
- Inflation continues to dominate headlines as the Consumer Price Index (CPI) experienced a 6.5% increase in November, the highest since 1982. In response to inflation pressures, Fed Chairman Jerome Powell indicated after the December 15th Fed meeting that they are likely to wind-down their bond-buying program by March 2022 and penciled in three rate hikes this year.

Global market returns as of December 31, 2021 (%)



Past performance is no guarantee of future returns. The performance of an index is not an exact representation of any particular investment, as you cannot invest directly in an index.

Sources: Bloomberg, CRSP, and FTSE.

U.S. stocks (CRSP U.S. Total Market Index), non-U.S. stocks (FTSE Global All-Cap ex-US Index), U.S. bonds (Bloomberg U.S. Aggregate Float Adjusted Index), non-U.S. bonds hedged (Bloomberg Global Aggregate ex-USD Float Adjusted RIC Capped Index hedged), non-U.S. bonds unhedged (Bloomberg Global Aggregate Index ex USD).

* 65/35 balanced portfolio Static Composite (39% U.S. stocks, 26% international stocks, and 24.5% investment-grade U.S. bonds, 10.5% investment-grade international bonds).

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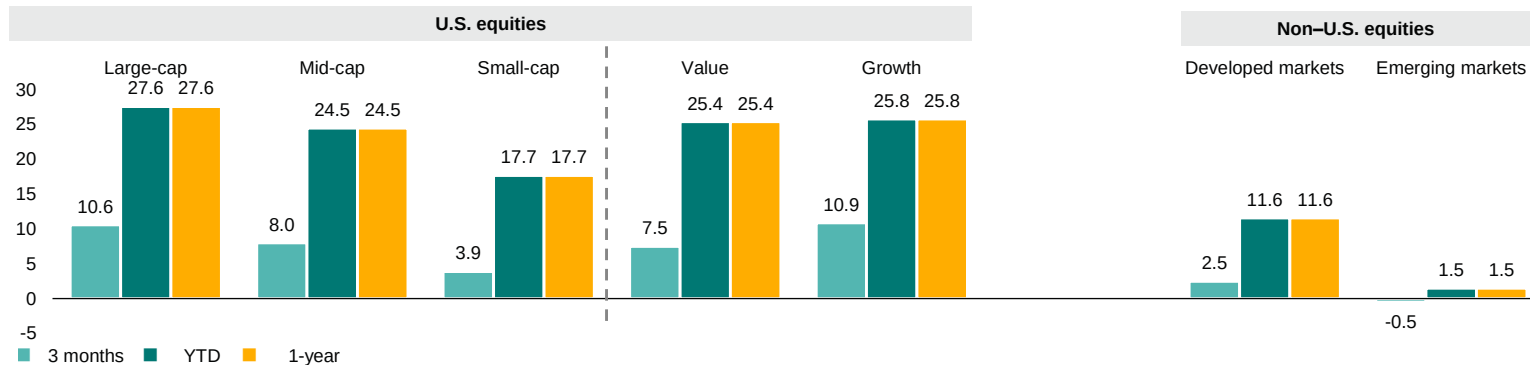
Expiration date: 7/12/2023



International markets lag domestic stocks

- An impressive year for U.S. equity markets as re-opening optimism, strong corporate earnings and continued fiscal stimulus led to an exceptional year across the board. While small-cap and value stocks started the first half of the year strong, growth and large-cap stocks ultimately outperformed in 2021
- Ex-U.S. markets lagged domestic stocks for the year, continuing a trend of underperformance seen for over 14 years. International stock's price-to-earnings discount vs. U.S. stocks have expanded to the widest levels seen in 20 years.
- Emerging Markets have experienced most of the underperformance given the lag in broad vaccine distribution, Chinese regulatory risk, economic troubles in Turkey, and a stronger U.S. dollar on the back of rising U.S. yields. Developed ex-U.S. markets bias towards cyclical sectors that were also challenged during the emergence of the Delta and Omicron variant during the latter half of this year.

Global equity market returns as of December 31, 2021 (%)



Past performance is no guarantee of future returns. The performance of an index is not an exact representation of any particular investment, as you cannot invest directly in an index.

Sources: CRSP, FTSE, and Russell. Large-cap (CRSP U.S. Mega Cap Index), mid-cap (CRSP U.S. Mid Cap Index), small-cap (CRSP U.S. Small Cap Index); value (Russell 3000 Value Index), growth (Russell 3000 Growth Index); developed markets (FTSE Developed All Cap ex-U.S. Index), emerging markets (FTSE Emerging Markets All Cap China A Inclusion Index).

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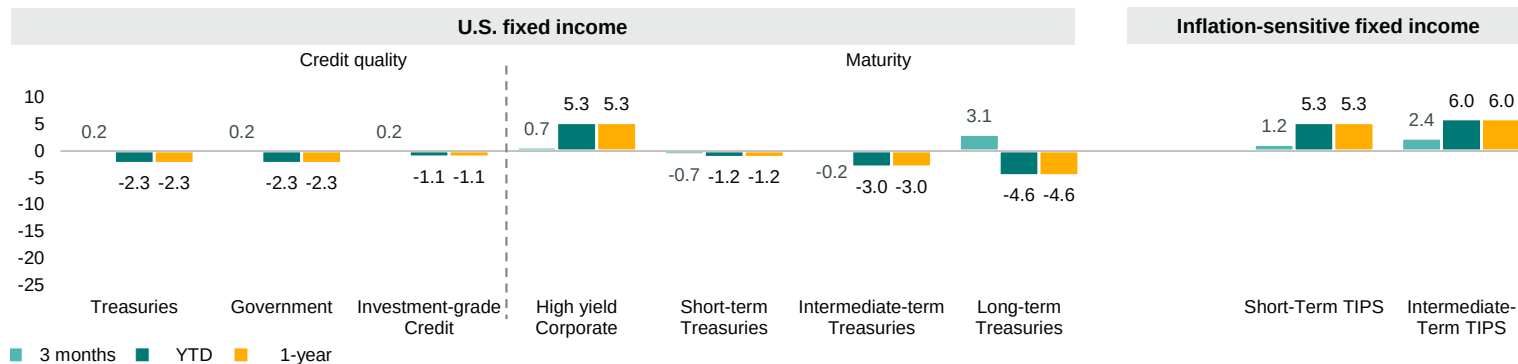
Expiration date: 7/12/2023



The dollar reaches its highest level since November, tracking the rise in Treasury yields

- The Treasury yield curve flattened during the quarter as short- and intermediate-term yields rose on anticipated rate hikes, while longer-term yields declined due to uncertainty on growth and inflation, boosting quarterly returns for long-term Treasuries.
- High-yield bonds experienced stellar returns in 2021, driven by a rebounding economy and investors' demand for yield in this ultra-low interest rate environment. Against this backdrop, junk bond issuances were at an all-time high during the past year driven in part by many first time issuers looking to lock in relatively cheap financing.
- Continuous elevated inflation figures provided a performance tailwind for both intermediate- and short-term TIPS during the past year.

Domestic fixed income market returns as of December 31, 2021 (%)



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Source: Bloomberg.

Treasuries, government, investment-grade credit; high-yield (Bloomberg U.S. Treasury/Government/Credit/Corporate High-Yield Indices); short-inter-long-term Treasuries (Bloomberg U.S. 1-5/5-10/Long Treasury Indices); short-term TIPS (Bloomberg U.S. Treasury 0-5 Year Inflation-Protected Index); intermediate-term TIPS (Bloomberg U.S. Treasury Inflation-Protected Index).

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Slide ID #: S056799

Tracking #: 1995014 195777

Expiration date: 7/12/2023



Market outlook

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10

Vanguard December 2021 market and economic outlook at a glance

Key takeaways:

- Vanguard expects the U.S. economic recovery to continue in 2022, though at a naturally slower pace.
- The Fed's tapering program sets the stage for what Vanguard believes will be a late 2022 interest rate hike.
- We foresee inflation persisting above 2% toward the end of 2022, but broad wage gains taking hold

Asset-class return outlooks

The greatest change in our outlooks from the June 30 running of the Vanguard Capital Markets Model® (VCMM) was in emerging markets equities. Large price declines in the intervening months lowered valuations, which are reflected in a 10-year forecast range that is 60 basis points higher in the September 30 running. In fixed income, yields increased marginally in the third quarter, allowing for a marginal rise in forecasts for many fixed income sub-asset classes.

Our 10-year, annualized, nominal return projections, as of September 30, 2021, are shown below. Please note that the figures are based on a 1.0-point range around the rounded 50th percentile of the distribution of return outcomes for equities and a 0.5-point range around the rounded 50th percentile for fixed income.

Equities	Return projection	Median volatility
U.S. equities	2.3%–4.3%	16.7%
U.S. value	3.1%–5.1%	19.2%
U.S. growth	–0.9%–1.1%	17.5%
U.S. large-cap	2.2%–4.2%	16.3%
U.S. small-cap	2.2%–4.2%	22.5%
U.S. real estate investment trusts	1.9%–3.9%	19.1%
Global equities ex-U.S. (unhedged)	5.2%–7.2%	18.4%
Global ex-U.S. developed markets equities (unhedged)	5.3%–7.3%	16.4%
Emerging markets equities (unhedged)	4.2%–6.2%	26.8%

Fixed income	Return projection	Median volatility
U.S. aggregate bonds	1.4%–2.4%	4.6%
U.S. Treasury bonds	1.2%–2.2%	4.7%
U.S. credit bonds	1.6%–2.6%	4.7%
U.S. high-yield corporate bonds	2.2%–3.2%	10.4%
U.S. Treasury Inflation- Protected Securities	1.0%–2.0%	7.0%
U.S. cash	1.2%–2.2%	1.2%
Global bonds ex-U.S. (hedged)	1.3%–2.3%	3.8%
Emerging markets sovereign bonds	2.3%–3.3%	10.1%
U.S. Inflation	1.5%–2.5%	2.3%

These probabilistic return assumptions depend on current market conditions and, as such, may change over time.

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Source: Vanguard Investment Strategy Group.

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Vanguard December 2021 market and economic outlook at a glance



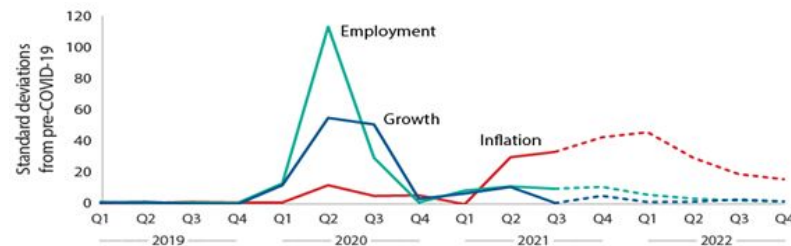
The U.S. recovery continues but pace slackens

United States. Growth appears to have stabilized in the fourth quarter as COVID-19 cases have come down from their third-quarter peaks, and we continue to see fourth-quarter growth around 5.5%.

We expect economic recovery to continue in 2022, though at a naturally slower pace as the easiest gains will already have been captured. We foresee growth of around 4% for 2022. Conditions for continuing U.S. growth look favorable, even relative to pre-pandemic conditions.

Unlike the abrupt shutdown of the economy early in the pandemic, the reopening has been a more drawn-out process and, as such, the near term will continue to be excessively volatile, adding a high degree of uncertainty to the longer-run implications (see figure).

The key drivers of U.S. inflation are sending mixed signals



Notes: The chart depicts the absolute difference in standard deviation of observed readings from the 2019 trend. Dotted lines represent Vanguard forecasted values.

Sources: Vanguard forecast and calculations, based on Refinitiv data. As of November 12, 2021.

Euro area. Vanguard expects the pace of growth to moderate, a natural slowing at this stage of economic recovery from the pandemic.

- COVID-19 continues to be a concern—new cases topped 50,000 in Germany for the first time on November 11—and high energy prices weigh on household finances.
- A rapid unwinding of supply bottlenecks that would boost manufacturing represents a risk to the upside, one especially pertinent to the euro area.
- Vanguard continues to see full-year 2021 euro area growth around 5% and 2022 growth around 4%.

China. We foresee growth in the fourth quarter of around 1% compared with the third quarter, below trend, and of around 5% for all of 2022, below market expectations for growth around 5.5%.

- We expect consumption recovery to remain muted, the property downturn to deepen, and infrastructure investment to accelerate only after the National People's Congress in March.
- We expect the government to target growth around 5.5% for 2022; as such, we anticipate that it will need to tolerate an undershoot of its target or to introduce further stimulus measures.

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Vanguard December 2021 market and economic outlook at a glance



Region-by-region
outlook
(continue)

Emerging markets. Positive health developments lead Vanguard to hold an above-consensus view on 2022 growth in emerging markets of around 5.5% in 2022.

- We anticipate that Latin America and emerging Asia, regions with high vaccine acceptance, will have vaccinated almost all eligible individuals who want to be vaccinated by the end of 2021.
- We expect the percentage of the vaccinated population to lag significantly behind in emerging Europe, where vaccine acceptance is low.
- We foresee vaccination rates in Africa, which have consistently lagged those of other regions, surpassing those in emerging Europe in the first half of 2022.



Setting the
stage for later
action

The Fed begins its tapering program

The gradual removal of pandemic-era monetary policy accommodation in the United States has begun with the Federal Reserve's announcement on November 3 that it would start to scale back its bond-buying program.

- The Fed said it would reduce its purchases of Treasury securities by \$10 billion per month and of agency mortgage-backed securities by \$5 billion per month so that November purchases total \$70 billion and \$35 billion, respectively, with a similar monthly reduction in purchases thereafter.
- At such a pace, the Fed's asset-purchase program will have wound down by the middle of 2022. The Fed said it was prepared to adjust the pace of purchases—up or down—as the economic outlook warranted.
- The move sets the stage for what Vanguard believes will be a late 2022 interest rate hike. If inflation evolves as Vanguard forecasts, it likely has already met its lift-off test and the Fed will turn its attention to the labor market to gauge the appropriate time for a rate hike.

What's next for U.S. government funding?

The threat of a U.S. government shutdown, a U.S. debt default, or both could arise in early December.

- To avoid a shutdown in December, an omnibus appropriations bill funding the discretionary portion of the budget for the remainder of the fiscal year or another continuing resolution would need to be signed.
- Meanwhile, Congress passed and the president on October 14 signed legislation to raise the U.S. debt ceiling by \$480 billion, an amount expected to allow the government to pay its bills until at least December 3.
- The consequences of a U.S. debt default would be enormous—although Vanguard believes a U.S. debt default is unlikely.

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Vanguard December 2021 market and economic outlook at a glance



Wage gains
will be key

Inflation likely to stay above 2%

Vanguard's medium-term outlook for inflation in the United States hasn't materially changed despite a stronger-than-expected reading in October, although near-term inflation is likely to be pressured higher.

- Core Consumer Price Index (CPI), which excludes volatile food and energy prices, reached 0.6% in October and 4.6% year-on-year. Strong readings over recent months have increased the possibility that supply constraints, labor shortages, and the effects of the economy's reopening will take further time to normalize.
- We foresee inflation persisting above 2% toward the end of 2022. A risk that inflation persists at or above 3% by year-end 2022 would depend on broad wage gains taking hold.
- Vanguard sees the likelihood of strong wage gains in certain pandemic-affected sectors such as leisure and hospitality, but we see the risk of such strong gains across all industries as low.



Labor-force
participation
lags

Unemployment continues falling

With inflation likely to have already met the Federal Reserve's criterion for an interest rate hike, we expect labor market developments to command attention in the coming months.

- The unemployment rate fell from 4.8% to 4.6% in October, but we don't expect the Fed to rely solely on that indicator in determining when to raise interest rates.
- Vanguard expects the unemployment rate to continue to fall, to just above 3% by the end of 2022, with labor-force participation peaking perhaps a full percentage point below its pre-pandemic level.

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Appendix

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Note on asset-return distributions



The asset-return distributions shown here represent Vanguard's view on the potential range of risk premiums that may occur over the next 10 years; such long-term projections are not intended to be extrapolated into a short-term view. These potential outcomes for long-term investment returns are generated by the Vanguard Capital Markets Model® (VCMM) and reflect the collective perspective of our Investment Strategy Group. The expected risk premiums—and the uncertainty surrounding those expectations—are among a number of qualitative and quantitative inputs used in Vanguard's investment methodology and portfolio construction process.

IMPORTANT: The projections and other information generated by the VCMM regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Distribution of return outcomes from the VCMM are derived from 10,000 simulations for each modeled asset class.

Simulations are as of September 30, 2021. Results from the model may vary with each use and over time.

For more information, see the Appendix section "About the Vanguard Capital Markets Model."

Important information

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The VCMM projections are based on a statistical analysis of historical data. Future returns may behave differently from the historical patterns captured in the VCMM. More importantly, the VCMM may be underestimating extreme negative scenarios unobserved in the historical period on which the model estimation is based.

The Vanguard Capital Markets Model® is a proprietary financial simulation tool developed and maintained by Vanguard's primary investment research and advice teams. The model forecasts distributions of future returns for a wide array of broad asset classes. Those asset classes include U.S. and international equity markets, several maturities of the U.S. Treasury and corporate fixed income markets, international fixed income markets, U.S. money markets, commodities, and certain alternative investment strategies. The theoretical and empirical foundation for the Vanguard Capital Markets Model is that the returns of various asset classes reflect the compensation investors require for bearing different types of systematic risk (beta). At the core of the model are estimates of the dynamic statistical relationship between risk factors and asset returns, obtained from statistical analysis based on available monthly financial and economic data from as early as 1960. Using a system of estimated equations, the model then applies a Monte Carlo simulation method to project the estimated interrelationships among risk factors and asset classes as well as uncertainty and randomness over time. The model generates a large set of simulated outcomes for each asset class over several time horizons. Forecasts are obtained by computing measures of central tendency in these simulations. Results produced by the tool will vary with each use and over time.

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Investments in bond funds are subject to the risk that an issuer will fail to make payments on time, and that bond prices will decline because of rising interest rates or negative perceptions of an issuer's ability to make payments. Diversification does not ensure a profit or protect against a loss.

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Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
 From: Dr. Chris A. Scott, Executive Director
 Nicole Noska, Principal Transitional Programming
 Middle School and Transitional High School
 Date: April 28, 2022
 Re: 25 Linnell Circle Lease Extension

The Adult Program that is currently occupying 25 Linnell Circle, Billerica and 17 Bridge Street, North Billerica is moving to 11 Executive Drive, North Billerica. The current proposal for the 25 Linnell Circle lease is to use this space for enhanced transitional Middle School and High School programming.

The vision for the Transitional Program space at 25 Linnell Circle is to provide students with hands-on career exploration and life skills development as a stepping stone before entering the community. This therapeutic setting would offer the ideal environment for students to learn how to safely navigate a workplace, while providing the experiences needed to build their soft skills. Students are developing work readiness skills with the goal of gaining supported or competitive employment in the community setting.

In addition to vocational skills, students will also develop their ability to complete functional life skills/tasks with increased independence. This programming was initially developed this past school year at 40 Linnell Circle due to the need for in-house vocational and life skill opportunities during the Covid-19 pandemic. Programming is overseen by the occupational therapists and transition specialists on a daily rotation. This oversight brings cohesive structure and direct modeling of instruction for both support staff and students. An increase in instructional space will allow the expansion of programming, which will promote students' access to future community-based opportunities and post-secondary independent living skills.

We approached the Middlesex County Retirement Board to extend the lease for another 3 years for this programming. Initially the Middlesex County Retirement Board proposed the following rate increases:

	FY 23	FY 24	FY 25
TOTAL ANNUAL RENTAL	\$166,161.88	\$174,469.97	\$183,193.47
Monthly Rental	\$13,846.82	\$14,539.16	\$15,266.12
Per Square Foot	\$18.82	\$19.77	\$20.75

Given the very competitive square footage rate that Valley negotiated at 11 Executive Drive (\$14.20 a square foot in year one) I asked Middlesex County Retirement Board to reconsider the rate increase and asked for a decrease in our current square footage rate, by sharing the following information with the Middlesex County Retirement Board:

The Valley Board of Directors recently negotiated a lease for a facility in North Billerica for programming which is more centrally located for some of the individuals we serve. Given the current vacancy rate of office buildings in Billerica we were able to negotiate a very favorable rate of \$14.20 a square foot in year one. For your reference, I have attached the annual rates and floor plan for this newly renovated facility. We are hoping that we will be able to renew the lease at 25 Linnell Circle – all 8,827 square feet - at the kitchen rate of \$13.44 a square foot.

As such, the Middlesex County Retirement Board is now proposing:

For Year 1, a 0% increase, keeping Valley's annual rent at \$158,249.41. In Years 2 and 3, a 3% increase. The new rates are provided below.

	FY 23	FY 24	FY 25
TOTAL ANNUAL RENTAL	\$158,249.41	\$162,996.89	\$167,886.80
Monthly Rental	\$13,187.45	\$13,583.07	\$13,990.57
Per Square Foot	\$17.93	\$18.47	\$19.02

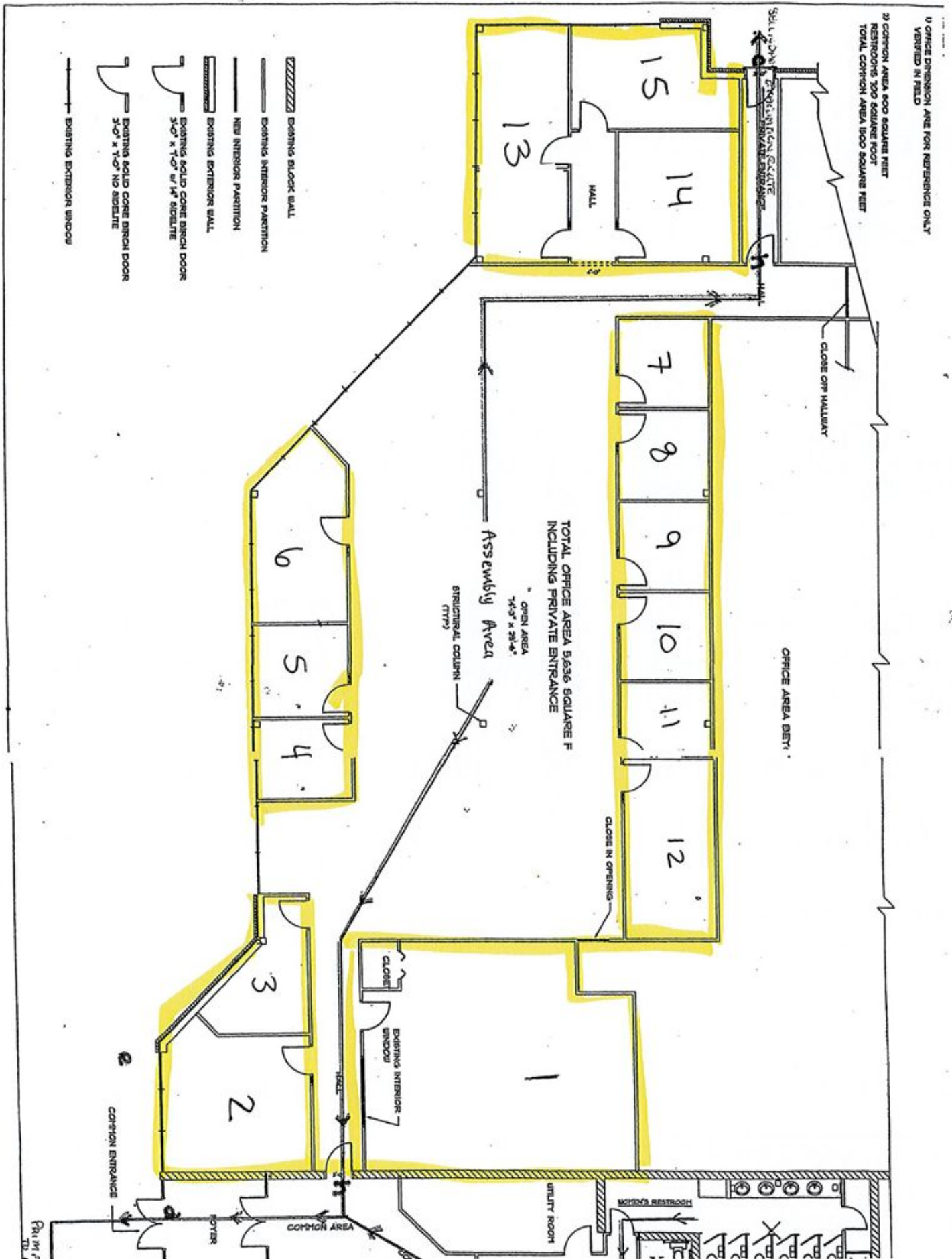
Valley has a very positive relationship and partnership with Middlesex County Retirement Board. I recommend the board vote to proceed with a three-year lease based upon the favorable square footage rates now proposed above.

Action Required:

Yes

Attachment:

25LC Map for Transition Proposal





Transitional Programming

Valley Middle School & Transitional High School

40 Linnell Circle, Billerica, MA 01821 | Tel: (978) 528-7882 | www.valleycollaborative.org

25 Linnell Circle Space Proposal for Transitional Programs (Vocational & Life Skills Programming)

Room #	Title of Room	Skill Focus
1	School Store	<ul style="list-style-type: none"> ➤ Cash Register Skills ➤ Money Skills ➤ Social skills (greeting customers, customer service) ➤ Organizing displays ➤ Labeling items ➤ Replenishing inventory/Stocking Shelves ➤ Tracking inventory as items are purchased
2	Art Room	Students will have the opportunity to work on transitioning between buildings for Art Class with Art Teacher, Libby
3	Tech/Server room	NA
4	Independent Living Skills: Apartment	<ul style="list-style-type: none"> ➤ Cleaning ➤ Sewing ➤ Bill pay ➤ Reviewing inventory list for kitchen goods/items ➤ Making shopping list within a budget ➤ Home maintenance
5	Restaurant Skills	<ul style="list-style-type: none"> ➤ Folding pizza boxes ➤ Refilling salt/pepper shakers ➤ Rolling silverware/napkins ➤ Hostess skills (seating chart, etc.)
6	Central Office Space	NA
7	Sensory Room	Space for students to maintain and/or regain regulation of behaviors/emotions

8	School Store/Art Storage	Organizing and ongoing update of inventory
9	Computer Lab	<ul style="list-style-type: none"> ➤ Resume writing/updating ➤ Email/correspondence with prospective employers ➤ Online job applications ➤ Typing groups or 1:1 ➤ Computer basics ➤ Scheduling appointments ➤ VR Goggles ➤ Z space (3D learning)
10	Assembly Room	Students will utilize Vocational Kits for <ul style="list-style-type: none"> ➤ Sorting ➤ Assembling ➤ Matching
11	Sensory/Motor Room	Space for students to self-regulate with sensory motor activities (trampoline, yoga ball)
12	Office Skills	<ul style="list-style-type: none"> ➤ Clerical skills ➤ Mail sort ➤ Alphabetizing/Collating ➤ Shredding ➤ Laminating
13	Independent Living Skills: Bedroom	<ul style="list-style-type: none"> ➤ Making and unmaking a full size bed ➤ Folding clothes/bedding/linens ➤ Sorting clothes/bedding/linens ➤ Hanging clothes ➤ Putting clothes away into dresser ➤ Travel skills (packing a suitcase) ➤ Ironing ➤ Hygiene kits (students will use a checklist to find appropriate items needed for completing specific hygiene routines)
14	Central Office Space	NA
15	Central Office Space	NA

Valley Collaborative - Lease Space

	<u>SQ FT</u>	<u>Rate/SQ FT</u>	<u>FY'23</u>
11 Executive Park - Office and Programmatic Space	12,000	14.20	\$ 170,400.00

	<u>SQ FT</u>	<u>Rate/SQ FT</u>	<u>FY'22</u>
25 Linnell - main space FY22	7,596	18.45	140,146.20
add five office suite	631	15.91	10,039.21
add Kitchen	600	13.44	8,064.00
	<u>8,827</u>		<u>\$ 158,249.41</u>



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Making a Difference Awards

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

Valley Elementary School

Student of the Month: **Lindsey Lavanga**
Staff of the Month: **Stephanie Davis**

Valley Alternative Programming Middle and High School

Student of the Month: **Adam Conant**
Staff of the Month: **Colleen Vangelist**

Valley Transitional Programming Middle and High School

Student of the Month: **Naomi Trinidad**
Staff of the Month: **Meghan Gervais**

Valley Adult Services

Individual of the Month: **Leo Vahey**
Staff of the Month: **Jonathan Taylor**

Valley Staff of the Month

Mazyar Moshtaghi

Required Action:

None

Attachments:

None



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: 11 Executive Park Drive Update

I am happy to report out that the amendment for 11 Executive Park lease was executed. In summary, Valley Collaborative will be taking occupancy in June 2022. R.J. Kelly has agreed to renovate the research and development (R&D) building into an office building at their expense. As you are aware, I had negotiated a very favorable square footage rate of \$14.20 the first year (and \$17.56 in year 10) as the space was R&D and not office space. We had the understanding R.J. Kelly would convert the building into office and programmatic space. R.J. Kelly had incorrectly assumed Valley would be absorbing the cost of this major renovation by incorporating the majority of this expense into the square footage amortized over ten years.

Valley's current office space on Bridge Street, North Billerica which houses the MRC program is \$22.14 sq./ft. (this lease ends in June) and the majority of the space at 25 Linnell Circle, Billerica which houses our DDS program is \$18.25 sq./ft. (this lease also ends in June). These square footage rates further highlight the favorable rate negotiated for the 11 Executive Park lease. Needless to say, I am very relieved and pleased that the owner of R.J. Kelly, Brandon Kelly, intervened and wanted to support our mission. Again some of the main benefits of this facility are 1. Its more centrally located, 2. Sole-tenancy, 3. Lower transportation costs, 4. Customized programmatic space, 5. All first floor, 6. Closer to vocational business partners, 7. Area for outdoor recreation, and 8. Newly renovated building.

Required Action:

None

Attachments:

Lease Rate Comparison

Valley Collaborative - Lease Space

	<u>SQ FT</u>	<u>Rate/SQ FT</u>	<u>Annual</u>
17 Bridge St Office Space FY22	1,268	22.14	\$ 28,072.00
11 Executive Park - R&D type space	12,000	14.20	\$ 170,400.00
same space at 17 Bridge St rate	12,000	22.14	\$ 265,680.00
same space at 25 Linnell Rate	12,000	18.45	\$ 221,400.00
25 Linnell - main space FY22	7,596	18.45	140,146.20
add five office suite	631	15.91	10,039.21
add Kitchen	600	13.44	8,064.00
	8,827		\$ 158,249.41



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Coordinated Program Review (CPR) Results

I am pleased to report that Valley has concluded its Coordinated Program Review with DESE that began in March 2021 and included three days of onsite review and 24 staff interviews. We were just informed by Christine Romancewicz, DESE Specialized Program Liaison, during our exit interview that from her perspective Valley has achieved an “A+” and will be receiving a final report with no findings. Please find below the reoccurring themes Ms. Romancewicz mentioned during Valley’s exit interview.

- DESE Parent survey results indicated that families were extremely pleased with their child’s placement at Valley, quoting “they have found their home”, “acceptance”, “sense of safety”, etc.
- Staff were very positive and appreciate the administrative support they receive in doing what is best for students
- Staff were very committed to the mission and vision of Valley
- From the paraprofessional in the classroom to the Executive Director and everyone in between, there was a consistent message regarding Valley’s procedures and professional responsibilities and commitment to the students we educate
- Rigorous academic curriculum across all programs was observed
- A supportive culture for both students and staff across all programs was observed
- Therapists, educators, and administrators worked on effective teams to deliver high quality therapeutic services and academics unique to each student at Valley
- Procedural consistency across all programs was noted
- Well trained staff across all programs was observed
- Solid systems in place across all programs to ensure compliance with all state regulations
- The Department was impressed with Valley’s timeout and restraint procedures and that students had the opportunity to de-escalate in various sensory spaces (for example “Chillville”) before a timeout or restraint was needed.
- Incident reports were very detailed and explain in full the incident and the reason and rationale for all actions taken. Furthermore, a full explanation was given if a restraint or timeout room was required for a student to de-escalate.

- Students were quickly reintegrated back into the classroom after various de-escalation techniques were provided resulting in minimal disruption to time on learning which was observed across all programs
- There is no technical support needed from the Department at this time

It is a pleasure to work on such a high performing, committed and caring team. A special thank you to Joia Mercurio, Deputy Director, for her ongoing leadership and support. Valley is very fortunate to have the exemplary program Principals: Nicole Noska, Julie Fielding, Heather MacKay, and Jennifer Bergeron, along with the exceptional teams they have built of educators, therapists, and paraprofessionals. We are so fortunate to have experienced and competent leaders working with our students, families, and staff.

We also gratefully acknowledge all of Valley's support staff for the pride they take in their work which ensures clean and safe learning environments for students and staff: Renato Silva, Ian MacAulay, and Sandy Morency. The buildings have never looked better. We also want to recognize the "behind-the-scenes" hard work and dedication of the Technology Department and Administrative Support Staff: Mazyar Moshtaghi, Donna Suarez, Kelly Fitts, Karen Blackburn, Donna Driscoll and Kathy Diaz.

Completing a program review during a pandemic presents unique challenges. Staffing shortages and health care protocols were constant stressors. Thanks to Kari Morrin, Director of Human Resources, for the countless hours of hard work and dedication she has put into our workforce. Sincere appreciation to Lead Nurse Jessica Scalzi and her team, for their tireless and significant support. Lead Nurse Jessica Scalzi continues to go above and beyond to ensure all COVID procedures and protocols are followed to maintain the health and safety of students and staff.

Last but not least, I would like to thank you, Valley's Board of Directors, for your ongoing guidance and support as we navigate this important and difficult work:

- Mr. Timothy Piwowar - Valley Collaborative Board Chair
 - o Superintendent, Billerica Public Schools
- Dr. Jay Lang - Valley Collaborative Executive Committee Member
 - o Superintendent, Chelmsford Public Schools
- Mr. Steven Stone - Valley Collaborative Board Member
 - o Superintendent, Dracut Public Schools
- Dr. Laura Chesson - Valley Collaborative Board Member
 - o Superintendent, Groton-Dunstable Regional School District
- Dr. Denise Pigeon - Valley Collaborative Executive Committee Member
 - o Superintendent, Nashoba Valley Technical School District
- Mr. Brad Morgan - Valley Collaborative Board Member
 - o Superintendent, North Middlesex Regional School District
- Ms. Brenda Theriault-Regan - Valley Collaborative Board Member
 - o Interim Superintendent, Tewksbury Public Schools
- Dr. Michael Flanagan - Valley Collaborative Executive Committee Member
 - o Superintendent, Tyngsborough Public Schools
- Dr. Christopher Chew - Valley Collaborative Board Member
 - o Superintendent, Westford Public Schools

Your support of Valley's staff and the work we do is continuously demonstrated through various Board votes - most recently the generous longevity package the Board voted in order to address retention and recruitment issues we have struggled with during this pandemic. The Board's ongoing commitment to offering its staff competitive compensation, while maintaining some of the lowest tuition rates in the Commonwealth in a non-union setting, helps to ensure that we can recruit and retain staff that are among the most talented in the field. Also, noteworthy, is your support of robust and well-resourced curriculum ensuring our students are able to reach their full potential. Thank you for the confidence and trust you have in Valley to care for and educate your most vulnerable students. Please know, we are committed to maintaining the highest quality programming for your/our students and to always be deserving of your support.

Thank you.

-Chris

Required Action:
Report

Valley Collaborative

SPECIAL EDUCATION LEGAL STANDARDS, COMPLIANCE RATINGS AND COMMENTS

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Office of Approved Special Education Schools
Valley Collaborative Program Review Report – 04/13/2022
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CRITERION NUMBER	
	Legal Standard
CSE 13 and APD 8.8 – IEP Progress Reports (where applicable)	<p>Progress reports and content</p> <ol style="list-style-type: none"> 1. Parents receive reports on the student's progress toward reaching the goals set in the IEP at least as often as parents are informed of the progress of non-disabled students. 2. Progress report information sent to parents includes written information on the student's progress toward the annual goals in the IEP, including information on the extent to which such progress is sufficient to enable the child to achieve the goals by the end of the year. 3. Where a student's eligibility terminates because the student has graduated from secondary school or exceeded the age of eligibility, the collaborative provides the student with a summary of his or her academic achievement and functional performance, including recommendations on how to assist the student in meeting his or her postsecondary goals. 4. Copies of progress reports shall be maintained in student records, including documentation of persons or agencies receiving such reports. <p>State Requirements 603 CMR 28.07(3)</p> <p>Federal Requirements 34 CFR 300.305(e)(3); 300.320(a)(3)</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	STUDENT IDENTIFICATION AND PROGRAM PLACEMENT
	Legal Standard
CSE 22 and APD 8.5 – Current IEP and Student Roster (where applicable)	<p>IEP implementation and availability</p> <ol style="list-style-type: none"> 1. Where the IEP of the student in need of special education has been accepted in whole or in part by that student's parent, the collaborative provides the mutually agreed upon services without delay. 2. At the beginning of each school year, the collaborative has a current IEP for each enrolled Massachusetts student that has been issued by the responsible public school district and consented to and dated by the student's parent(s) (or the student, when applicable). 3. Each teacher and provider described in the IEP is informed of his or her specific responsibilities related to the implementation of the student's IEP and the specific accommodations, modifications, and supports that must be provided for

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CRITERION NUMBER	STUDENT IDENTIFICATION AND PROGRAM PLACEMENT
	Legal Standard
	<p>the student under it.</p> <p>4. The collaborative does not delay implementation of the IEP due to lack of classroom space or personnel, provides as many of the services on the accepted IEP as possible and immediately informs the responsible school district and parents in writing of any delayed services, reasons for delay, actions that the collaborative is taking to address the lack of space or personnel and offers alternative methods to meet the goals on the accepted IEP. Upon agreement of the responsible school district and parents, the collaborative implements alternative methods immediately until the lack of space or personnel issues are resolved.</p> <p>State Requirements 603 CMR 28.05(7)(b); 28.06(2)(d)(2)</p> <p>Federal Requirements 34 CFR 300.323</p>

Department of Elementary and Secondary Education Comments: Findings:

There are no issues identified for this criterion.

CRITERION NUMBER	PARENT AND COMMUNITY INVOLVEMENT
	Legal Standard
CSE 29	<p>Communications are in English and primary language of home</p> <p>1. Communications with parents are in clear and commonly understood words and are in both English and the primary language of the home if such primary language is other than English. Any interpreter used in fulfilling these requirements is fluent in the primary language of the home and familiar with special education procedures, programs, and services. If the parents or the student are unable to read in any language or are blind or deaf, communications required by these regulations are made orally in English with the use of a foreign language interpreter, in Braille, in sign language, via TTY, or in writing, whichever is appropriate, and all such communications are documented.</p> <p>2. If the collaborative provides notices orally or in some other mode of communication that is not written language, the collaborative keeps written documentation (a) that it has provided such notice in an alternate manner, (b) of the content of the notice and (c) of the steps taken to ensure that the parent understands the content of the notice.</p> <p>State Requirements Federal Requirements</p>

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CRITERION NUMBER	PARENT AND COMMUNITY INVOLVEMENT
	Legal Standard
	603 CMR 28.07(8) 34 CFR 300.322(e); 300.503(c)

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	CURRICULUM AND INSTRUCTION
	Legal Standard
CSE 35	<p>Assistive technology: specialized materials and equipment</p> <p><i>Assistive technology device</i> means any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized, that is used to increase, maintain, or improve the functional capabilities of a student with a disability. The term does not include a medical device that is surgically implanted, or the replacement of such device.</p> <p><i>Assistive technology service</i> means any service that directly assists a student with a disability in the selection, acquisition, or use of an assistive technology device. The term includes:</p> <ol style="list-style-type: none"> 1. The evaluation of the needs of a student with a disability, including a functional evaluation of the student in the student's customary environment; 2. In collaboration with the public school district and as determined by each individual IEP, purchasing, leasing, or otherwise providing for the acquisition of assistive technology devices by students with disabilities; 3. Selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing, or replacing assistive technology devices; 4. Coordinating and using other therapies, interventions, or services with assistive technology devices, such as those associated with existing education and rehabilitation plans and programs; 5. Training or technical assistance for a student with a disability or, if appropriate, that student's family; and 6. Training or technical assistance for professionals (including individuals providing education or rehabilitation services), employers, or other individuals who provide services to, employ, or are otherwise substantially involved in the major life functions of that student. <p>In developing each student's IEP, the IEP Team must consider whether the student needs assistive technology devices and services. Each public agency must ensure that</p>

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CRITERION NUMBER	CURRICULUM AND INSTRUCTION		
	Legal Standard		
	<p>assistive technology devices and services are made available to a student with a disability if required as a part of the student's special education, related services, and/or supplementary aids and services.</p> <ul style="list-style-type: none"> • If the team recommends an assistive technology evaluation, a multidisciplinary team of professionals knowledgeable about assistive technology devices should conduct the assessment with the student and family being included in the evaluation process. • In instances when assistive technology devices and/or services are determined as required, the Team must further determine and document which settings (classroom, home or other) in which the student needs access to those devices and services in order to assure provision of FAPE. <p>The IEP Team must also consider the communication needs of the student. Augmentative and alternative communication (AAC) is a form of assistive technology that can help students with disabilities that impede their ability to communicate to meet their education goals and participate fully alongside their nondisabled peers in all aspects of their education. AAC should be considered for those students who cannot communicate effectively through oral speech, including students with autism, cerebral palsy, intellectual disabilities, congenital disabilities, selective mutism, muscle disease, sensory impairments, and traumatic brain injury.</p> <table> <tr> <td>State Requirements 603 CMR 28.04(2); Technical Assistance Advisory SPED 2018-3 Addressing the Communication Needs of Students with Disabilities through Augmentative and Alternative Communication (AAC)</td><td>Federal Requirements 34 CFR 300.5; 300.6; 300.105; 300.324(a)(2)(v)</td></tr> </table>	State Requirements 603 CMR 28.04(2); Technical Assistance Advisory SPED 2018-3 Addressing the Communication Needs of Students with Disabilities through Augmentative and Alternative Communication (AAC)	Federal Requirements 34 CFR 300.5; 300.6; 300.105; 300.324(a)(2)(v)
State Requirements 603 CMR 28.04(2); Technical Assistance Advisory SPED 2018-3 Addressing the Communication Needs of Students with Disabilities through Augmentative and Alternative Communication (AAC)	Federal Requirements 34 CFR 300.5; 300.6; 300.105; 300.324(a)(2)(v)		

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CSE 40	<p>Instructional grouping requirements for students aged five and older</p> <ol style="list-style-type: none"> 1. The size and composition of instructional groupings for eligible students receiving services outside the general education classroom are compatible with the methods and goals stated in each student's IEP.

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CRITERION NUMBER	
	Legal Standard
	<p>2. Instructional grouping size requirements are maximum sizes and the collaborative exercises judgment in determining appropriate group size and supports for smaller instructional groups serving students with complex special needs.</p> <p>3. When eligible students are assigned to instructional groupings outside of the general education classroom for <u>60% or less of the students' school schedule</u>, group size does not exceed</p> <ul style="list-style-type: none"> • 8 students with a certified special educator, • 12 students if the certified special educator is assisted by 1 aide, and • 16 students if the certified special educator is assisted by 2 aides. <p>4. For eligible students served in settings that are substantially separate, serving solely students with disabilities for <u>more than 60% of the students' school schedule</u>, the collaborative provides instructional groupings that do not exceed</p> <ul style="list-style-type: none"> • 8 students to 1 certified special educator, or • 12 students to 1 certified special educator and 1 aide. <p>5. After the school year has begun, if instructional groups have reached maximum size as delineated in parts 3 and 4 of this criterion, the administrator of the program, collaborative director <u>and</u> the certified special educator(s) providing services in an instructional group may decide to increase the size of an instructional grouping by no more than 2 additional students if the additional students have compatible instructional needs and then can receive services in their neighborhood school.</p> <p>6. In such cases, the administrator provides written notification to the Department and the parents of all group members of the decision to increase the instructional group size and the reasons for such decision. Such increased instructional group sizes are in effect only for the year in which they are initiated.</p> <p>7. The collaborative takes all steps necessary to reduce the instructional groups to the sizes outlined in parts 3 or 4 of this criterion for subsequent years. Such steps are documented by the collaborative.</p> <p style="text-align: center;"> State Requirements Federal Requirements 603 CMR 28.06(6) </p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

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CRITERION NUMBER	
	Legal Standard
CSE 41	<p>Age span requirements The ages of the youngest and oldest student in any instructional grouping do not differ by more than 48 months. A written request for approval of a wider age range is submitted to the Commissioner of Elementary and Secondary Education in cases where the collaborative believes it is justified. Such requests are implemented only after approval of the Department of Elementary and Secondary Education.</p> <p>State Requirements 603 CMR 28.06(6)(f)</p> <p>Federal Requirements</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	STUDENT SUPPORT SERVICES
	Legal Standard
CSE 44	<p>Procedure for recording suspensions The collaborative has a procedure to record the number and duration of suspensions from any part of the student's program, including suspensions from special transportation prescribed by the IEP.</p> <p>State Requirements</p> <p>Federal Requirements 34 CFR 300.530; IDEA 2004 Final Regulations, Analysis of Comments and Changes, Federal Register 71 (14 August 2006): 46715</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard

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CRITERION NUMBER	
	Legal Standard
CSE 46 and elements of APD 9.6 – 10+ Day Suspensions (where applicable)	<p>Procedures for suspension of students with disabilities when suspensions exceed 10 consecutive school days or a pattern has developed for suspensions exceeding 10 cumulative days; responsibilities of the Team; responsibilities of the district</p> <ol style="list-style-type: none"> 1. A suspension of longer than 10 consecutive days or a series of suspensions that are shorter than 10 consecutive days but constitute a pattern are considered to represent a change in placement. 2. When a suspension constitutes a change in placement of a student with disabilities, the collaborative, district personnel, the parent, and other relevant members of the Team, as determined by the collaborative, parent and the district, convene within 10 days of the decision to suspend to review all relevant information in the student's file, including the IEP, any teacher observations, and any relevant information from the parents, to determine whether the behavior was caused by or had a direct and substantial relationship to the disability or was the direct result of the failure to implement the IEP—"a manifestation determination." 3. If collaborative, district personnel, the parent, and other relevant members of the Team determine that the behavior is <u>NOT</u> a manifestation of the disability, then the suspension or expulsion may go forward consistent with the collaborative policies and procedures and the student must be offered: <ol style="list-style-type: none"> a. services to enable the student, although in another setting, to continue to participate in the general education curriculum and to progress toward IEP goals; and b. as appropriate, a functional behavioral assessment and behavioral intervention services and modifications, to address the behavior so that it does not recur. 4. If collaborative and district personnel, the parent, and other relevant members of the Team determine that the behavior <u>IS</u> a manifestation of the disability, then the Team completes a functional behavioral assessment and behavioral intervention plan if it has not already done so. If a behavioral intervention plan is already in place, the Team reviews it and modifies it, as necessary, to address the behavior. Except when he or she has been placed in an interim alternative educational setting the student returns to the original placement unless the collaborative, parents and district agree otherwise or the hearing officer orders a new placement. <p>State Requirements Federal Requirements 34 CFR 300.530-537</p>

Department of Elementary and Secondary Education Comments: Findings:

There are no issues identified for this criterion.

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CRITERION NUMBER	FACULTY, STAFF AND ADMINISTRATION
	Legal Standard
CSE 51	<p>Appropriate special education teacher licensure Individuals who design and/or provide direct special education services described in IEPs are appropriately licensed.</p> <p>State Requirements M.G.L. c. 71, § 38G and § 89(qq); 603 CMR 1.07; 7.00; 28.02(3)</p> <p>Federal Requirements 34 CFR 300.156</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CSE 52	<p>Appropriate certifications/licenses or other credentials -- related service providers Any person, including non-educational personnel, who provides related services described under federal special education law, who supervises paraprofessionals in the provision of related services, or who provides support services directly to the general or special education classroom teacher is appropriately certified, licensed, board-registered or otherwise approved to provide such services by the relevant professional standards board or agency for the profession.</p> <p>State Requirements 603 CMR 28.02(3),(18)</p> <p>Federal Requirements 34 CFR 300.34; 300.156(b)</p>

Department of Elementary and Secondary Education Comments: Findings:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
	Registration of educational interpreters

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CRITERION NUMBER	
	Legal Standard
CSE 52A	<p>Providers of interpreting services for students who are deaf or hard of hearing must be registered with the Massachusetts Commission for the Deaf and Hard of Hearing.</p> <p>State Requirements 603 CMR 28.02(3),(18)</p> <p>Federal Requirements 34 CFR 300.34; 300.156(b)</p> <p>See the Memorandum on New Requirements for Registration of Sign Language Interpreters Who Work in Educational Settings at http://www.doe.mass.edu/news/news.aspx?id=3416.</p>

Department of Elementary and Secondary Education Comments: Findings:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CSE 53	<p>Use of paraprofessionals</p> <ol style="list-style-type: none"> Reserved. Persons employed as paraprofessionals and assistants do not design instruction for students with disabilities but are expected to implement instruction under the supervision of an appropriately certified or licensed professional who is proximate and readily available to provide such supervision. <p>State Requirements</p> <p>Federal Requirements 34 CFR 300.156</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CSE 54	Professional development

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CRITERION NUMBER	
	Legal Standard
	<p>1. The collaborative considers the needs of all staff in developing training opportunities for professional and paraprofessional staff and provides a variety of offerings.</p> <p>2. The collaborative ensures that all staff, including both special education and general education staff, are trained on:</p> <ul style="list-style-type: none"> a. state and federal special education requirements and related local special education policies and procedures; b. (if applicable, when collaborative students may be able to be placed in general education classrooms) analyzing and accommodating diverse learning styles of all students in order to achieve an objective of inclusion in the general education classroom of students with diverse learning styles; c. (if applicable, when collaborative students are placed in general education classroom(s)) methods of collaboration among teachers, paraprofessionals and teacher assistants to accommodate diverse learning styles of all students in the general education classroom; <p>3. If the collaborative provides transportation, then the collaborative provides in-service training for all locally hired <u>and</u> contracted transportation providers, before they begin transporting any special education student receiving special transportation, on his or her needs and appropriate methods of meeting those needs; for any such student it also provides written information on the nature of any needs or problems that may cause difficulties, along with information on appropriate emergency measures. Transportation providers include drivers of general and special education vehicles and any attendants or aides identified by a Team for either type of vehicle.</p> <p>State Requirements M.G.L. c. 71, §§ 38G, 38Q and 38Q ½; 603 CMR 28.03(1)(a); 28.06(8)(b) and (c)</p> <p>Federal Requirements</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	SCHOOL FACILITIES
	Legal Standard
CSE 55	<p>Special education facilities and classrooms</p> <p>The collaborative program is located in facilities and classrooms that:</p> <ol style="list-style-type: none"> 1. maximize the inclusion of such students into the life of the school;

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CRITERION NUMBER	SCHOOL FACILITIES
	Legal Standard
and APD 13.4 – Physical Facility / Architectural Barriers (where applicable)	<p>2. provide accessibility, free from barriers to mobility, to those areas of the buildings and grounds to which such access is necessary in order to implement fully each student's IEP;</p> <p>3. are at least equal in all physical respects to the average standards of general education facilities and classrooms in the buildings in which they are located;</p> <p>4. are given the same priority any as general education programs in the allocation of instructional and other space in the public school building in which they are located in order to minimize the separation or stigmatization of eligible students; and</p> <p>5. are not identified by signs or other means that stigmatize such students.</p> <p>Collaborative approved public day programs must meet the following requirements:</p> <ul style="list-style-type: none"> • If the program which enrolls students requiring wheelchairs shall have at least one entrance without steps and wide enough for a wheelchair, for each building utilized in carrying out the IEPs for such students. • If any part of the program is not accessible to students with limited physical mobility, a plan and timetable shall be provided that describes how the program will make all programs and appropriate buildings accessible. <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 45%;"> <p>State Requirements 603 CMR 28.03(1)(b) Mass. Const. Amend. Art. 114</p> </div> <div style="width: 45%;"> <p>Federal Requirements Section 504 of the Rehabilitation Act of 1973; Title II: 42 U.S.C. 12132; 28 C.F.R. 35.149, 35.150</p> </div> </div>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

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**CIVIL RIGHTS
METHODS OF ADMINISTRATION
AND
OTHER RELATED GENERAL EDUCATION
REQUIREMENTS**

**LEGAL STANDARDS,
COMPLIANCE RATINGS AND
COMMENTS**

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CRITERION NUMBER	CIVIL RIGHTS METHODS OF ADMINISTRATION (CR) AND OTHER RELATED GENERAL EDUCATION REQUIREMENTS PARENTAL INVOLVEMENT
	Legal Standard
CCR 7	<p>Information to be translated into languages other than English</p> <ol style="list-style-type: none"> 1. Important information and documents, e.g. handbooks and codes of conduct, being distributed to parents are translated into the major languages spoken by parents or guardians with limited English skills. The collaborative has established a system of oral interpretation to assist parents/guardians with limited English skills, including those who speak low-incidence languages. 2. Recruitment and promotional materials being disseminated to residents in the area served by the collaborative are translated into the major languages spoken by residents with limited English skills. 3. Information in notices, such as activities, responsibilities, and academic standards, provided to all students is provided to English Learners in a language and mode of communication that they understand. 4. Information provided to students about extracurricular activities and school events is provided to English Learners and to their parents/guardians in a language they understand. <p>Title VI; EEOA: 20 U.S.C. 1703(f); M.G.L. c. 76, § 5; 603 CMR 26.02(2); 603 CMR 26.03</p> <p>Implementation Guidance: In order to be able to fulfill the requirements of part 1, the collaborative must have (and use) a system for determining which parents/guardians have limited English skills and so need translations or interpreters.</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	CURRICULUM AND INSTRUCTION
	Legal Standard

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CRITERION NUMBER	CURRICULUM AND INSTRUCTION
	Legal Standard
CCR 7A Some elements are related to APD 6.1 – Daily Instructional Hours (if applicable)	<p>School year schedules</p> <ol style="list-style-type: none"> 1. Before the beginning of each school year, the collaborative sets a school year schedule for each program. The school year includes at least 185 school days for students in grades 1-12 at each elementary, middle, and secondary program in the collaborative, and these programs are in operation for at least 180 days a year for these students. 2. The collaborative ensures that unless his or her IEP or Section 504 Accommodation Plan provides otherwise, each elementary school student is scheduled for at least 900 hours of structured learning time a year and each secondary school student is scheduled for at least 990 hours of structured learning time a year, within the required school year schedule. Where the collaborative operates separate middle school programs, it designates each one as either elementary or secondary. 3. Where the collaborative sets a separate school year and school day schedule for kindergarten programs, it provides at least 425 hours of structured learning time a year. If the collaborative schedules two sessions of kindergarten a day, it ensures equal instructional time for all kindergarten students. <p>For approved public day programs: The program ensures that each student is scheduled to receive an average minimum of the following instructional hours, unless otherwise approved by ESE or the student's IEP or Section 504 Accommodation Plan provides otherwise:</p> <p>Elementary:</p> <ul style="list-style-type: none"> • 10 month program - 900 hours • 11 month program - 990 hours • 12 month program - 1080 hours <p>Secondary:</p> <ul style="list-style-type: none"> • 10 month program - 990 hours • 11 month program - 1089 hours • 12 month program - 1188 hours <p>M.G.L. c. 69, § 1G; 603 CMR 27.03, 27.04</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

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CRITERION NUMBER	
	Legal Standard
CCR 9	<p>Hiring and employment practices of prospective employers of students</p> <ol style="list-style-type: none"> 1. The collaborative requires each employer recruiting at the collaborative to sign a statement that the employer complies with applicable federal and state laws prohibiting discrimination in hiring or employment practices and the statement specifically includes the following protected categories: race, color, national origin, sex, gender identity, disability, religion, limited English speaking ability, sexual orientation and homelessness. 2. Prospective employers to whom this criterion applies include those participating in career days and work-study and apprenticeship training programs, as well as those offering cooperative work experiences. <p>M.G.L. c. 76, § 5; 603 CMR 26.07(5) as amended by Chapter 199 of the Acts of 2011</p> <p>Implementation Guidance: The statements signed by employers must indicate that the employer complies with all applicable federal and state laws prohibiting discrimination in hiring or employment practices on the bases of race, color, national origin, sex, gender identity, disability, religion, limited English speaking ability, sexual orientation and homelessness.</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	STUDENT SUPPORT SERVICES
	Legal Standard

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CRITERION NUMBER	STUDENT SUPPORT SERVICES
	Legal Standard
CCR 10	<p>Anti-Hazing Reports</p> <ol style="list-style-type: none"> 1. The principal/program director of each secondary school program in the collaborative issues a copy of M.G.L. c. 269 §§ 17 through 19 to every student enrolled full-time and every student group, student team, or student organization, including every unaffiliated student group, student team, or student organization, and a copy of the collaborative's anti-hazing disciplinary policy approved by the collaborative board. 2. Each secondary school program files, at least annually, a report with the Department certifying: <ol style="list-style-type: none"> a) Its compliance with its responsibility to inform student groups, teams, or organizations, and every full-time enrolled student, of the provisions of M.G.L. c. 269 §§ 17 through 19; b) Its adoption of a disciplinary policy with regard to the organizers and participants of hazing; and c) That the hazing policy has been included in the student handbook or other means of communicating school policies to students. <p>M.G.L. c. 269 §§ 17 through 19</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	STUDENT SUPPORT SERVICES
	Legal Standard
CCR 10A	<p>Student handbooks and codes of conduct</p> <ol style="list-style-type: none"> 1. <ol style="list-style-type: none"> a) The collaborative has a code of conduct for students and one for teachers. b) The principal/program director of every collaborative program containing grades 9-12 prepares, in consultation with the collaborative board, a student handbook containing the student code of conduct and distributes it to each student annually, as well as to parents and school personnel. The collaborative board reviews and revises the student code of conduct every year. c) The principal/program director of every collaborative program containing other grades distributes the student code of conduct to students, parents, and personnel annually. d) At the request of a parent or student whose primary language is not English, a student handbook or student code of conduct is translated into that language.

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CRITERION NUMBER	STUDENT SUPPORT SERVICES
	Legal Standard
	<p>2. Student codes of conduct contain:</p> <ul style="list-style-type: none"> a) procedures assuring due process in disciplinary proceedings; and b) appropriate procedures for the discipline of students with special needs and students with Section 504 Accommodation Plans. <p>3. Student handbooks and codes of conduct reference M.G.L. c. 76, § 5 and contain:</p> <ul style="list-style-type: none"> d) nondiscrimination policy that is consistent with M.G.L. c. 76, § 5, and affirms the school's non-tolerance for harassment based on race, color, national origin, sex, gender identity, disability, religion, limited English speaking ability, sexual orientation and homelessness, or discrimination on those same bases; e) the procedure for accepting, investigating and resolving complaints alleging discrimination or harassment; and f) the disciplinary measures that the school may impose if it determines that harassment or discrimination has occurred. <p>Section 504 of the Rehabilitation Act of 1973; M.G.L. c. 71, § 37H, 37H1/2 and 37H 3/4; 603 CMR 53.00; 603 CMR 26.08, as amended by Chapter 199 of the Acts of 2011</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 10B	<p>Bullying Intervention and Prevention</p> <p>1. The collaborative must amend collaborative and program handbooks to conform to its updated amended Bullying Prevention and Intervention Plan (Plan). The collaborative handbook (and local updated Plan) must be consistent with the amendments to the Massachusetts anti-bullying law, which became effective July 1, 2013. The amendments extend protections to students who are bullied by a member of the collaborative/school staff. As defined by M.G.L. c. 71, § 37O, as amended, a member of the collaborative/school staff includes, but is not limited to, an “educator, administrator, school nurse, cafeteria worker, custodian, bus driver, athletic coach, advisor to an extracurricular activity or paraprofessional.” The collaborative handbook must make clear that a member of the staff may be named the “aggressor” or</p>

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	Legal Standard
	<p>“perpetrator” in a bullying report.</p> <ol style="list-style-type: none"> 2. Collaborative and program employee handbooks must contain relevant sections of the amended local Plan relating to the duties of faculty and staff and relevant sections of the local Plan addressing the bullying of a student by a staff member. 3. Each year the collaborative and collaborative programs must give parents and guardians annual written notice of the student-related sections of the local Plan. 4. Each year the collaborative and collaborative programs must provide all staff with annual written notice of the local Plan. 5. The collaborative and collaborative programs must implement professional development for all staff that includes developmentally appropriate strategies to prevent bullying incidents; developmentally appropriate strategies for immediate, effective interventions to stop bullying incidents; information regarding the complex interaction and power differential that can take place between and among a perpetrator, victim and witnesses to the bullying; research findings on bullying, including information about specific categories of students who have been shown to be particularly at risk for bullying in the school environment; information on the incidence and nature of cyber-bullying; and internet safety issues as they relate to cyber-bullying. <p>M.G.L. c. 71, § 37H, as amended by Chapter 92 of the Acts of 2010 and as amended by sections 72-74 of Chapter 38 of the Acts of 2013. M.G.L. c. 71, § 37O</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 10C	<p>Student Discipline</p> <p>The collaborative executive director and board of directors shall ensure that policies and procedures are in place in public preschool, elementary, and secondary programs under its jurisdiction that meet, at a minimum, the requirements of M.G.L. c. 71, § 37H3/4, M.G.L. c. 76, § 21, and 603 CMR 53.00. These policies and procedures must address or establish, but are not limited to:</p> <ol style="list-style-type: none"> 1. The notice of suspension and hearing; 2. Procedures for emergency removal;

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	Legal Standard
	3. Procedures for principal hearings for both short and long term suspension; 4. Procedures for in-school suspension; 5. Procedures for executive director hearing; 6. Procedures for education services and academic progress (School-wide Education Service Plan); 7. A system for periodic review of discipline data by special populations; 8. Alternatives to suspension. M.G.L. c. 71, § 37H3/4, M.G.L. c. 76, § 21, and 603 CMR 53.00

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 11A	Designation of coordinator(s); grievance procedures <ol style="list-style-type: none"> 1. The collaborative has designated one or more staff persons to serve as coordinator(s) for compliance with its responsibilities under Title IX, Section 504, and (if it employs 50 or more persons) Title II. 2. The collaborative has adopted and published grievance procedures for students and for employees providing for prompt and equitable resolution of complaints alleging discrimination based on sex or disability. Title IX: 20 U.S.C. 1681; 34 CFR 106.8; Section 504: 29 U.S.C. 794; 34 CFR 104.7; Title II: 42 U.S.C. 12132; 28 CFR 35.107

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 12A	Annual and continuous notification concerning nondiscrimination and

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CRITERION NUMBER	
	Legal Standard
	<p>coordinators</p> <ol style="list-style-type: none"> 1. If the collaborative offers vocational education programs, it advises students, parents, employees and the general public before the beginning of each school year that all vocational opportunities will be offered regardless of race, color, national origin, sex, gender identity, disability, religion, limited English speaking ability, sexual orientation or homelessness. The notice includes a brief summary of program offerings and admission criteria and the name(s), office address(es), and phone number(s) of the person(s) designated under CR 11A to coordinate compliance under Title IX and Section 504. 2. In all cases, the collaborative takes continuing steps to notify applicants, students, parents, and employees (including those with impaired vision or hearing), as well as unions or professional organizations holding collective bargaining or professional agreements with the collaborative, that it does not discriminate on the basis of race, color, national origin, sex, gender identity, disability, religion, limited English speaking ability, sexual orientation or homelessness. This notice, also, includes the name(s), office address(es), and phone number(s) of the person(s) designated under CR 11A to coordinate compliance under Title IX and Section 504. 3. Written materials and other media used to publicize a school include a notice that the collaborative and its programs does not discriminate on the basis of race, color, national origin, sex, gender identity, disability, religion, limited English speaking ability, sexual orientation or homelessness. <p>Title VI: 42 U.S.C. 2000d; 34 CFR 100.6(d); Title IX: 20 U.S.C. 1681; 34 CFR 106.8(a), 106.9; Section 504: 29 U.S.C. 794; 34 CFR 104.8; M.G.L. c. 76, § 5; 603 CMR 26.02(2) as amended by Chapter 199 of the Acts of 2011</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 14	<p>Counseling and counseling materials free from bias and stereotypes To ensure that counseling and counseling materials are free from bias and stereotypes on the basis of race, color, sex, gender identity, religion, national origin, sexual orientation, disability, and homelessness, all counselors:</p> <ol style="list-style-type: none"> 1. encourage students to consider programs of study, courses, extracurricular

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	Legal Standard
	<p>activities, and occupational opportunities on the basis of individual interests, abilities, and skills;</p> <ol style="list-style-type: none"> 2. examine testing materials for bias and counteract any found bias when administering tests and interpreting test results; 3. communicate effectively with ELs and disabled students and facilitate their access to all programs and services offered by the district; 4. ensure that ELs have the opportunity to receive guidance and counseling in a language they understand; and 5. support students in educational and occupational pursuits that are nontraditional for their gender. <p>Title VI: 42 U.S.C. 2000d; 34 CFR 100.3(a), (b); EEOA: 20 U.S.C. 1703(f); Title IX: 20 U.S.C. 1681; 34 CFR 106.31, 106.36; Section 504: 29 U.S.C. 794; 34 CFR 104.4, 104.37; Title II: 42 U.S.C. 12132; 28 CFR 35.130, 35.160; NCLB: Title III, Part A, Sec. 3121(c)(1)(C); Title X, Part C, Sec. 721; Mass. Const. amend. art. 114; M.G.L. c. 71A, § 7; c. 76, § 5 and 603 CMR 26.03, 26.04 and 26.07(8), as amended by Chapter 199 of the Acts of 2011</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 17A and APD 9.4 Physical Restraint	<p>Physical Restraint</p> <p>The program shall have a written policy on the use of physical restraint and administer physical restraint in accordance with the requirements of 603 CMR 46.00.</p> <p>The program administers physical restraint only in emergency situations of last resort when needed to protect a student and/or member of the school community from assault or imminent, serious, physical harm and with extreme caution in order to prevent or minimize any harm to the student as a result of the use of physical restraint.</p> <p>Physical restraint policy and procedures must include the following:</p> <ol style="list-style-type: none"> 1. Methods for engaging parents and students in discussions about restraint prevention and use; 2. A description and explanation of the method of physical restraint used by the

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CRITERION NUMBER	
	Legal Standard
	<p>program in an emergency situation;</p> <ol style="list-style-type: none"> 3. A statement prohibiting seclusion, medication restraint, mechanical restraint and prone restraint unless permitted under 603 CMR 46.03(1)(b); 4. Physical restraint shall be used only in emergency situations of last resort, after other lawful and less intrusive alternatives have failed or been deemed inappropriate; 5. A description of the program's procedure for conducting periodic review of data and documentation on the program's use of restraint; 6. A description of the program's training requirements for all staff; 7. A description of the intensive training for staff who serve as restraint resources for the program; 8. Reporting requirements and follow-up procedures for reports to parents/guardians and to the Department; 9. A procedure for receiving and investigating complaints regarding restraint practices; and 10. The director or his/her designee shall maintain an on-going record of all instances of physical restraint, which shall be made available for review by the Department upon request. <p>NOTE: In order for the principal to be able to complete the weekly Individual Student Reviews and monthly Administrative Reviews required by the regulations, at 603 CMR 46.06(5) and (6), the principal's log would need to contain the following fields, at a minimum:</p> <ul style="list-style-type: none"> • Student name, • Dates of restraint, • Time of restraint, • Duration of restraint, • Individuals involved in the restraint, and • Whether or not anyone (student or staff) was injured. <p>NOTE: A residential educational program must comply with ESE restraint requirements under 603 CMR 46.00 during school hours and EEC restraint requirements under 102 CMR 3.00 during residential hours.</p> <p>NOTE: A program within a program or facility subject to M.G.L. c. 123 or Department of Mental Health Regulations must comply with the restraint requirements of M.G.L. c. 123, 104 CMR 27.12 or 104 CMR 28.05, where applicable.</p> <p>NOTE: Physical restraint training must be provided to all program staff within the first month of the school year regarding restraint prevention and the requirements when restraint is used.</p> <p>OR</p>

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CRITERION NUMBER	
	Legal Standard
	For employees hired after the school year begins, physical restraint training must be provided and completed within one month of the date of hire of the employee. M.G.L. c. 71, § 37G and 603 CMR 46.00

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 18A	Collaborative employment practices Collaborative employment practices in general are free from discrimination on the basis of race, color, national origin, sex, or disability. The collaborative's employee recruitment is aimed at reaching all groups, including members of linguistic, ethnic, and racial minorities, females and males, and persons with disabilities. Title VI: 42 U.S.C. 2000d; 34 CFR 100.3(c); EEOA: 20 U.S.C. 1703(d); Title IX: 20 U.S.C. 1681; 34 CFR 106.51-106.61; Section 504: 29 U.S.C. 794; 34 CFR 104.11-104.14; Title II: 42 U.S.C. 12132; 28 CFR 35.140; Mass. Const. amend. art 114

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 20 and CCR 26A- Confidentiality and Student Records; and	Staff training on confidentiality of student records The collaborative trains school personnel on the provisions of the Family Educational Rights and Privacy Act, M.G.L. c. 71, § 34H, and 603 CMR 23.00, and on the importance of information privacy and confidentiality. In accordance with federal and state requirements, the collaborative protects the

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CRITERION NUMBER	
	Legal Standard
APD 18.1-Confidentiality of Student Records (where applicable)	<p>confidentiality of any personally identifiable information that it collects, uses or maintains.</p> <p>The collaborative maintains and provides access to student records in accordance with federal and state requirements.</p> <p>A log of access shall be kept as part of each student's record. If parts of the student record are separately located, a separate log shall be kept with each part. The log shall indicate all persons who have obtained access to the student record, stating:</p> <ul style="list-style-type: none"> • The name, position and signature of the person releasing the information; • The name, position and, if a third party; • The affiliation if any, of the person who is to receive the information; • The date of access; • The parts of the record to which access was obtained; and • The purpose of such access. <p>NOTE: Unless student record information is to be deleted or released, this log requirement shall not apply to authorized personnel who inspect the student record, administrative office staff and clerical personnel who add information to or obtain access to the student record and the school nurses who inspect the student health record.</p> <p>FERPA: 20 U.S.C. § 1232g; 34 CFR Part 99, M.G.L. c. 71, § 34H; 603 CMR 23.05, 23.07; 603 CMR 28.09(5)(a) and 28.09(10); 603 CMR 23.07(1); M.G.L. c. 71, § 34H</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 21	<p>Staff training regarding civil rights responsibilities</p> <p>The collaborative provides in-service training for all school personnel at least annually regarding civil rights responsibilities, including the prevention of discrimination and harassment on the basis of students' race, color, sex, religion, national origin and sexual orientation and the appropriate methods for responding to it in the school setting.</p>

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CRITERION NUMBER	
	Legal Standard
	Title VI: 42 U.S.C. 2000d; 34 CFR 100.3; EEOA: 20 U.S.C. 1703(f); Title IX: 20 U.S.C. 1681; 34 CFR 106.31-106.42; M.G.L. c. 76, § 5; 603 CMR 26.07(2) and (3)

Department of Elementary and Secondary Education Comments: Findings:

There are no issues identified for this criterion.

CRITERION NUMBER	
	Legal Standard
CCR 24	<p>Curriculum review</p> <p>The collaborative ensures that individual teachers in the collaborative review all educational materials for simplistic and demeaning generalizations, lacking intellectual merit, on the basis of race, color, sex, gender identity, religion, national origin or sexual orientation. Appropriate activities, discussions and/or supplementary materials are used to provide balance and context for any such stereotypes depicted in such materials.</p> <p>M.G.L. c. 76, § 5 and 603 CMR 26.05(2), as amended by Chapter 199 of the Acts of 2011</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

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**APPROVED PUBLIC DAY PROGRAM
LEGAL STANDARDS,
COMPLIANCE RATINGS AND
COMMENTS**

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Massachusetts Department of Elementary and Secondary Education
Office of Approved Special Education Schools
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AREA 4: DISCLOSURE OF INFORMATION

CRITERION NUMBER	
	REQUIREMENTS
APD 4.2 Public Information and Postings	<p>The following information must be publicly posted:</p> <ol style="list-style-type: none"> 1. First aid procedures; 2. Emergency procedures; and 3. Emergency telephone numbers. <p>603 CMR 28.09(6)(a-e) and 28.09(2)(b)(4)</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

CRITERION NUMBER	
	REQUIREMENTS
APD 4.5 Immediate Notification	<p>Pursuant to applicable regulations and agency policy this school is hereby providing immediate electronic notification to ESE for ANY student enrolled in its program (Massachusetts Student, Out-of-State Student or Privately Funded Student) concerning incidents that occur during SCHOOL HOURS ONLY, except for EMERGENCY TERMINATIONS, which is for both school and residential hours.</p> <ol style="list-style-type: none"> 1. The death of any student (Immediate verbal and written notification to the student's parents/guardians and school district); 2. The filing of a 51-A report with Department of Children and Families (DCF) OR a complaint filed with the Disabled Persons Protection Commission (DPPC), against the school or a school staff member, for alleged abuse or neglect of any student; 3. Any action taken by a federal, state, or local agency that might jeopardize the school's approval with ESE (i.e. federal or state investigation; closure of intake); 4. Any legal proceeding brought against the school or its employee(s) arising out of circumstances related to the care or education of any of its students; 5. The hospitalization of a student (including out-patient emergency room or urgent care visits) due to physical injury at school or previously unidentified illness, accident or disorder which occurs while the student is in the

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CRITERION NUMBER	
	REQUIREMENTS
	<p>program;</p> <ol style="list-style-type: none"> 6. A student run from the program; and 7. Any other incident of a serious nature that occurs to a student or staff in the program. (Some examples include: any police involvement, any media involvement, weapons, fire setting, alcohol or drug possession or use while in the program). <p><u>FOR BOTH SCHOOL AND RESIDENTIAL HOURS:</u></p> <ol style="list-style-type: none"> 8. he emergency termination of a student pursuant to 28.09(12)(b). <p>603 CMR 18.03(10); 603 CMR 18.05(7); 603 CMR 28.09(12) (a, b)</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

**AREA 9: EDUCATIONAL PROGRAM REQUIREMENTS- STUDENT DISCIPLINE AND
BEHAVIOR SUPPORT**

CRITERION NUMBER	
	REQUIREMENTS
APD 9.1(a) Student Separation Resulting from Behavior Support	<p>If the program's behavior support policy and procedures result in a student being separated in a room apart from the group or program activities, it shall include, but not be limited to, the following:</p> <ol style="list-style-type: none"> 1. Guidelines for staff in the utilization of such an area; 2. Persons responsible for implementing such procedures; 3. The duration of the procedures including procedures for approval by the chief administrative person or his/her designee for any period longer than 30 minutes; 4. Requirement that students shall be observed at all times and in all parts of the room, and that the staff shall be accessible at all times; and 5. A means of documenting the use of time-out for an individual student, including, at a minimum, length of time, reasons for this intervention, who approved the procedure, and who monitored the student during the time out. <ol style="list-style-type: none"> a) Time out rooms shall not be locked. b) Any room or space used for the practice of separation must be physically safe and appropriate to the population served by the facility. <p>603 CMR 18.05(5)(i), 18.05(6, 7), and 603 CMR 46.02(5)(b)</p>

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CRITERION NUMBER	
	REQUIREMENTS

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

AREA 12: EDUCATIONAL STAFFING REQUIREMENTS – STAFF TRAINING

CRITERION NUMBER	
	REQUIREMENTS
APD 12.2 In-Service Training Plan and Calendar and elements of APD 12.2(a) – Required Training – Behavior Support and Restraint; and 12.2(d) – Required Training – Medical Training	<p>All staff, including new employees, interns and volunteers, must participate in annual in-service training on average at least two hours per month.</p> <p>The following topics are <u>required</u> in-service training topics and <u>must</u> be provided annually to <u>all staff</u>:</p> <ol style="list-style-type: none"> Reporting abuse and neglect of students to the Department of Children and Families and/or the Disabled Persons Protection Commission; Disciplinary and Behavior Support Procedures used by the program, such as positive reinforcement, point/level systems, token economies, time-out procedures and techniques for dealing with disruptive or violent behavior, the program's student conduct/discipline code, suspensions and terminations; as well as detailed Restraint Procedures including de-escalation methods used by the program, safeguards for the students' emotional, physical, and psychological well-being; procedures for obtaining and recording data regarding student discipline and behavior and integrating it into IEP Team discussions; Runaway policy; Emergency procedures including Evacuation Drills and Emergency Drills; and Civil rights responsibilities (discrimination and harassment). <p>The following <u>additional</u> topics are <u>required</u> in-service training topics and <u>must</u> be provided annually to <u>all teaching staff</u>:</p> <ul style="list-style-type: none"> How the learning standards of the Massachusetts Curriculum Frameworks are incorporated into the program's instruction; Procedures for inclusion of all students in MCAS testing and/or alternate assessments; and Student record policies and confidentiality issues. <p>The following <u>additional</u> topics are <u>required</u> in-service training topics and <u>must</u> be provided annually to <u>appropriate staff based on their job responsibilities</u>:</p> <ul style="list-style-type: none"> CPR training and certification;

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CRITERION NUMBER	
	REQUIREMENTS
	<ul style="list-style-type: none"> Medication administration (including, but not limited to, administration of antipsychotic medications and discussions of medications students are currently taking and their possible side effects; training shall include the nature of a medication, potential side effects and any special precautions or requirements shall be provided by a physician or registered nurse to all staff providing care or instruction to students for whom any staff administers medication); Transportation safety (for staff with transportation-related job responsibilities); and Student record policies and confidentiality issues (for staff who oversee, maintain or access student records). <p>6603 CMR 28.09(7)(f), 28.09(9)(b) and 28.09(10); 603 CMR 18.03(3), 18.05(9)(e)(1), 18.05(9)(f)(3)(c), 18.05(10) and 18.05(11)(h); Title VI: 42 U.S.C. 2000d; 34 CFR 100.3; EEOA: 20 U.S.C. 1703(f); Title IX: 20 U.S.C. 1681; 34 CFR 106.31-106.42; M.G.L. c. 76, § 5 and 603 CMR 26.07(2) and (3).</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

AREA 15: PARENT AND STUDENT INVOLEMENT

CRITERION NUMBER	
	REQUIREMENTS
ADD 15.5 Parent Consent and Required Notification	<p>The program shall develop and implement policy and procedures to work with school districts to obtain the following consents:</p> <ol style="list-style-type: none"> <u>Annual:</u> <ul style="list-style-type: none"> Emergency medical treatment Medication Administration (when applicable) <u>When applicable:</u> <ul style="list-style-type: none"> Research Experimentation Fundraising Publicity and Observation

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	REQUIREMENTS
	<p>3. The program's policy and procedures shall include, when applicable, notification pursuant to Parental Notification Law M.G.L. c. 71, § 32A concerning curriculum that primarily involves human sexual education or human sexuality issues.</p> <p>603 CMR 18.05(5)(c), 18.05(8), 18.05(9)(f)(1) and 18.05 (9)(j); M.G.L. c. 71, § 32A</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

AREA 16: HEALTH AND MEDICAL SERVICES

CRITERION NUMBER	
	REQUIREMENTS
APD 16.3 Nursing	<p>The program shall have a registered school nurse available depending upon the health care needs of the program's population.</p> <p>NOTE: School Nurse means a nurse practicing in a school setting, who is:</p> <ol style="list-style-type: none"> 1) a graduate of an approved school for professional nursing; 2) currently licensed as a Registered Nurse pursuant to M.G.L c. 112; and 3) appointed by a school committee, collaborative board, or a board of health in accordance with M.G.L. c. 71, §§ 53, 53A, and 53B. <p>603 CMR 18.05(9)(b); M.G.L c. 112; M.G.L. c. 71, §§ 53, 53A, and 53B</p>

Department of Elementary and Secondary Education Comments:

There are no issues identified for this criterion.

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Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: November 18, 2021
Re: ELE Coordinated Program Review

Valley is pleased to inform the Board of Directors that Valley has received 100% on our Tiered Focused Monitoring Review conducted by the Department's Office of Language Acquisition (OLA). The purpose of the Tiered Focused Monitoring Review is to monitor compliance with regulatory requirements focusing on English Learner Education.

"The district will not be receiving a report that includes ratings and findings, as the team found the district to be in compliance with all criteria reviewed."

We have since been informed that Sibel Hughes, Assistant Director, Office of Language Acquisition at the Massachusetts Department of Elementary and Secondary Education, is now using Valley's ELE Guidelines as an exemplar and it was recently shared with the Statewide MOEC Special Education Director Job Alike group.

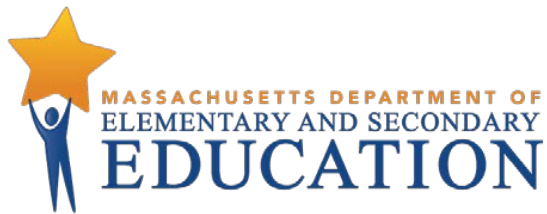
Congratulations to the Valley Team for all their hard work on this matter.

Required Action:

None

Attachments:

Tiered Focused Monitoring Report
Valley Collaborative ELE Guidelines



Valley Collaborative

Tiered Focused Monitoring Report

Onsite Dates: October 25-28, 2021

Date of Final Report: 10/25/2021



Jeffrey C. Riley
Commissioner of Elementary and Secondary Education

During the 2021-2022 school year, Valley Collaborative participated in a Tiered Focused Monitoring Review conducted by the Department's Office of Language Acquisition (OLA). The purpose of the Tiered Focused Monitoring Review is to monitor compliance with regulatory requirements focusing on English Learner Education.

District/charter schools are reviewed every six years through Tiered Focused Monitoring. There are 12 ELE criteria that target implementation of the requirements related to ELE programs under state and federal law and regulations:

- ELE 1: Annual English Language Proficiency Assessment
- ELE 2: State Accountability Assessment
- ELE 3: Initial Identification of ELs and FELs
- ELE 5: ELE Program and Services
- ELE 6: Program Exit and Readiness
- ELE 7: Parent Involvement
- ELE 8: Declining Entry to a Program
- ELE 10: Parental Notification
- ELE 13: Follow-up Support
- ELE 14: Licensure Requirements
- ELE 15: Professional Development Requirements
- ELE 18: Records of ELs

Tiered Focused Monitoring allows for differentiated monitoring based on a district's level of need, the Tiers are defined as follows:

Districts in Tiers 1 and 2 have been determined to have no or low risk:

- Tier 1/Self-Directed Improvement: Data points indicate no concern on compliance and performance outcomes – meets requirements.
- Tier 2/Directed Self-Improvement: No demonstrated risk in areas with close link to student outcomes – low risk.

Districts in Tiers 3 and 4 have demonstrated greater risk:

- Tier 3/Corrective Action: Areas of concern include both compliance and student outcomes – moderate risk.
- Tier 4/Cross-unit Support and Corrective Action: Areas of concern have profound effect on student outcomes and ongoing compliance – high risk.

The monitoring process differs depending on the tier assigned to the district as well as the district's previous tier assignment.

The review process includes the following:

1- Self-Assessment

- District reviews English Learner Education documentation for required elements including document uploads.
- District reviews a sample of English learner (EL) student records selected across grade levels and EL focus areas such as opt-out students, former ELs and students and/or parents who need translation and/or interpretation.
- Upon completion of these two internal reviews, the district's self-assessment is submitted to the Department for review.

Template Version 102021

2- Verification

- Review of EL student records: The Department may select a sample of student records and request certain documentation to be uploaded to the WBMS as evidence of implementation of the ELE criteria.
- Review of additional documents for English Learner Education
- Surveys of parents of ELs: Parents of ELs are sent a survey that solicits information regarding their experiences with the district's implementation of English Learner Education program(s), related services, and procedural requirements.
- Interviews of staff

Report: For Tier 1 & 2 Tiered Focused Monitoring Reviews

Within approximately 20 business days of the onsite visit, the onsite chairperson will forward to the superintendent or charter school leader the findings from the Tiered Focused Monitoring Review. Within 10 business days of receipt of the findings, the district reviews and comments on the findings for factual accuracy before they are finalized. After the report is finalized, all districts in Tiers 1 and 2, as part of the reporting process, will develop a Continuous Improvement and Monitoring Plan (CIMP) for any criteria receiving a rating of "Partially Implemented," "Not Implemented," and "Implementation in Progress." The CIMP outlines an action plan, identifies the success metric, describes the measurement mechanism and provides a completion timeframe to bring those areas into compliance with the controlling statute or regulation. District and charter schools are expected to incorporate the CIMP actions into their district and school improvement plans, including their professional development plans.

DEFINITION OF COMPLIANCE RATINGS

Implemented	The requirement is substantially met in all important aspects.
Implementation in Progress	This rating is used for criteria containing new or updated legal requirements and means that the district has implemented any old requirements contained in the criterion and is training staff or beginning to implement the new requirements in such a way that the onsite team anticipates that the new requirements will be implemented by the end of the school year.
Partially Implemented	The requirement, in one or several important aspects, is not entirely met.
Not Implemented	The requirement is totally or substantially not met.
Not Applicable	The requirement does not apply to the school district or charter school.

For more information on the Tiered Focused Monitoring approach, please visit the Department's [website](#).

Valley Collaborative

SUMMARY OF COMPLIANCE CRITERIA RATINGS

	English Learner Education Requirements
IMPLEMENTED	ELE 5, ELE 8, ELE 13, ELE 14

The district conducted a self-assessment and the Department reviewed all of the criteria in the specific program areas. The Tiered Focused Monitoring Report typically includes those criteria that were found by the team to be "Partially Implemented," "Not Implemented," or "Implementation in Progress." (Refer to the "Definition of Compliance Ratings" section of the report.) Tiered Focused Monitoring Reports do not include criteria receiving a rating of "Implemented" or "Not Applicable." Therefore, the district will not be receiving a report that includes ratings and findings, as the team found the district to be in compliance with all criteria reviewed.

VALLEY COLLABORATIVE



English Language Education Guidelines

Updated and Approved by the Board of Directors of Valley Collaborative on September 16, 2021

This 2021 Valley Collaborative Guidance Document was framed and built upon the generously shared work of North River Collaborative as well as two pertinent guiding documents provided by the Massachusetts Department of Education entitled; *Guidance on Identification, Assessment, Placement and Reclassification of English Language Learners* (MDESE, January 2019) and *Guidance for Supporting English Learners with Disabilities* (MDESE February 2019), Additional supporting data and documentation was found within the ELE Compliance for Collaboratives (MOEC presentation October 2017). Valley Collaborative would like to thank Clarice M Doliber and Stephen Donovan for graciously sharing North River Collaborative's guidelines and providing permission for Valley to adopt in part and in full.

Statement of Non-Discrimination

Valley Collaborative is committed to maintaining a work and learning environment free from discrimination on the basis of race, color, religion, national origin, pregnancy, sex, gender identity, sexual orientation, marital/civil union status, ancestry, place of birth, age, citizenship status, veteran status, political affiliation, genetic information, disability, limited English speaking ability, or homelessness, as defined by state and federal laws. Additionally, we prohibit retaliation against individuals who oppose such discrimination and harassment or who participate in an equal opportunity investigation.

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INTRODUCTION AND BACKGROUND

As a special education collaborative, Valley delivers instruction based on each student's individual and unique needs. In addition to the students' special education needs, Valley Collaborative is committed to providing English language learners (ELLs) or English learners (ELs) with the opportunity to become proficient in English and provide them with full access to the curriculum. Some students do not have a strong base of literacy or fluency in their first language and need to develop essential skills in listening, speaking, reading, and writing in English. As an educational collaborative with a low number of enrolled ELs, in order to accomplish these goals, English learners will receive sheltered English instruction (SEI) in classrooms in accordance with state and federal laws. Valley Collaborative students designated as EL will be educated in a culturally and linguistically responsive teaching program consistent with their level of English language proficiency, academic and special education needs.

Federal and state law requires proper identification and annual language proficiency assessment of students whose first language is not English or who struggle to complete ordinary classroom work in English (G.L. c. 71A; Title III of the *No Child Left Behind Act* - *NCLB*). The law and its successor, the *Every Student Succeeds Act of 2016* (ESSA), also requires that students identified as ELs (also referred to as "students with limited English proficiency," or "LEP students" in federal laws and guidance, and "English learner" in state law) are provided with opportunities to receive instruction that is appropriate for their individual language proficiency level, allows them to develop English language proficiency, and affords them equal access to rigorous content area instruction and academic achievement alongside their native English speaking peers. In Massachusetts this means that, with limited exceptions, sending districts and collaboratives are required to provide ELs SEI instruction until they are proficient in English. SEI consists of both sheltered content area instruction and English as a Second Language (ESL) instruction. Once proficient in English, ELs are to be exited from language programs (G.L. c. 71A § 4) and monitored for a period of four years.

In 2012, the Massachusetts Board of Elementary and Secondary Education adopted new regulations and launched an initiative to improve the academic achievement of ELs and close the persistent proficiency gaps between ELs and their English proficient peers. Three major components of the Rethinking Equity and Teaching for English Language Learners (<http://www.doe.mass.edu/retell/>) initiative were designed, in tandem, to strengthen teaching and learning for ELs: 1) required professional development about sheltering content instruction and promoting language development for ELs (the SEI Endorsement and related courses for teachers and administrators), 2) a new set of English language development standards (the World-class Instructional Design and Assessment English Language Development standards – or WIDA ELD standards, and 3) an annual language proficiency assessment, Assessing Comprehension and Communication in English State to State for ELs (ACCESS for ELs).

This document will provide an overview of the program and regulations for Valley Collaborative.

WIDA Overview

In 2012, Massachusetts joined the WIDA (World Class Instructional Design and Assessment) consortium including over 32 states in the US to guide EL programs. Originally, this research effort that began in 2004 was a collaboration of Wisconsin, Illinois, Delaware and Arkansas (thus the acronym) but later purchased by corporate America to evolve into WIDA. The EL assessment is known as ACCESS 2.0.

WIDA Highlights:

- WIDA has a ‘Can Do’ philosophy with significant research background that believes that: “Every teacher is a teacher of language.” WIDA is content based and aligned with the Common Core standards.
- The four pillars of WIDA foundation are research-based language development principles, constructive academic language, theoretical foundations, and WIDA’s ‘Can Do’ philosophy.
- Academic language is the bridge. Content language is emphasized.
- Each grade will have a matrix for standards.
- The Model Performance Indicators (MPI) are the blueprint for instruction transformation.
- The Matrix will include knowledge associated with grade level and skills associated with that knowledge corresponding to Common Core Standards.
- The strands of the MPI will provide scaffolding for instruction (e.g. identifying, distinguishing, analyzing and drawing conclusions).
- Student-based assessments (ACCESS) will target language proficiency and academic language proficiency together.
- WIDA-ACCESS (ELL testing) is 15% listening, 35% reading, 35% writing, and 15% speaking.
- ACCESS will provide raw scores, scaled scores, proficiency scores, reports for parents/guardians and teachers, student roster, school frequency, and sending district frequency.

Overview Chart of the WIDA Proficiency Levels

	Level 1 Entering	Level 2 Beginning	Level 3 Developing	Level 4 Expanding	Level 5 Bridging	Level 6 Reading
LISTENING	<ul style="list-style-type: none"> Point to stated pictures, words, phrases Follow one-step oral directions Match oral statements to objects, figures or illustrations 	<ul style="list-style-type: none"> Sort pictures, objects according to oral instructions Follow two-step oral directions Match information from oral descriptions to objects, illustrations 	<ul style="list-style-type: none"> Locate, select, order information from oral descriptions Follow multi-step oral directions Categorize or sequence oral information using pictures, objects 	<ul style="list-style-type: none"> Compare/contrast functions, relationships from oral information Analyze and apply oral information Identify cause and effect from oral discourse 	<ul style="list-style-type: none"> Draw conclusions from oral information Construct models based on oral discourse Make connections from oral discourse 	
SPEAKING	<ul style="list-style-type: none"> Name objects, people, pictures Answer WH- (who, what, when, where, which) questions 	<ul style="list-style-type: none"> Ask WH- questions Describe pictures, events, objects, people Restate facts 	<ul style="list-style-type: none"> Formulate hypotheses, make predictions Describe processes, procedures Retell stories or events 	<ul style="list-style-type: none"> Discuss stories, issues, concepts Give speeches, oral reports Offer creative solutions to issues, problems 	<ul style="list-style-type: none"> Engage in debates Explain phenomena, give examples and justify responses Express and defend points of view 	
READING	<ul style="list-style-type: none"> Match icons and symbols to words, phrases or environmental print Identify concepts about print and text features 	<ul style="list-style-type: none"> Locate and classify information Identify facts and explicit messages Select language patterns associated with facts 	<ul style="list-style-type: none"> Sequence pictures, events, processes Identify main ideas Use context clues to determine meaning of words 	<ul style="list-style-type: none"> Interpret information or data Find details that support main ideas Identify word families, figures of speech 	<ul style="list-style-type: none"> Conduct research to glean information from multiple sources Draw conclusions from explicit and implicit text 	
WRITING	<ul style="list-style-type: none"> Label objects, pictures, diagrams Draw in response to a prompt Produce icons, symbols, words, phrases to convey messages 	<ul style="list-style-type: none"> Make lists Produce drawings, phrases, short sentences, notes Give information requested from oral or written directions 	<ul style="list-style-type: none"> Produce bare-bones expository or narrative texts Compare/contrast information Describe events, people, processes, procedures 	<ul style="list-style-type: none"> Summarize information from graphics or notes Edit and revise writing Create original ideas or detailed responses 	<ul style="list-style-type: none"> Apply information to new contexts React to multiple genres and discourses Author multiple forms/ genres of writing 	

Common Acronyms and Terms

ELL or EL	English Language Learner or English Learner
ESL	English as a Second Language
LEP	Limited English Proficient - students who have a non-English language background
FEL	Former English Learner
LAT	Language Assessment Team (NRC program team and EL teacher)
Low Incidence	Fewer than twenty LEP students of one language group
High Incidence	Program usually having 20 or more of one language group enrolled in a school sending district or schools
Integration	In the context of Chapter 71 A, integration means students receiving services are engaged in meaningful learning activities with their peers
SEI	Sheltered English Immersion – a program model whereby instruction and materials are in English and utilize sheltered instruction techniques.
ELD	English Language Development – a methodology through which the development of language and academic content skills are promoted simultaneously and may utilize native language for clarification purposes.
MA SIMS Classification	Massachusetts Student Information Management System classification. Students requiring services are labeled as LEP, students who no longer receive EL services are coded as FEL.
Native Language	First language of the learner
SLIFE	Students with Limited or Interrupted Formal Education
WIDA	A consortium of 40 states that provides curriculum frameworks, assessment, and English language proficiency standards for ELs. The WIDA ELD standards promote academic language development for ELs in four core content areas: language arts, mathematics, science, and social studies, and thereby facilitate students' success in school. The standards promote a collaborative instructional approach in which EL and content area teachers work together to promote ELs' language development throughout the school day – thus maximizing language and content area learning.
ACCESS	Assessing Comprehension and Communication in English State-to-State for English Language Learners - a secure large-scale English language proficiency assessment given to K-12 students who have been identified as English learners (ELs).

RETELL	Rethinking Equity and Teaching English for English Language Learners. RETELL brings a systemic approach that combines professional development in Sheltered English Immersion (SEI) for educators and a new set of English language development standards and assessments for ELLs.
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STEP-BY-STEP PROCEDURES Prior to Enrollment in a Valley Program

Below you will find an overview chart of the step-by step process along with explicit details and directions for each step. Following that is a graphic representation in the form of a flowchart.

	Accomplished By	Task	EL artifacts required prior to enrollment in a Valley program
STEP 1: Registration of new student	Sending District Administration	Obtain Home Language Survey. If language other than English is spoken at home, interview parents for language skills and contact EL teacher.	To be included in referral paperwork and necessary for enrollment in Valley program
STEP 2: Assessment	EL Teacher provided by Sending District	Assess language proficiency using WIDA Screener for K-12 or Pre-LAS for Pre-K. If established EL status, assess using ACCESS If FEL, identify need to monitor.	Results to be included in referral paperwork and necessary for enrollment in Valley program
STEP 3: Placement	Sending District Team and Valley Program Team	Review prior student records, interview parent/guardian, review assessment results. Determine placement in SEI classroom and EL support. If EL, develop learning plan using ACCESS, WIDA Screener, IEP MCAS and any other relevant assessments that are available. Information gathered from parent/guardian, teacher, and student should also be considered.	If an EL Learning Plan is required, it is to be included in referral paperwork and necessary for enrollment in Valley program If an EL Learning Plan is required, prior to enrollment in a Valley Program, Learning Plan is reviewed with Sending District and a mutually agreed upon service delivery model
STEP 4: Initial Notification of Parents	Sending District EL teacher or Sending District Administration	Notify parents in writing of program, options, and rights.	A copy of the written notification to parents/guardians to be included in referral paperwork and necessary for enrollment in Valley program If parents/guardians have chosen to opt-out, a copy of the current annual opt-out form/waiver to be included in referral paperwork and necessary for enrollment in a Valley program
STEP 5: Code all students	Sending District's Data and Compliance Specialist	Code students in SIMS as appropriate.	October, March, June

PROCEDURES FOR ENROLLED VALLEY STUDENTS

ANNUALLY: Assessment of language proficiency. Review/ Reassignment of EL Designation	Sending district EL Teacher and Valley Team	Administer ACCESS in accordance with DESE administration schedule. Review ACCESS, MCAS, report cards, writing samples, and IEP progress.	Administer ACCESS in accordance with DESE administration schedule. Review ACCESS, MCAS, report cards, writing samples, and IEP progress.
AS NEEDED: Monitor Success in Special Education Placement	Sending district EL Teacher and Valley Team	Review classroom performance, MCAS	Once designated a FEL, monitor student for four years. If student is designated as a FEL prior to enrollment in a Valley Program, documentation for the previous four years is to be included in referral paperwork and necessary for enrollment in a Valley program

PROCEDURE DETAILS FOR ENROLLED VALLEY STUDENTS

ANNUALLY: Assess language proficiency using ACCESS.

ACCESS for ELs tests are administered in accordance with DESE administration schedule to all EL students in grades K–12. ACCESS will provide raw scores, scaled scores, proficiency scores, reports for parents and teachers, student roster, school frequency, and sending district frequency.

AS NEEDED: Review/Reassignment of EL Designation

The Valley team, in conjunction with the sending district EL teacher, will review MCAS and ACCESS scores, report cards (if applicable), writing samples and IEP progress reports each year. School-based teams must also consider other relevant data to determine whether students can perform ordinary classroom work in English, and whether such students should exit the ELE program. The chart on page 7 of the *Guidance on Placement, Progress-Monitoring and Reclassification of English Language Learners* (MDESE, January 2019) provides the most recent re-classification ACCESS score and other relevant data guidelines. These guidelines are updated almost yearly, so please check the DESE website for the most up to date Guidance document.

After evaluating the available student data, if the Valley team in conjunction with the sending district EL teacher determines there is sufficient evidence of a student's English language proficiency and the ability to perform ordinary classroom work in English without significant instructional support, the team should remove the EL classification and change the student's language proficiency status to FEL. The EL teacher should notify the sending district of the change for the next SIMS sending district report. Once exited from the EL program, the student will be monitored for four years through regularly scheduled student progress meetings with results noted on sending district monitoring form and placed in the student's files at both Valley Collaborative and in the sending district.

If any student classified as a FEL fails to make academic progress, as measured by IEP progress, grades and content area or other assessments, then the Valley team will consult with the sending district EL teacher to determine if the lack of progress is due to lack of English proficiency and if the student should be re-classified as an EL student and ELE services provided. The EL teacher, in conjunction with the program team, will document the basis for the reentry, notify the student's parents and obtain the parent's consent to such reentry.

For more information about ELs with disabilities, Valley Collaborative program teams should consult DESE's Guidance for Supporting English Learners with Disabilities (<http://www.doe.mass.edu/ele/disability.html>).

SENDING DISTRICT WAIVER AND OPTING OUT PROCEDURES FOR EL STUDENTS

General Laws Chapter 71A requires that publicly-funded students in Massachusetts who are LEP be instructed through the use of SEI, unless the student wishes to opt out and be placed in a general classroom not tailored for English learners. English learners who wish to participate in a transitional bilingual program or receive some other type of language support may not do so unless they have received a waiver from the requirements of G.L. c.71A.

Opting Out Procedure

Parents may notify the sending district or collaborative of their wish to have their child opt out of the EL program. The sending district and collaborative require that a parent or guardian schedule a meeting with the EL Sending district Liaison and EL staff in order to exercise this option. The appropriate sending district form must be signed by the parents. Parents of children under 10 may opt out even if that student has not been enrolled in an EL classroom for 30 days.

In such cases, the sending district must inform the parent of the services the child would have received if enrolled in their English Language Education Programs, as well as the type of support that will be provided to the student if the parent decides to opt out. If parents of ELs decide to opt out of English Language Education Programs, since the student is already in an out-of-district placement, the student will continue with placement but will not receive additional targeted English language instruction from an EL teacher. Valley Collaborative and the sending district should maintain appropriate documentation of the parent opt out notice in the student's file. However, federal and state law requires that collaborative, provide instructional support to ensure *all* ELs, including those whose parent(s) have chosen to opt out of English Language Education Programs, have access to the curriculum and meet the same academic standards as their native English speaking peers (Title VI of the Civil Rights Act of 1964; Equal Educational Opportunities Act of 1974, 20 USC §1703(f); G.L. c. 71A § 7). Sending districts and collaboratives are also required to annually assess the language proficiency of all EL students. Therefore, in practice, a parent's choice to opt out means their child will not receive separate EL instruction focused on language development, but the sending district and Valley Collaborative still must ensure that it continues to meet the student's English-language and academic needs. For example, Valley Collaborative could place such students in classrooms where they receive sheltered content area instruction with a teacher qualified to teach ELs, provide additional literacy and language support, or establish structured opportunities for the students' content area teachers to plan content area instruction in collaboration with the sending district EL teacher. Valley Collaborative must also keep a record of how such students are provided meaningful access to the curriculum and how such students are progressing academically. Finally, EL students who are no longer participating in any English Language Education Programs ("opted out") must still be classified as EL in the sending district reports and participate in the state's annual language proficiency assessment, ACCESS for ELs. Parents must be notified of their child's participation in such assessments, as well as assessment results. Parents will also be

notified annually of the plan to meet the English language learning needs of their child if English language proficiency assessments indicate their student is not yet proficient. Parents and Legal Guardians have the right to change their decision to opt-out of ELE services and request their EL enter into an ELE program at any time.

Waiver from English Language Education Programs

If the sending district has obtained a waiver for an EL student from English Language Education Programs, the sending district must provide Valley with a copy of the waiver.

STUDENT ASSESSMENTS

The assessment results from any of the instruments indicated below are to be used as resources and guides by the EL team when making entry or exit into programs. Results of sending district, state, and school-based assessments are used to provide additional information on the academic performance of the student. Since most students attending Valley Collaborative have individualized learning needs, assessments may need to be modified and/or results analyzed with the student's special learning needs considered by the Team.

Descriptions of Assessments

State and federal laws require that EL students participate in statewide testing. Massachusetts students will meet the testing requirements by participating in both the ACCESS for ELs tests and Massachusetts Comprehensive Assessment System (MCAS) or the Alternate versions of these assessments.

ACCESS for ELs

EL students must be assessed annually to measure their English language proficiency and progress in learning English in the four domains of reading, writing, listening, and speaking. Students in grades K–12 who are identified as EL/LEP **must participate** in ACCESS for ELs testing or the Alternate ACCESS for ELs for their grade, as follows:

- students who were reported as EL/LEP in October SIMS AND
- students who enroll in school after the October SIMS submission and prior to January who will be reported as EL/LEP in the March SIMS.

Principals/Testing Coordinators should review the information found at the following link for details on test-ordering, participation, accommodations, etc.:

<http://www.doe.mass.edu/mcas/access/>.

A very small number of EL students are *not* required to participate in ACCESS for ELs tests, as described on the next page:

Students Not Required to Participate in Some or All of the ACCESS for ELs test

- EL students reported as LEP in October SIMS who have **exited LEP (EL) status** before the beginning of the testing window (i.e., before January). **Note:** The “LEP” designation for students who exit ELL status prior to testing **must be removed** in the sending district’s March SIMS submission.
- If a student meets the criteria to receive the ELA read-aloud special access/nonstandard accommodation and this is already listed in the IEP or 504 plan, the student must take Listening, Speaking, and Writing, but *not the* Reading test. The school *may* administer the Reading test to the student, at their discretion, to receive an overall score and proficiency level.
- EL students whose primary disability is reported as “deaf” must take the Reading and Writing tests, but *not* the Listening and Speaking tests.
- EL students whose primary disability is reported as “blind” must take the Braille version of the Reading and the Writing tests, but *not* the Listening and Speaking tests.
- EL students in Kindergarten with significant disabilities do not participate in the Alternate ACCESS for ELs—only students in grades 1–12.
- EL students with significant cognitive disabilities who are designated for MCAS-Alt, or are in grades 1 or 2 and would be likely to take MCAS-Alt in the future, do not take standard ACCESS tests, but participate instead in the **Alternate ACCESS for ELs**.

Massachusetts Comprehensive Assessment System (MCAS)*General Participation Requirements*

EL students must participate in all MCAS tests scheduled for their grades regardless of the language program and services they are receiving or the amount of time they have been in the United States. The only exception applies to first year EL students who enrolled in U.S. schools after the March SIMS submission for the prior year. Schools have the option of administering ELA tests to first-year EL students provided they have also participated in ACCESS for ELs testing. First-year EL students must participate in MCAS Mathematics and Science and Technology/Engineering tests, but results will be reported only for diagnostic purposes and will not be included in school and sending district summary results or in state and federal accountability reporting. Details about participation should be reviewed yearly by Principals/Coordinators at <http://www.doe.mass.edu/mcas/participation.html>.

Use of Bilingual Word-to-Word Dictionaries and Glossaries by EL Students on MCAS

Any EL student, including students who have been identified as ELL at any time in the past, may use an authorized bilingual word-to-word dictionary and/or glossary on the following MCAS tests: ELA—authorized word-to-word dictionary (if available), Mathematics—authorized word-to-word dictionary and glossary (if available), Science and Technology/Engineering—authorized word-to-word dictionary and glossary (if available).

Dictionary use for MCAS testing is strictly limited to those that provide word-to-word translations. Dictionaries that include definitions, synonyms, antonyms, phrases, and other information are strictly prohibited. A list of authorized bilingual dictionaries and glossaries is available on the Department’s website. Students for whom use of a bilingual Word-to-

Word Dictionary or Glossary is recommended, should have practice in the use of such dictionaries or glossaries throughout the year, not just on the day of MCAS administration.

THE EDUCATIONAL PROGRAM

Depending upon the assessment results, students may receive English Language Development lessons in addition to being placed in a Valley Collaborative classroom using Sheltered English Immersion

EL Program Overview and Curriculum Resources

The sending district EL teacher and Valley team will develop individual student learning goals and will review these each year to accommodate the needs of EL students requiring services. Language proficiency levels will be determined from assessments, student work samples, and recommendations from EL and classroom teacher(s). The EL teacher will consult with the Valley team to prepare the instructional program for each student. Instruction will focus on reading, writing, listening, speaking, vocabulary development, study skills, and cultural orientation. A combination of push-in and pull-out services will be offered depending on the proficiency and needs of the student. The curriculum is researched-based, focuses on language acquisition, and develops the student's ability to develop academic language and achieve academic standards.

The collaborative ensures that ELs are taught to the same academic standards and curriculum as all students and provides the same opportunities to master such standards as other students. The Collaborative uses grade appropriate content objectives for ELs that are based on the Collaborative curricula in English language arts, history, social science, mathematics, and science and technology/engineering, taught by qualified staff members.

EL Program Scheduling Guidelines

The following DESE guidelines for EL instruction along with the student's special education needs should be considered when planning instructional times.

	English Language (EL)	Content Classes
WIDA Levels 1, 2, 3 (ACCESS scores 1.0-2.4)	Two or three periods (a period is 45 minutes) per day of direct EL instruction, delivered by a licensed ESL teacher.	Other hours as available outside of EL instruction, delivered by a teacher qualified to teach ELLs and licensed in the appropriate content area or special education.
WIDA Levels 3, 4, 5, 6 (ACCESS scores 2.5 and higher)	One period (a period is 45 minutes) per day of direct EL instruction, delivered by a licensed ESL teacher.	Other hours as available outside of EL instruction, delivered by a teacher qualified to teach ELs and licensed in the appropriate content area or special education.

Valley Collaborative uses WIDA's English Language Development Standards and the Massachusetts Curriculum Frameworks. Language functions and forms targeted during EL instruction are taught within rich, contextualized, and meaningful contexts. Valley Collaborative utilizes the research-based Structured English Immersion model to meet the instructional and content needs of EL students. In this model, the special education teacher provides instructional strategies and differentiation to meet the language and literacy needs of the students.

MONITORING PROGRESS OF EL STUDENTS

Each EL student will be evaluated annually for English proficiency and content skills using the WIDA ACCESS testing system, or alternate ACCESS if indicated. All EL students will participate in the MCAS/MCAS Alt. testing appropriate to their grade levels. These results will be documented in the student's file and submitted to the EL teacher (if student is receiving services) who will document these in the EL folder. Copies of all results will be provided to the parents/guardians.

Students at Valley Collaborative are monitored quarterly for IEP progress. Students who have been identified as EL with academic and language goals on their IEP, will have their English language proficiency progress monitored simultaneous with their progress on their IEP. The IEP Team, in conjunction with the sending district EL teacher, will gather information to summarize the student's progress in developing English language

proficiency. For EL students who only have social and/or behavioral goals on their IEP, the sending district EL teacher, if one is providing instruction, will write a progress report to go home with each report card. In the case of a student whose parents/guardians have opted out of direct ELE instruction from the sending district EL teacher, the team will monitor the progress of the students EL development through the IEP process. If the student requires additional services beyond that provided by the IEP team to assist the student in meeting academic and linguistic needs, those supports will be identified and provided in consultation with the sending district EL teacher.

EXIT AND RECLASSIFICATION PROCEDURES

EL teachers use WIDA ACCESS results to determine whether a student should be exited. Students may be exited from the EL program when they have achieved an overall composite score on the ACCESS of a 4.2 or greater and a composite literacy score (reading and writing) at or above 3.9. Please refer to most recent DESE Guidance as recommended scores are sometimes adjusted.

EL teachers, in conjunction with the IEP Team, will also look at student MCAS scores. Report cards, student scores on locally administered academic assessments such as Benchmark Assessment System, SLEPs, Individualized Learning Plans, writing samples, classwork, and teacher input are also used.

When it has been determined that a student is proficient enough to be exited from the EL program, parents should be notified in writing by the sending district of the reclassification.

MONITORING OF FEL STUDENTS

All students who have exited from the EL Program and reclassified as FEL (Former English Learner) will be monitored for satisfactory academic progress for at least four years. If necessary, these students may be re-identified as being LEP and re-entered into the EL program.

The sending district EL teacher will be responsible for coordinating the reclassification process. At least annually, the sending district EL teacher will meet with the IEP Team to determine if student is continuing to progress or having difficulty due to limited English proficiency. If a student is not progressing and is having difficulty due to limited English proficiency, the sending district EL teacher should also observe the student in class. A student may be re-identified as being LEP after a meeting the sending district EL teacher, IEP Team, and parents. Valley Collaborative's Monitoring Form for EL/FEL Students will be completed and filed in each student's record.

The following indicators will be used for monitoring purposes: IEP progress reports and report card grades (when applicable); MCAS results(when applicable); Individual Education Plans; teacher/IEP Team feedback and comments regarding areas of concern in different curriculum areas; counselors' input; interventions and instructional modifications being used to ensure student success.

If a FEL student is re-designated as an LEP student, the LEP student will be educated in accordance with G.L.c.71a and will be immediately provided with the services and options required under state and federal law, including educating the student in SEI Valley classrooms along with direct EL instruction provided by the sending district as needed. Parents will be notified accordingly.

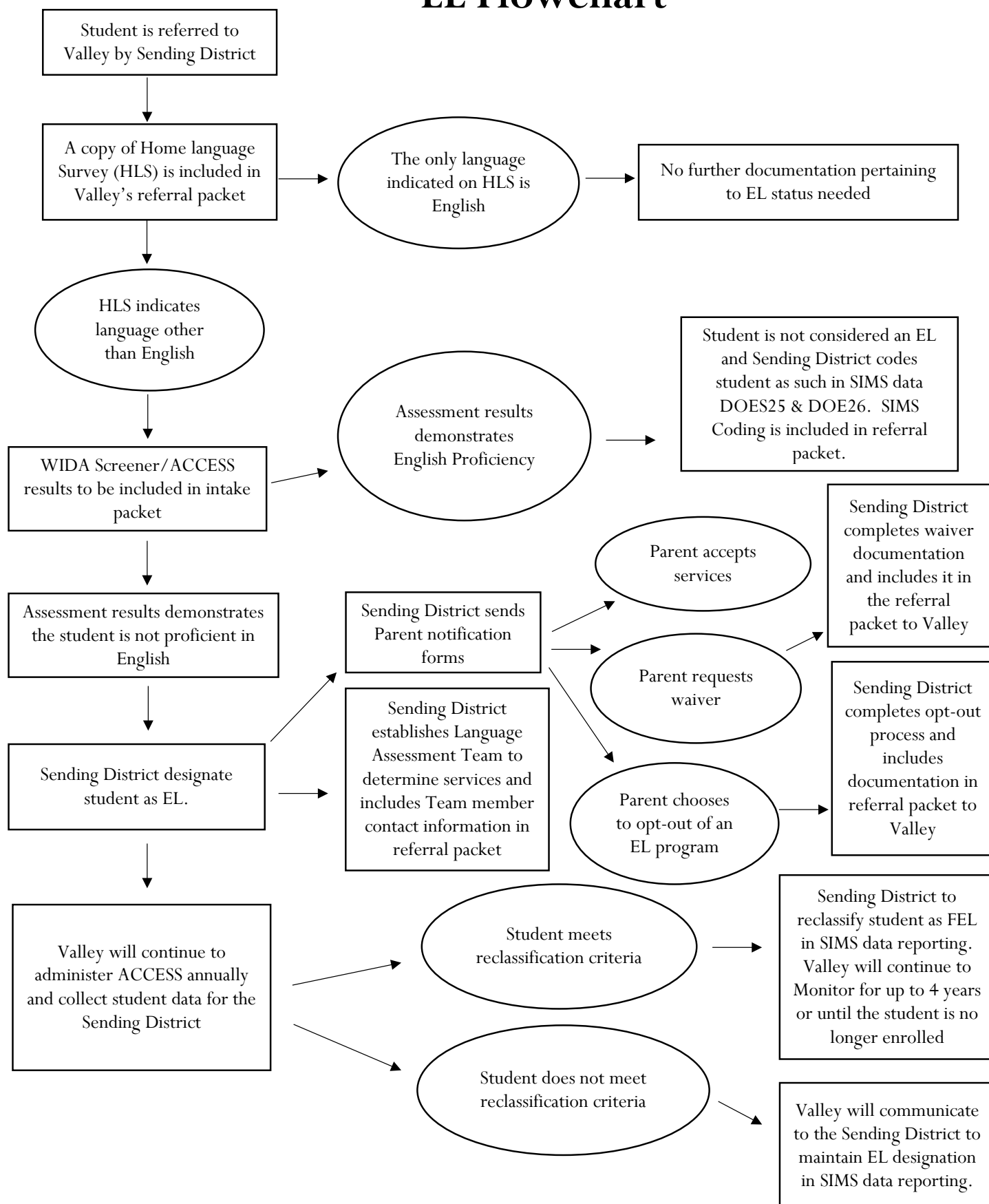
TRANSLATOR AND INTERPRETER INFORMATION

Parents whose primary language is not English, have the right to receive information in their primary language and are entitled to interpretive services for phone calls, meetings, or conferences.

The Collaborative arranges for a person or community organization to provide translation services and oral interpretation services for any notices to parents/guardians and/or students and program information or material regarding the Collaborative to ensure the civil rights of any student and his/her family with limited English proficiency.

Translation and interpretive services are the responsibility of the sending district as per 603 C.M.R. 28.07 (8).

EL Flowchart



Appendix B**MONITORING FORM FOR EL/FEL STUDENTS**

Valley Collaborative, in conjunction with the sending district EL Teacher, monitors the academic progress of English Learners each year and Former English Learners for four years after students are removed from EL status.

Please complete this feedback form. Your responses will help with the development of a progress report for the student.

STUDENT: _____ GRADE: _____

DATE OF EXIT: _____

CURRENT EL STATUS: _____

CHECK ONE FOR FEL: ☐ YR 1 Monitor ☐ YR 2 Monitor ☐ YR 3 Monitor ☐ YR 4 Monitor

TEACHER: _____ SUBJECT: _____

Question	Always	Often	Sometimes	Seldom	Rarely
Communicated effectively in English.					
Completes assignments independently.					
Struggles with oral expression.					
Struggles with listening comprehension.					
Struggles with reading comprehension.					
Participates in class.					

Is the student meeting grade level academic standards as able based on current IEP?

☐ Yes

☐ No

In your opinion, the student...

☐ No longer needs EL support services. His/her language proficiency is strong enough for him/her to access the curriculum and perform at or above grade level in completing the required work in the classroom.

☐ May need EL services again. Let's discuss.

☐ May need other services. Let's discuss.

Additional Comments or Concerns:

Teacher's Signature

Date

Appendix C

**Valley Collaborative
School Year 2020-2021
MONITORING ACADEMIC PROGRESS OF OPT-OUT STUDENTS**

Federal law establishes a district's obligation to provide ELs with meaningful access to the educational program. When a parent declines participation in a formal language instruction program, the district must continue monitoring the educational progress of the student to ensure that the student has an equal opportunity to have his or her English language and academic needs met.

Student Name: _____	Home language: _____
Opt-out Date: _____	Years in U.S. Schools: _____
SASID: _____	DOB: _____
School: _____	Grade: _____

ATTENDANCE / TARDY DATA				
	Term 1	Term 2	Term 3	Term 4
Attendance				
Tardy				

ENGLISH	Test Scores					
	MCAS:	ACCESS:	OTHER:			
	Term 1 ☐		Term 2 ☐	Term 3 ☐	Term 4 ☐	
			RARELY	SELDOM	SOMETIMES	OFTEN
						ALWAYS
	Communicates effectively in English					
	Homework completion					
	Struggles with oral expression					
	Struggles with written expression					
	Classroom participation					
	Discipline issues that interfere with his or her progress					
	Struggles with oral comprehension					
	Struggles with reading comprehension					

Appendix C

MATH	Test Scores					
	MCAS:			OTHER:		
	Term 1 ☐		Term 2 ☐	Term 3 ☐	Term 4 ☐	
		RARELY	SELDOM	SOMETIMES	OFTEN	ALWAYS
	Communicates effectively in English					
	Homework completion					
	Struggles with oral expression					
	Struggles with written expression					
	Classroom participation					
	Discipline issues that interfere with his or her progress					
	Struggles with oral comprehension					
	Struggles with reading comprehension					

Appendix C

SCIENCE	Test Scores					
	MCAS:			OTHER:		
	Term 1 ☐		Term 2 ☐	Term 3 ☐	Term 4 ☐	
		RARELY	SELDOM	SOMETIMES	OFTEN	ALWAYS
	Communicates effectively in English					
	Homework completion					
	Struggles with oral expression					
	Struggles with written expression					
	Classroom participation					
	Discipline issues that interfere with his or her progress					
	Struggles with oral comprehension					
	Struggles with reading comprehension					

SOCIAL STUDIES	Test Scores					
	MCAS:			OTHER:		
	Term 1 ☐		Term 2 ☐	Term 3 ☐	Term 4 ☐	
		RARELY	SELDOM	SOMETIMES	OFTEN	ALWAYS
	Communicates effectively in English					
	Homework completion					
	Struggles with oral expression					
	Struggles with written expression					
	Classroom participation					
	Discipline issues that interfere with his or her progress					
	Struggles with oral comprehension					
	Struggles with reading comprehension					

Appendix C

Please, check the one that applies:

- ☐ At a meeting on (date) _____ the Language Acquisition Team reviewed the student's performance and concluded that he/she meets grade level academic standards.
- ☐ At a meeting on (date) _____ the Language Acquisition Team reviewed the student's performance and concluded that language proficiency **IS NOT** a significant reason the student is not meeting grade level academic standards. Student was/ will be referred to Student Support Team on (date) _____.
- ☐ At a meeting on (date) _____ the Language Acquisition Team reviewed the student's performance and concluded that language proficiency **IS** a significant barrier preventing the student from meeting grade level academic standards.

Action Steps (check all that apply)

- ☐ **English language support**
- ☐ **After school tutoring**
- ☐ **Core academic tutoring**
- ☐ **Parent communication**
- ☐ **Summer school**
- ☐ **Other (Please, explain)**

Date: _____

Team members: _____

Signatures: _____



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Jessica Scalzi, Lead Nurse
Date: April 28, 2022
Re: COVID-19 Update

Positive cases from 4/3/22-4/15/22
Elementary: 3
Middle: 0
High: 7
Adult Program: 0

After a few weeks of no positive cases, there has been an uptick in positive COVID-19 cases in Valley Collaborative and throughout Massachusetts. Valley Collaborative is offering weekly COVID-19 at home testing. Currently, we have 78 students and 128 staff participating in at home testing. Only positive tests are reported to nursing of the at home tests. The Nursing Department at Valley is continuing to test during school days for symptomatic individuals.

Our Today and Tomorrow program individuals is also participating in at home weekly COVID-19 testing, total participants 61. COVID-19 tests have been provided through DDS and DPH.

Required Action:

None

Attachments:

None



Central Administration

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MEMORANDUM

To: Valley Collaborative Employees
From: Kari Morrin, Director of Human Resources
Jessica Scalzi, Lead Nurse
Date: January 28, 2022
Re: Mask Mandate Extension & Compliance

This is a reminder that the Department of Elementary and Secondary Education (DESE) has extended the mask requirement for students, families, visitors, and staff through February 28, 2022, regardless of vaccination status. Please find the regulations regarding wearing a mask attached to this memo. As Valley has not reached 80% vaccination status, masks must be worn at all times while indoors and on Valley vans, unless eating/drinking.

If you have a medical reason that prevents you from adhering to the mask requirement set forth by the Department of Public Health and DESE, the mask mandate contains an exemption. If this applies to you, please submit a doctor's note to hr@valleycollaborative.org. Out of necessity, noncompliance to these mandatory regulations by Valley staff will lead to disciplinary actions, including being sent home without pay.

Attachments: Extension of DESE Mask Requirement Updated January 10, 2022



Extension of DESE Mask Requirement

Updated January 10, 2022

At the special meeting of the Board of Elementary and Secondary Education (Board) on August 24, 2021, the Board voted to declare “exigent circumstances” pursuant to the Student Learning Time regulations, 603 CMR 27.08 (1), and authorized the Commissioner of Elementary and Secondary Education to require masks for public school students (age 5 and above) and staff in all grades through at least October 1, 2021.¹ The Commissioner subsequently extended the mask requirement to November 1, 2021 and then to January 15, 2022.

The mask requirement remains an important measure to keep students safe in school at this time. Consistent with the authority provided by the Board, and after consulting with medical experts and state health officials, **the Commissioner is extending the mask requirement through February 28, 2022.** The Department will continue to work with medical experts and state health officials to evaluate the mask requirement beyond February 28.

The 80 percent threshold policy remains in effect.² Whether or not a school or district avails itself of the 80 percent vaccination off-ramp is a local decision to be made by school and district leaders in consultation with local health officials. In alignment with statewide guidance, it is highly recommended that unvaccinated students and staff continue wearing masks.

The following mask requirements remain in effect through February 28, 2022:³

- Public school students (age 5 and above) and staff in all grades are required to wear masks indoors in schools, except as noted below. Masks are not required when outdoors. All visitors are also expected to wear a mask in school buildings.
- Masks should cover an individual’s nose and mouth. For more information about appropriate mask use, please see: <https://www.cdc.gov/coronavirus/2019-ncov/downloads/cloth-facecovering.pdf>.
- It is strongly recommended that students younger than age 5 also wear a mask in school.
- Students and staff who cannot wear a mask for medical reasons and students who cannot wear a mask for behavioral reasons are exempted from the requirement. Face

¹ The mask requirement is an exercise of the Board’s responsibility to ensure students attend classes in a safe environment. G.L. c. 69, § 1B. It is also an exercise of the Board’s authority to set policies relative to children’s education, including ensuring that students receive the required amount of structured learning time through in-person instruction. G.L. c. 69, §§ 1, 1B, 1G; G.L. c. 71, §§ 1 & 4A; 603 CMR 27.08.

² Information about the Vaccination Rate Threshold is available here: <https://www.doe.mass.edu/covid19/on-desktop/2021-0927vax-rate-guidance.docx>

³ These requirements apply to all public schools, including charter schools, vocational technical schools, and educational collaboratives. They also apply to approved private special education schools.

shields may be an option for students with medical or behavioral needs who are unable to wear masks or face coverings. Transparent masks may be the best option for both teachers and students in classes for deaf and hard of hearing students.

- The mask requirement applies when students and staff are indoors at school, except when eating or drinking or during mask breaks.
- Mask breaks may occur throughout the day. If feasible, breaks should occur when the windows are open, or students are outdoors. As a reminder, meals and outdoor recess provide built-in mask breaks for students and staff.
- Masks may also be removed indoors when necessary to participate in elective classes, such as the use of wind instruments in band. When traditional masks cannot be worn, districts should consider additional mitigations, such as the use of instrument masks (masks with a slit or hole cut for the mouthpiece) or bell covers, along with physical distancing or outdoor classes as feasible.
- Masks are required for any sports-related activity for student-athletes and coaches when indoors, in alignment with guidance provided by the Massachusetts Interscholastic Athletic Association (MIAA).
- Masks should be provided by the student/family, but disposable masks should be made available by the school for students who need them.
- By federal public health order, all students and staff are required to wear a mask on school buses.
- Whether and when a student should be disciplined for failure to wear a mask is a local decision, guided by the district's student discipline policy and the particular facts. Districts should consult with their legal counsel to address these matters. Districts should provide written notice to students and families about expectations and potential consequences and are encouraged to use a progressive discipline approach. The mask requirement includes an exemption for students who cannot wear a mask due to medical conditions or behavioral needs. Further, some students with disabilities may need additional supports to wear masks and may need to be accommodated. Districts are encouraged to consider and implement alternatives before resorting to disciplinary exclusion. Keeping students connected with school is especially important this year, after the disruptions so many have experienced. .



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Communications

The following communications are attached for your review:

State Agencies

- DESE FY'21 Annual Report Approval Letter
- DESE FY'21 Annual Independent Audit Report Approval Letter
- Memo to Commissioner Jeffrey C. Riley, Massachusetts Department of Elementary and Secondary Education (DESE)

Valley Program Updates

- Elementary School Update
- Alternative Programming Middle School and Transitional High School Update
- Transitional Programming Middle School and Transitional High School Update
- Adult Services Update

Community and Staff

- Massachusetts Department of Elementary and Secondary Education (DESE) Deputy Commissioner Regina M. Robinson – Keynote Speaker for Valley's Opening Day 2022-2023
- Special Education Directors Update
- Email from Christopher Malone, Retired Superintendent, Tewksbury Public Schools
- Valley Board Member Appointment
- Valley Collaborative Transitional High School Graduation
- Valley Collaborative Basketball Team
- Valley Organizational Chart
- Valley's Spring Newsletter

Required Action:

None



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Communications – State Agencies

The following communications are attached for your review:

State Agencies

- DESE FY'21 Annual Report Approval Letter
- DESE FY'21 Annual Independent Audit Report Approval Letter
- Memo to Commissioner Jeffrey C. Riley, Massachusetts Department of Elementary and Secondary Education (DESE)

Required Action:

None



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

TO: Chris Scott, Executive Director
FROM: Ruth Hersh and Paulajo Gaines, Education Collaborative Team
DATE: February 16, 2022
RE: Valley Collaborative FY21 Annual Report

Thank you for submitting the Valley Collaborative (Valley or the Collaborative) FY21 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. We ask that you share this memo with the Valley Board of Directors (Board) at their next meeting.

The Annual Report Compliance Review table below, outlines the reporting requirements, and whether or not the Collaborative has satisfied those requirements. As a result of this review, if it is determined that additional information is needed to complete our review, it is noted at the end of this memo.

Annual Report Compliance Review

<u>REPORTING REQUIREMENTS</u>	<u>SATISFIED</u>
Information on the programs and services provided by the Collaborative.	Yes
Discussion of the cost-effectiveness of all programs and services.	Yes
Progress made toward achieving the objectives and purposes set forth in the Collaborative agreement.	Yes
Evidence of approval of the annual report by the Board.	Yes
The annual report is posted to the Valley website.	Yes

Additional Information Needed

None

If you have any questions about this memo, please email the Education Collaborative Team at educationcollaborativeteam@mass.gov.



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

MEMORANDUM

TO: Chris Scott, Executive Director
FROM: Ruth Hersh and Paulajo Gaines, Education Collaborative Team
DATE: January 28, 2022
RE: Valley Collaborative FY21 Annual Independent Audit Report

Thank you for submitting the Valley Collaborative (Valley or the Collaborative) FY21 Annual Independent Audit Report. This memo confirms that the Education Collaborative Team at the Massachusetts Department of Elementary and Secondary Education (Department) has reviewed your submission to determine its compliance with the reporting requirements of M.G.L. c. 40, § 4E and CMR 603 CMR 50.00.

As a part of this review, we examined the Collaborative's independent audit report and financial statements. The Independent Audit Compliance Review table below, outlines key audit reporting requirements, and whether or not the Collaborative has satisfied those requirements. We ask that you share this memo with the Valley Board of Directors (Board) at their next meeting.

Independent Audit Compliance Review

<u>REPORTING REQUIREMENTS</u>	<u>SATISFIED</u>
<i>Per M.G.L. c. 40, § 4E(d) and 603 CMR 50.00:</i>	
Names, duties, and total compensation of the five most highly compensated employees.	Yes
Transactions between the collaborative and any related for-profit or non-profit organization.	Yes
Amounts expended on services for individuals aged 22 years and older.	Yes
Amounts expended on administration and overhead.	Yes
Any accounts held by Valley that may be spent at the discretion of another person or entity.	Yes
Transactions or contracts related to purchase, sale, rental, or lease of real property.	Yes
<i>Per M.G.L. c. 40, § 4E(c)(m) and 603 CMR 50.07(9):</i>	
Reported collaborative fund cumulative surplus.	Yes*

<i>Per M.G.L. c. 40, § 4E(d) and 603 CMR 50.08(2):</i>	
Evidence of approval of the collaborative independent audit by the Board.	Yes
Audit Report is posted to the collaborative website.	Yes
<i>* The Collaborative's cumulative surplus as of June 30, 2021, was \$5,266,193, or 31.91 percent, which exceeded the limitation on cumulative surplus. Upon certification of the cumulative surplus, the Board took action to reduce said surplus by voting to deposit \$1,140,580 to an approved OPEB Trust fund. This action reduced the surplus to a permissible level of 25 percent.</i>	

In addition to our review, we will provide a copy of the Valley FY21 Annual Independent Audit and this memo 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 memo, please email the Education Collaborative Team at educationcollaborativeteam@mass.gov.



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Commissioner Jeffrey C. Riley, Department of Elementary and Secondary Education
From: Dr. Chris A. Scott, Executive Director
Date: March 15, 2022
Re: Thank you

Dear Commissioner Jeffrey C. Riley,

Valley Collaborative has recently completed its Coordinated Program Review (CPR). We have been told that we will receive a final report with no findings. We are pleased that Valley's commitment to excellence has been recognized by the Department. We also wanted to take this opportunity to extend a heartfelt thank you to the Department and specifically to Christine Romancewicz, Specialized Programs Liaison and Helen Murgida, Approvals & Complaint Specialist, for their professionalism and support throughout this past year in which Valley has been undergoing the Coordinated Program Review process. While they were onsite for the review, their collaborative approach put staff and students alike at ease and made it a positive experience for all involved. We felt their efforts went above and beyond and wanted to share this positive feedback with you. Below please find communication regarding our Valley's CPR process that was sent out to the Valley Community.

Attachments:

Email

From: Chris Scott

Sent: Monday, March 14, 2022 1:50 PM

To: Brad Morgan <bmorgan@nmrsd.org>; Denise Pigeon <dpigeon@nashobatech.net>; Dr. Christopher Chew <cchew@westfordk12.us>; Dr. Jay Lang <langi@chelmsford.k12.ma.us>; Dr. Laura Chesson <lchesson@gdrsd.org>; Dr. Michael Flanagan <michael.flanagan@tyngsboroughps.org>; Mr. Steven Stone <ssstone@dracutps.org>; Mr. Tim Piwowar <tpiowar@billericak12.com>; Brenda Theriault-Regan <bregan@tewksbury.k12.ma.us>

Cc: Romancewicz, Christine (DOE) <christine.romancewicz@state.ma.us>; Amy Emory <aemory@billericak12.com>; Amy Reese <reesea@chelmsford.k12.ma.us>; bbrooks@nmrsd.org; Courtney Moran <cmoran@westfordk12.us>; Jill Greene <jgreene@gdrsd.org>; Kimberly Lawrence <klawrence@dracutps.org>; Michelle Touma Valhouli <mvalhouli@nashobatech.net>; rpelletier@tewksbury.k12.ma.us; Sarah Lewenczuk <Sarah.lewenczuk@tyngsboroughps.org>

Subject: Coordinated Program Review

Dear Board Members,

I am pleased to report that Valley has concluded its Coordinated Program Review with DESE that began in March 2021 and included three days of onsite review and 24 staff interviews. We were just informed by Christine Romancewicz, DESE Specialized Program Liaison, during our exit interview, that from her perspective Valley has achieved an “A+” and will be receiving a final report with no findings. Please find below the reoccurring themes Ms. Romancewicz mentioned during Valley’s exit interview.

- DESE Parent survey results indicated that families were extremely pleased with their child’s placement at Valley, quoting “they have found their home”, “acceptance”, “sense of safety”, etc.
- Staff were very positive and appreciate the administrative support they receive in doing what is best for students
- Staff were very committed to the mission and vision of Valley
- From the paraprofessional in the classroom to the Executive Director and everyone in between, there was a consistent message regarding Valley’s procedures and professional responsibilities and commitment to the students we educate
- Rigorous academic curriculum across all programs was observed
- A supportive culture for both students and staff across all programs was observed
- Therapists, educators, and administrators worked on effective teams to deliver high quality therapeutic services and academics unique to each student at Valley
- Procedural consistency across all programs was noted
- Well trained staff across all programs was observed
- Solid systems in place across all programs to ensure compliance with all state regulations
- The Department was impressed with Valley’s timeout and restraint procedures and that students had the opportunity to de-escalate in various sensory spaces (for example “Chillville”) before a timeout or restraint was needed.

Incident reports were very detailed and explain in full the incident and the reason and rationale for all actions taken. Furthermore, a full explanation was given if a restraint or timeout room was required for a student to de-escalate.

- Students were quickly reintegrated back into the classroom after various de-escalation techniques were provided resulting in minimal disruption to time on learning which was observed across all programs
- There is no technical support needed from the Department at this time

It is a pleasure to work on such a high performing, committed and caring team. A special thank you to Joia Mercurio, Deputy Director, for her ongoing leadership and support. Valley is very fortunate to have the exemplary program Principals: Nicole Noska, Julie Fielding, Heather MacKay, and Jennifer Bergeron, along with the exceptional teams they have built of educators, therapists, and paraprofessionals. We are so fortunate to have experienced and competent leaders working with our students, families, and staff.

We also gratefully acknowledge all of Valley's support staff for the pride they take in their work which ensures clean and safe learning environments for students and staff: Renato Silva, Ian MacAulay, and Sandy Morency. The buildings have never looked better. We also want to recognize the "behind-the-scenes" hard work and dedication of the Technology Department and Administrative Support Staff: Mazyar Moshtaghi, Donna Suarez, Kelly Fitts, Karen Blackburn, Donna Driscoll and Kathy Diaz.

Completing a program review during a pandemic presents unique challenges. Staffing shortages and health care protocols were constant stressors. Thanks to Kari Morrin, Director of Human Resources, for the countless hours of hard work and dedication she has put into our workforce. Sincere appreciation to Lead Nurse Jessica Scalzi and her team, for their tireless and significant support. Lead Nurse Jessica Scalzi continues to go above and beyond to ensure all COVID procedures and protocols are followed to maintain the health and safety of students and staff.

Last but not least, I would like to thank you, Valley's Board of Directors, for your ongoing guidance and support as we navigate this important and difficult work:

- Mr. Timothy Piwowar - Valley Collaborative Board Chair
 - o Superintendent, Billerica Public Schools
- Dr. Jay Lang - Valley Collaborative Executive Committee Member
 - o Superintendent, Chelmsford Public Schools
- Mr. Steven Stone - Valley Collaborative Board Member
 - o Superintendent, Dracut Public Schools
- Dr. Laura Chesson - Valley Collaborative Board Member
 - o Superintendent, Groton-Dunstable Regional School District
- Dr. Denise Pigeon - Valley Collaborative Executive Committee Member
 - o Superintendent, Nashoba Valley Technical School District
- Mr. Brad Morgan - Valley Collaborative Board Member

- o Superintendent, North Middlesex Regional School District
- Ms. Brenda Theriault-Regan - Valley Collaborative Board Member
 - o Interim Superintendent, Tewksbury Public Schools
- Dr. Michael Flanagan - Valley Collaborative Executive Committee Member
 - o Superintendent, Tyngsborough Public Schools
- Dr. Christopher Chew - Valley Collaborative Board Member
 - o Superintendent, Westford Public Schools

Your support of Valley's staff and the work we do is continuously demonstrated through various Board votes - most recently the generous longevity package the Board voted in order to address retention and recruitment issues we have struggled with during this pandemic. The Board's ongoing commitment to offering its staff competitive compensation, while maintaining some of the lowest tuition rates in the Commonwealth in a non-union setting, helps to ensure that we can recruit and retain staff that are among the most talented in the field. Also, noteworthy, is your support of robust and well-resourced curriculum ensuring our students are able to reach their full potential. Thank you for the confidence and trust you have in Valley to care for and educate your most vulnerable students. Please know, we are committed to maintaining the highest quality programming for your/our students and to always be deserving of your support.

Thank you.

-Chris

Chris A. Scott, Ph.D.
Executive Director



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



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Communications – Valley Program Updates

The following communications are attached for your review:

Valley Program Updates

- Elementary School Update
- Alternative Programming Middle School and Transitional High School Update
- Transitional Programming Middle School and Transitional High School Update
- Adult Services Update

Required Action:

None



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Monthly Update from
Heather Mackay, Principal Elementary School

In March, we felt the first hints of spring in the air. Now that the weather is nice, students are spending some well- deserved time outside on the playground!

We had many fun and educational events this past month. The Elementary School celebrated Read Across America Week, a Dr. Suess Magic Show, a visit from the Acton Discovery Center, and a performance from Bubble Mania! On April 8th, we held our annual Autism Walk in support of our students. We are excited for a week-long celebration of Earth Day. Officially, Earth Day is celebrated on April 22nd so we will celebrate the whole week of April 25th. We will spend the week exploring, learning about, and celebrating our planet!

Looking ahead to May, we have scheduled a barber to return to the Elementary School to cut or trim students' hair. We had over 20 students signed up from our past event in the Fall - we are hoping to increase that number! May is our month to really focus on Mental Health Awareness. During the month, we will focus on positive thinking, stress relief, self-awareness, self-care, and mindfulness. We are excited for one activity in particular, school-wide Yoga, where a professional Yoga instructor will teach a Yoga class for all the students!

We are continuing to tour new students from a number of districts that include Westford, North Middlesex, Chelmsford, Tewksbury, Wilmington and Dover, NH. Our current enrollment is 92 students at the Elementary School.

Thank you for the continued support.



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Monthly Update from
Julie Fielding, Principal Alternative Programming Middle School and Transitional High School

Quarter 3 ended just prior to break and grades/progress reports will be mailed out this week.

It's certainly been a difficult year but we are still managing to do some great things with the students. Our Valley JV and Varsity teams played in the GBBL again this year and played other out of district schools and in the tournament.

Five students (1 middle school and four high school students) and two staff went with Northeast Mountaineering to climb Mt. Washington.

In March high school students participated in the ELA MCAS. Middle School students have completed the ELA MCAS, are taking the Math MCAS this week and will be taking Science in early May.

We have one student participating in the Valley Collaborative/Middlesex Community College Dual Enrollment Program.

Referrals continue to come in at a steady pace. We are at capacity in the middle school and have a few openings in the high school programs.

The administrative team has been meeting to discuss programming for next year and changes to be made based on the profile of students that are being referred at this time.



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Monthly Update from
Nicole Noska, Principal Transitional Programming Middle School and Transitional High School

In the spirit of Spring, programming in the Transitional Programs at the Valley Middle and Transitional High School is blooming. Local non-profit, Giving Gardens has been working with 7 of our classes to teach students about where food comes from and foster interest in growing healthy food. Students began their growing with microgreens, followed by larger, take-home plants. Over the next several months, students will plant, tend to, and harvest from indoor, vertical planter towers, which have been set up in the school. During cooking classes, students will pull from the garden to incorporate their harvest into recipes. In addition to gardening, students have also learned about building balanced meals with MyPlate and reading and interpreting nutrition labels on foods.

Our school welcomed our new Chef Manager, Bridget Zanni. Bridget joins us from Salem High School where she has worked as the Culinary Arts Instructor for over 15 years. She brings with her a wealth of experience creating innovative and healthy recipes for the school run diner. The students and staff at Valley are excited for a revitalization of our school cafeteria.

Students in the Transitional High School recently returned to working at Walgreens after a 2-year hiatus due to the pandemic. Students are excited to be back at the store, setting up displays, stocking shelves, taking inventory, and monitoring expiration dates on products. Our worksite opportunities continue to grow with the addition of two new sites so far this Spring, Optical Fusion and Strongwater Farm.

With MCAS two-thirds of the way complete for the year, students in the Transitional Programs are enjoying learning outside of the classroom by attending field trips to various local attractions such as the Museum of Science in Boston, Franklin Park Zoo, Chip-In Farm, Gym Street USA, and Golf-Country. Students have been keeping active while biking the Chelmsford Rail Trail, jumping at Altitude Trampoline Park, playing laser tag at Merrimack Valley Pavilion, ice skating, and bowling.

Students, staff, and families are making their final preparations for the annual School Trip. In a few short weeks, 25 travelers from Valley Collaborative will board a charter bus to Washington, D.C. where they will follow a deluxe itinerary of sights and experiences. Staff will have one final meeting with students and families to preview itineraries and review COVID protocols. After that, all that's left to do is pack!

Looking forward to a strong finish to the school year.



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Monthly Update from
Matthew Gentile, Adult Services Program Manager

As we head into Spring, there are many reasons to be optimistic about a full return to normalcy in the Adult Services Program. The Adult Services team has hired five new staff members over the last month, which is critical to being able to bring all of our individuals back on site for in person programming. The Today and Tomorrow Program continues to offer a robust remote component of 25 hours a week, but as we add new staff, we are able to bring more individuals back on site, and back out into the community to all the wonderful employment and CBDS opportunities. With close to 70 percent of our individuals back on site in some capacity, the Adult Programs continue on the journey toward fully in-person offerings.

Valley Job Developers continue to work diligently to find new worksite and volunteer opportunities and have highlighted and coordinated the opening of three new sites over the last month and a half.

- Valley will be contracting with Definitive Technology to offer the individuals a new paid opportunity where they are assembling hospital carts for distribution around the country. The initial goal is for our individuals to assemble between 800 to 1000 hospital carts each month, as we seek to solidify a long-term partnership with Definitive.
- The individuals now have the opportunity to volunteer at Strongwater Farm in Tewksbury. There they will help maintain the farm and the living quarters of the animals while also getting the chance to meet the animals and form meaningful bonds with them.
- Valley also recently coordinated with Meals On Wheels and we now deliver food to less fortunate people in the town of Tewksbury. This is the second delivery route for Valley as we have already been partnering with them in the town of Chelmsford. The individuals continue to thrive when given the opportunity to help others in need, and the difference they make only helps to build their confidence and abilities.

Additionally, there has been a restructuring of staff responsibilities within the Adult Services programming. Heather Valcanas is no longer with the Collaborative. We thank her for her contributions and wish her well in all her future endeavors. Matt Gentile will now take on the role of Adult Services Program Manager, and he will be overseeing the staffing and day to day operations. David Illg is now in the role of Assistant Business Manager and will be managing the financial and systematic components of Adult Services. Holly Tierney will now be the Adult Services Program Coordinator and will take on the role of supervisor on the floor and act as another resource for staff and individuals.

Although there have been some changes over the last several months, they are exciting changes that should put Valley Collaborative in an advantageous position to continue growing and exceling while offering premier services to the individuals we serve.



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Communications – Community and Staff

The following communications are attached for your review:

Community and Staff

- Massachusetts Department of Elementary and Secondary Education (DESE)
Deputy Commissioner Regina M. Robinson – Keynote Speaker for
Valley's Opening Day 2022-2023
- Special Education Directors Update
- Email from Christopher Malone, Retired Superintendent,
Tewksbury Public Schools
- Valley Board Member Appointment
- Valley Collaborative Transitional High School Graduation
- Valley Collaborative Basketball Team
- Valley Organizational Chart
- Valley's Spring Newsletter

Required Action:

None



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Deputy Commissioner of Elementary and Secondary Education, Regina M. Robinson
Keynote Speaker – Valley Staff Orientation Day 2022-2023 School Year

Valley is pleased to announce that Deputy Commissioner Regina M. Robinson will be the keynote speaker for Valley's Staff Orientation Day on Tuesday, September 6, 2022.

As the date approaches and we have an agenda for the event, we will send this information along to Valley's Board of Directors.

Required Action:

None

Attachments:

None



Central Administration

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Special Education Directors Meeting
Thursday, January 27, 2022 ▪ 12:00 noon
Virtual Meeting
Agenda

- Literacy Presentation
Meghan Waters/Nick LeClair
- 2022-2023 Tuition Rates and Fees Update
- Valley's FY'22 Update
- 2022-2023 Academic Calendar and
Special Education Directors Calendar
- Programmatic Updates
- COVID Update
- Open Discussion

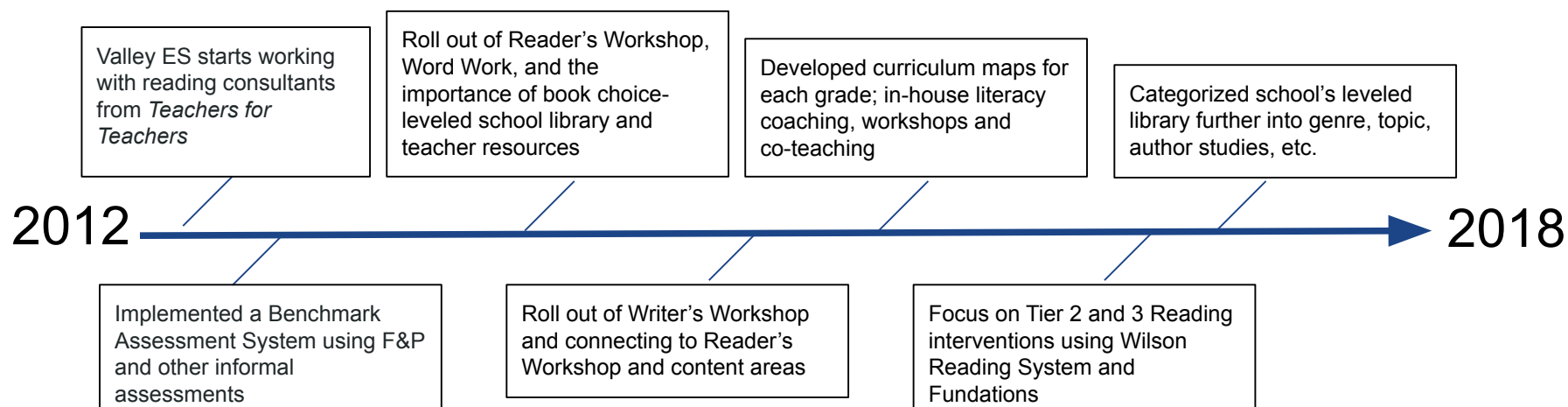
Future Meeting Dates

Thursday, April 28, 2022
Thursday, June 9, 2022

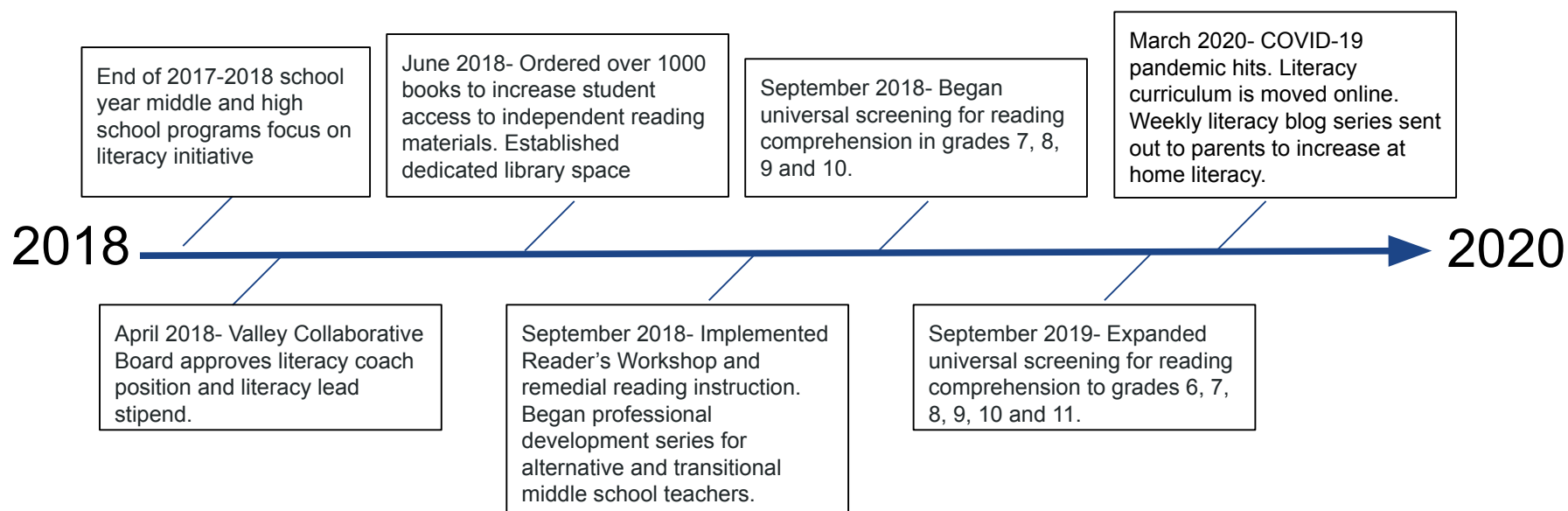
How mCLASS Supports Alignment with Massachusetts Dyslexia Guidelines

Meghan Waters M Ed., Wilson Dyslexia Practitioner
Nick LeClair M Ed., Reading Specialist
Valley Collaborative

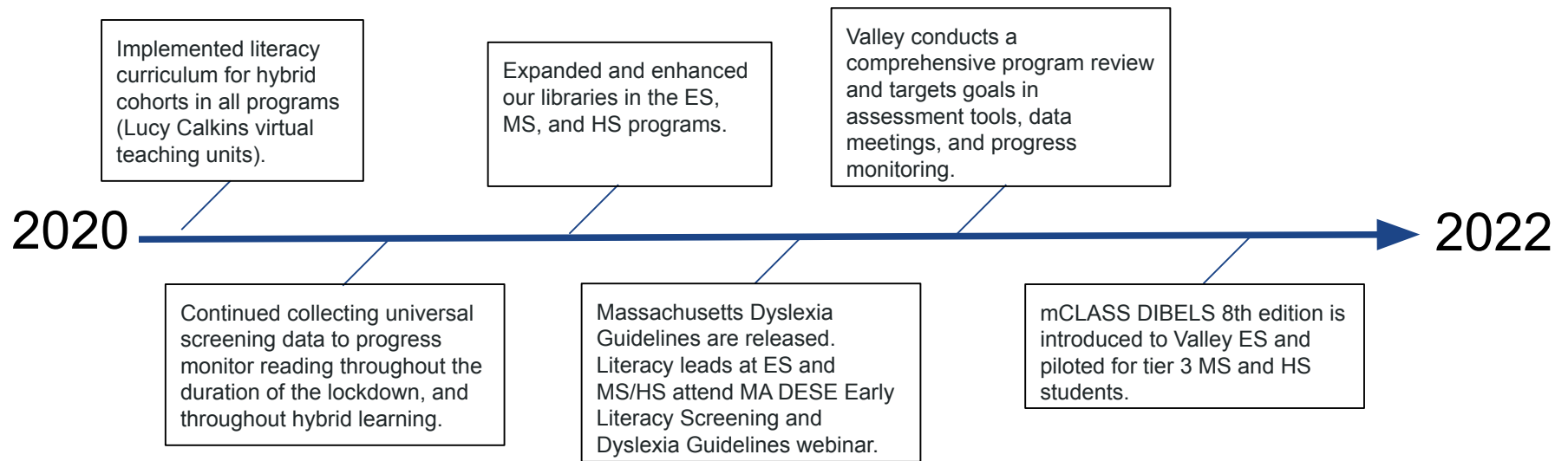
Valley Collaborative District Literacy Timeline



Valley Collaborative District Literacy Timeline



Valley Collaborative District Literacy Timeline



What is Dyslexia?

Dyslexia is a specific learning disability that is neurobiological in origin. It is characterized by difficulties with accurate and/or fluent word recognition and by poor spelling and decoding abilities. These difficulties typically result from a deficit in the phonological component of language that is often unexpected in relation to other cognitive abilities and the provision of effective classroom instruction. Secondary consequences may include problems in reading comprehension and reduced reading experience that can impede growth of vocabulary and background knowledge.

Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

What is Dyslexia?

- Approximately 24% of disabilities reported by Massachusetts' school districts are students with learning disabilities, with dyslexia recognized as one of the most common.
- The number of students identified with specific learning disabilities nearly triples between second and third grade.
- Both Federal and State guidance endorse the use of the term dyslexia during evaluation, eligibility determinations, and IEP documents, when students meet the criteria as outlined in the most widely accepted definition of dyslexia.

Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

Massachusetts Dyslexia Guidelines, DESE 2021

Three Purposes:

1. Provide a set of **screening guidelines** for **all students**
2. Provide a **framework of intervention** for students at risk of dyslexia and other learning difficulties that is timely and responsive
3. Provide a **comprehensive resource of evidence-based practices** aimed at all educators to support students at risk of dyslexia

Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

mCLASS®



Amplify.

How mCLASS helps us align to Dyslexia Guidelines:

1. **Screening Guidelines**- Provides us with an embedded benchmark assessment schedule (September/October, January, May/June) and the appropriate assessments for each grade level. Additionally it provides progress monitoring at the teacher's discretion.
 2. **Framework of Intervention**- Instantaneously provides students' results and their scores classification (above, benchmark, below, or well below) within a MTSS.
-

(1) Provide a set of **screening guidelines** for **all students**

- At Valley, screening was implemented in our K-6 programs to prevent the “wait to fail” model
- Comprehension screening continues in our 6-12 programs due to the heterogeneous nature of our students’ districts
- Why is screening early so important?
 - Research in multiple fields resulted in a solid body of evidence that students can reliably be screened for their risk of dyslexia before receiving reading instruction.

Screening Answers Three Questions
1. Who is at risk?
2. How significant is the risk?
3. Which skill areas need support?

Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

DIBELS	BOY	MOY	EOY
Composite Score 	<div>321</div> <div>Below</div>	<div>381</div> <div>Below</div>	<div>—</div> <div>—</div>
Reading Fluency ORF	<div>76</div> <div>Below</div>	<div>101</div> <div>Below</div>	
Reading Accuracy ORF-Accu	<div>96</div> <div>Benchmark</div>	<div>98</div> <div>Benchmark</div>	
Basic Comprehension Maze	<div>9</div> <div>Well Below</div>	<div>6.5</div> <div>Well Below</div>	

Grade 4 student

(1) Provide a set of **screening guidelines** for **all students**

- What are general guidelines for screening protocol? Timeframes and other considerations?
 - Universally screen students multiple times annually
 - Screening occurs as early in the year as possible, but within three months for K students (to prevent over identification).
 - Consider screening exemptions (cognitive and physical impairments)
 - Screening measures should be brief, valid, reliable, and norm- or criterion-referenced
 - Utilize evidence based tools and not individual tools created at the district level
 - Establish a screening team of practitioners who hold various roles within the school and district (educators, specialists, administrators, support staff).
- What skills are we screening from K-2?
 - Kindergarten: Fall and Spring → Phonemic Awareness, Alphabetic Knowledge, Rapid Automatized Naming (RAN)
 - First Grade: Fall, Winter, Spring → Phonemic Awareness, Alphabetic Knowledge, Word Reading, Passage Reading Fluency, RAN
 - Second Grade: Fall, Winter, Spring → Alphabetic Knowledge, Word Reading, Reading Comprehension, RAN

Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

Valley Collaborative Special Education Directors Meeting - Literacy Presentation

DIBELS	BOY	MOY	EOY
Composite Score 	 Paused	 Benchmark	 —
Letter Sounds NWF-CLS	91 Above	48 Well Below	
Decoding NWF-WRC	19 Benchmark	10 Well Below	
Word Reading WRF	54 Above	66 Above	
Reading Fluency ORF	82 Benchmark	104 Benchmark	
Reading Accuracy ORF-Accu	92 Benchmark	100 Benchmark	
Basic Comprehension Maze	—	19 Above	

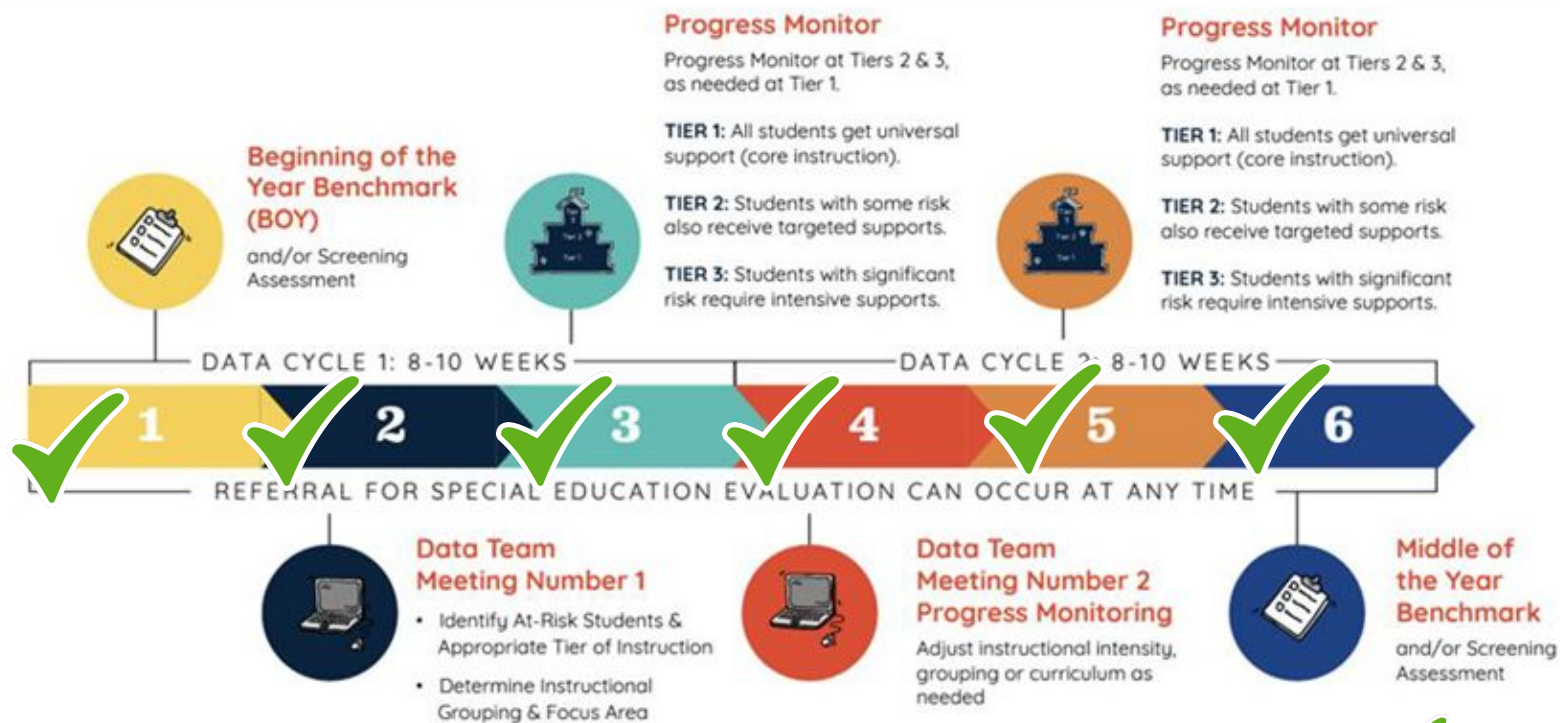
Grade 2 student

(2) Provide a **framework of intervention** for students at risk of dyslexia and other learning difficulties that is timely and responsive

- DESE recommends a Multi-Tiered System of Support for identifying and supporting students at risk for Dyslexia.
- How can mCLASS enhance Data Team Meetings?
- How does mCLASS support Tier 2 and Tier 3 intervention?
- What is the importance of collecting progress monitoring data and conferring with team members during progress monitoring meetings?

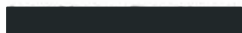
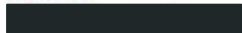
Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

Figure 1: How to Integrate Screening, Intervention and Progress Monitoring within a Multi-Tiered System of Support (MTSS) Framework: Supporting Students At-Risk for Dyslexia



Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

mCLASS

	MOY Composite  Well Below	Skill	MOY	Last 3 PM Scores	EOY Goal	Goal Set	Aimline to Goal Set	Las Asses
Grade 5 	MOY Composite	Skill	MOY	Last 3 PM Scores	EOY Goal	Goal Set	Aimline to Goal Set	Las Asses
	281  Well Below	Letter Sounds NWF-CLS (Gr. KG) ‡		23				01/05/
		Decoding NWF-WRC (Gr. KG) ‡		5				01/05/
		Word Reading WRF (Gr. KG) ‡		11				01/05/
								
Grade 6 	MOY Composite	Skill	MOY	Last 3 PM Scores	EOY Goal	Goal Set	Aimline to Goal Set	Las Asses

mCLASS Progress Monitoring Dashboard

X Close

Kindergarten PM Form 3

Assessment Date - 01/05/2022

Print

How to understand assessment results

Assessment: **Nonsense Word Fluency (NWF)**

Assessor: **Waters, Meghan**

Correct Letter Sounds (CLS)

Score: **23 Letter Sounds/Minute**

Words Recoded Correctly (WRC)

Score: **5 Words/Minute**

<div> <div>san</div> <div>CLS: 3/3</div> <div>WRC: 1/1</div> </div> <div> <div>/s/</div> <div>/a/</div> <div>/n/</div> </div> <div> <div></div> </div>	<div> <div>nup</div> <div>CLS: 2/3</div> <div>WRC: 0/1</div> </div> <div> <div>/n/</div> <div>/u/</div> <div>/p/</div> </div> <div> <div></div> <div></div> </div>	<div> <div>cun</div> <div>CLS: 3/3</div> <div>WRC: 1/1</div> </div> <div> <div>/k/</div> <div>/u/</div> <div>/n/</div> </div> <div> <div></div> </div>
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Student assessment summary

mCLASS supports best practices in progress monitoring.

- Instructional level
- Brief
- Formative (informs instruction)
- Specific to skills that fall in at-risk range
- Capture incremental changes in growth
- Allow groupings for students in Tiers 2 and 3
- General guidance suggests progress monitoring every 1-3 weeks
- Data points are collected into graphs of aimelines towards end of year goals
- Data informs team meetings twice per year

What is a common framework for Data Team Meetings?

- Hold data team meetings at least five times per year with attendance from the data team for each grade level
- Review benchmark data (three times per year) and review progress monitoring data (two times per year)
- Organize data team meetings by grade level (K-2)
- The goal is to make determinations in the following areas for every student:
 - The appropriate Tier(s) of instruction for every student at each grade level
 - Students who demonstrate risk for Dyslexia and score at the fifth percentile or below automatically receive Tier 1 and Tier 3 supports
 - The instructional focus area: *accuracy, automaticity/fluency, and language comprehension*
 - Student groupings with similar strengths and weaknesses
 - Considerations for support delivery: *who, what, when, where*

Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

Grade 1 Last Name, First Name	BOY Goal 330	MOY Goal 389	EOY Goal 441
[REDACTED]	340 Benchmark	383 Below	—
[REDACTED]	331 Benchmark	379 Below	—
[REDACTED]	300 Well Below	341 Well Below	—
[REDACTED]	363 Above	409 Benchmark	—

Class snapshot of composite Scores

Class grouping with instructional interventions and activities

PHONOLOGICAL AWARENESS

[Download all activities](#)

GROUP 1

Early Phonological Awareness ± 2 Students

Lucas H Kai M

Students in this group have limited phonemic awareness.

Need to work on understanding the concepts of early phonological awareness by identifying parts of spoken words in bigger parts, such as hearing that sentences are made up of words, and words are made up of syllables.

See activities ▾

What is the role of Tier 2 and Tier 3 intervention?

Targeted intervention at the Tier 2 level is designed to extend from the Tier 1 curricula and supplement, enhance, and support core instruction.

Tier 3 instruction is intended to be intensive, strategic, and specialized to address significant student weaknesses.

Tier 2 and Tier 3 receive progress monitoring and still participate in Tier 1 instruction.



Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*



█ can read connected text accurately. █ needs to work on building fluency and reading high-frequency irregular words in context and in isolation.

 **Fluency**

Observed patterns

☐ Accurate but slow ⓘ

Reading Fluency ORF

Activities

 Dissecting Words Into Roots and Suffixes (-con, -com, -ible, -able, super-, inter)

 Time Well Spent—Reading!

 Punctuation Theater

 Word Detectives

 Reading Rate and Pacing

 The Sum

A student in Tier 3 receiving intensive, strategic, and specialized instruction in specific skills.

Compound Word Clap

mCLASS®



Phonological Awareness: Segment Compound Words

The student will practice orally segmenting compound words into syllables by clapping the syllables of 2-syllable compound words.

Warm-Up



Some words are made up of smaller words. They are called compound words. We can divide them up into smaller words. Listen to me do it, and then we'll do one together. After that it will be your turn.

Let's start with the word "football." We can divide the word football into two parts. Listen to me: "foot-ball." I'll clap for each part of the word. "Foot" (clap), "ball" (clap). Put it together: "football."

OK, now this time you can do it with me.

Model for the students.



I'm thinking of the word "popcorn." Let's divide the word into parts. What's the first part? "Pop" (clap). What's the second part? "Corn" (clap). Put it together: "popcorn."

If Correct: That's right: "pop" (clap), "corn" (clap). The first part is "pop" (clap), and the second part is "corn" (clap). Let's try another one.

If Incorrect: Listen carefully. Take it apart: "pop" (clap), "corn" (clap). The first part is "pop" (clap) and the second part is "corn" (clap).

Wait for a correct response before

Example lesson from mCLASS

(3) Provide a **comprehensive resource of evidence-based practices** aimed at all educators to support students at risk of dyslexia

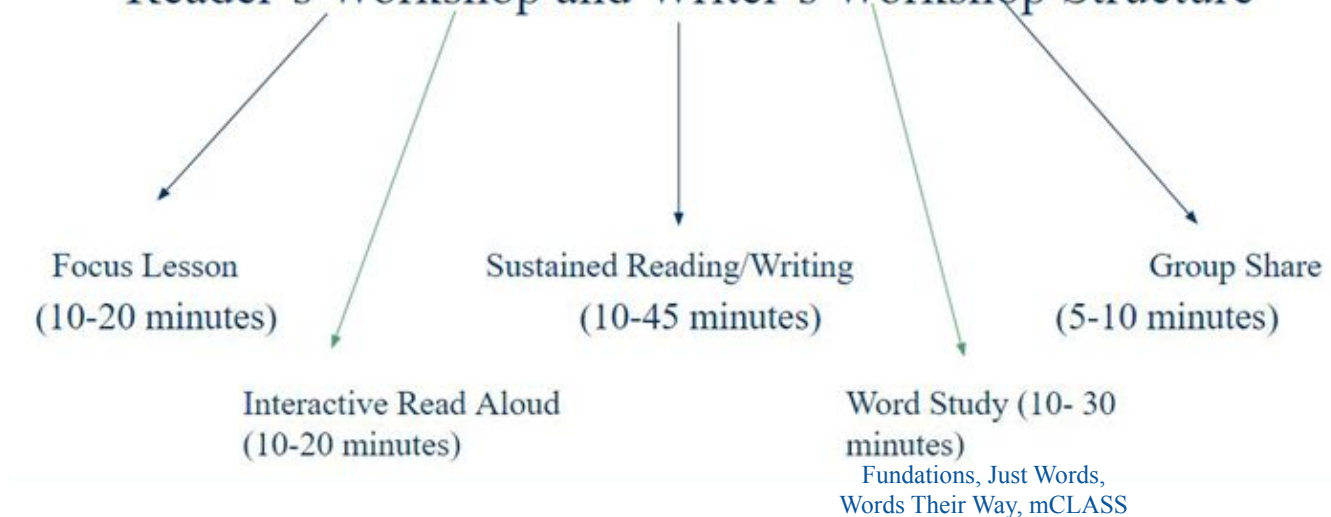
- The success of MTSS rests squarely on the effectiveness of Tier 1 instruction for all students because small-group interventions can be logistically untenable when a large proportion of students fall in the at-risk range.
- From K-2, a robust, universal evidenced-based Tier 1 ELA curriculum is critical for preventing and addressing word reading challenges.
- Based on the Massachusetts Dyslexia Guidelines, mCLASS presents limitations

Department of Elementary and Secondary Education. (2021). *Massachusetts Dyslexia Guidelines*

mCLASS is not a replacement for universal core reading instruction (Tier 1) for students at risk for Dyslexia

Balanced Literacy Framework

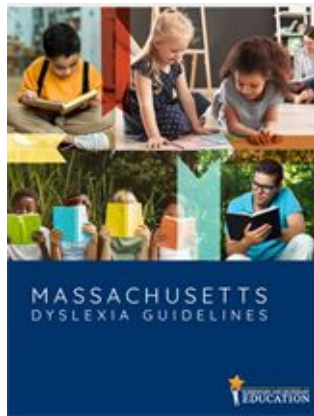
Reader's Workshop and Writer's Workshop Structure



Supplemental assessment measures may still be necessary to plan targeted intervention

Assessment	Skill Measured
CORE Phonics Inventory	Phonics
HFW Assessment	Sight Words
PAST	Phonological Awareness
WIST	Word Identification and Spelling
TOSWRF-2	Word Identification and Fluency
Reading Inventory	Comprehension
Qualitative Reading Inventory	Comprehension, Accuracy and Fluency
Fountas & Pinnell	Comprehension, Accuracy and Fluency
mCLASS (DIBELS)	Multiple batteries

The Massachusetts Dyslexia Guidelines provide a **comprehensive resource of evidence-based practices** aimed at all educators to support students at risk of dyslexia



Integrate the Dyslexia Guidelines with other DESE guidance

Finally, Senior Associate Commissioner Russell Johnston began each of the stakeholder meetings by emphasizing that the Guidelines will be consistent with other guidance from DESE. As such, the Dyslexia Guidelines have drawn upon the Early Literacy Screening Assessments, the Mass Literacy Guide, the Massachusetts multi-tiered system of support (MTSS) Blueprint, and the Blueprint for English Learner Success so that districts can confidently and consistently build upon existing evidence-based best practices.

These Dyslexia Guidelines are intended to be a living, evolving document, one that will continue to be a source of direction and support for districts, families, and especially for students with dyslexia, learning disabilities, and reading needs.



List of Approved Early Literacy Screening Assessments

English

The Department requested proposals from assessment publishers and reviewed submitted assessments according to detailed criteria. After careful review, the following literacy screening assessments were approved:¹

- Amplify mCLASS
- Curriculum Associates iReady
- EarlyBird Education
- Houghton Mifflin Harcourt Amira
- Illuminate FastBridge: the following assessments are bundled:
 - earlyReading
 - Adaptive Reading (aReading)
 - Autoreading
 - CMBreading
- Istation Indicators of Progress (ISIP)
- iSTEEP
- Lexia RAPID
- NCS Pearson aimswebPlus
- NWEA MAP Growth
- Renaissance STAR Reading (Early Literacy, Reading and CBM)
- Riverside Insights easyCBM
- University of Oregon DIBELS 8th edition**
- Voyager Sopris Learning Acadience Reading

<https://www.doe.mass.edu/instruction/screening-assessments.html>



Central Administration

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MEMORANDUM

To: Valley Collaborative Special Education Directors
From: Dr. Chris A. Scott, Executive Director
Date: January 27, 2022
Re: Tuition Rates

Valley Collaborative has made no changes to member district tuition rates and fees for the 2022-2023 school year. In an effort to streamline all non-member district tuition rates and fees to a 25% increase over member district tuition and fees, we have made a few slight changes to the current non-member district tuition rates and fees ranging from a 3.76% decrease to a 0.27% increase over the current tuition rates and a 8.7% increase to contracted and related services rates. Please see below for the detailed list of changes.

- a decrease ranging from \$.02 - \$8.75 for five non-member programs' school year tuition
 - High School - School & Vocational Training (-\$.02), Elementary School - Pragmatic, Sensory, and Behavior (-\$1.50), Middle School - Pragmatic, Sensory, and Behavior (-\$1.50), High School - School to Work Program (-\$2.75), & High School - School & Life Skills Training (-\$8.75)
- A \$1.00 increase to the per diem of two non-member programs' school year tuition
 - Intensive Special Needs & High School & Middle School – School & Life Skills Training ISN
- non-member related services rates have increased by \$10
- non-member hourly rate for tutoring increased by \$5
- non-member day rate for transitional aide increased by \$12.50
- non-member day rate for Behavioral Aide increased by \$23.50
- non-member day rate for extended day programming increased by \$2
- non-member extended evaluation hourly rate increased by \$5

In addition, we have increased the summer school per diem rate for non-member districts by \$50/day.

Attachments:

2022-2023 Valley Collaborative Tuition Rates & Fees

Valley Collaborative Special Education Directors Meeting - Valley's FY'23 Tuition Rates and Fees Update

Valley Collaborative 2022 - 2023 Tuition Rates

 Program	Grades	Member District Rates				Non-Member District Rates				
		SY & Summer Per Diem	School Year (180 Days)	Summer (30 Days)	Total Tuition (SY+Summer)	School Year Per Diem	School Year (180 Days)	Summer Per Diem	Summer (30 Days)	Total Tuition (SY+Summer)
Intensive Special Needs (ISN) Member and Non-Member Tuition Includes: SLP, OT, PT, BCBA, SW	K – Age 22	\$294.00	\$52,920	\$8,820	\$61,740	\$367.50	\$66,150	\$418	\$12,525	\$78,675
Elementary School - Emotional Behavioral Member and Non-Member Tuition Includes: SLP, OT, PT, BCBA, SW	K-6	\$240.00	\$43,200	\$7,200	\$50,400	\$300.00	\$54,000	\$350	\$10,500	\$64,500
Elementary School - Pragmatic, Sensory, and Behavior Member and Non-Member Tuition Includes: SLP, OT, PT, BCBA, SW	K-6	\$240.00	\$43,200	\$7,200	\$50,400	\$300.00	\$54,000	\$350	\$10,500	\$64,500
Middle School - Emotional Behavioral Member and Non-Member Tuition Includes: SLP, OT, PT, BCBA, SW	6-8	\$240.00	\$43,200	\$7,200	\$50,400	\$300.00	\$54,000	\$350	\$10,500	\$64,500
Middle School - Pragmatic, Sensory, and Behavior Member and Non-Member Tuition Includes: SLP, OT, PT, BCBA, SW	6-8	\$240.00	\$43,200	\$7,200	\$50,400	\$300.00	\$54,000	\$350	\$10,500	\$64,500
High School & Middle School - School & Life Skills Training ISN Member and Non-Member Tuition Includes: SLP, OT, PT, BCBA, SW	6- Age 22	\$294.00	\$52,920	\$8,820	\$61,740	\$367.50	\$66,150	\$418	\$12,525	\$78,675
High School - School & Vocational Training Member District Tuition Includes: SLP, OT, PT, BCBA, SW Non-Member District Tuition Includes: BCBA, SW	9 – Age 22	\$179.00	\$32,220	\$5,370	\$37,590	\$223.75	\$40,275	\$274	\$8,213	\$48,488
High School - School & Life Skills Training Member District Tuition Includes: SLP, OT, PT, BCBA, SW Non-Member District Tuition Includes: BCBA, SW	9 – Age 22	\$179.00	\$32,220	\$5,370	\$37,590	\$223.75	\$40,275	\$274	\$8,213	\$48,488
High School - School to Work Program Member District Tuition Includes: SLP, OT, PT, BCBA, SW Non-Member District Tuition Includes: BCBA, SW	9 – Age 22	\$179.00	\$32,220	\$5,370	\$37,590	\$223.75	\$40,275	\$274	\$8,213	\$48,488
High School - Alternative Program Member District Tuition Includes: SLP, OT, PT, BCBA, SW Non-Member District Tuition Includes: BCBA, SW	9-12	\$210.00	\$37,800	\$6,300	\$44,100	\$262.50	\$47,250	\$313	\$9,375	\$56,625
High School - Alternative Vocational Program Member District Tuition Includes: SLP, OT, PT, BCBA, SW Non-Member District Tuition Includes: BCBA, SW	9-12	\$210.00	\$37,800	\$6,300	\$44,100	\$262.50	\$47,250	\$313	\$9,375	\$56,625

Valley Collaborative 2021 -2022 Contract & Related Services Rates

Hourly Services	Member District	Non-Member District
Speech, Occupational, and Physical Therapy	\$100/hr.	\$125/hr.
Board Certified Behavior Analyst	\$100/hr.	\$125/hr.
Social Work	\$100/hr.	\$125/hr.
Reading Specialist	\$100/hr.	\$125/hr.
Transition Specialist	\$100/hr.	\$125/hr.
Cognitive/Intelligence Testing – Three Year Evaluations	\$100/hr.	\$125/hr.
Tutoring	\$50/hr.	\$62.50/hr.
Transitional Aide	\$125/day	\$156.25/day
Behavioral Aide	\$235/day	\$293.75/day
Nurse	Contingent on qualifications	Contingent on qualifications
Extended Day Programming	\$20/day (1:5 ratio)	\$25/day (1:5 ratio)
Interim Alternative Education Setting – Extended Evaluation	program tuition day rate + 50/hr. related services	program tuition day rate + \$62.50/hr. related services
Initial/Reevaluation/ 3 year Evaluations	N/A	billed at the hourly rate for the appropriate service

Valley Collaborative Special Education Directors Meeting - Valley's FY'22 Update

Valley Collaborative
Interim Statement of Revenues, Expenses and Changes in Net Assets
For the Period Ending November 30, 2021
83 of 210 (39.5%) School Days

UNAUDITED			
	AMENDED BUDGET	ACTUAL	
REVENUES			
Services	\$ 16,250,000	\$ 6,023,092	
State Contracts	3,050,000	1,522,983	
Other	925,000	219,041	
Interest	1,000	489	
Total Revenues	20,226,000	7,765,605	38.39%
EXPENSES			
Salaries	13,381,932	5,415,525	
Employee Benefits	2,484,635	912,761	
Operating Expenses	1,907,900	764,664	
Leases & Rentals	514,609	205,609	
Depreciation	751,000	-	
Total Expenses	19,040,076	7,298,559	38.3%
Change in Net Assets - Operating	\$ 1,185,924	\$ 467,046	
Non Operating Activities			
Return to Member Districts	-		
Non-Operating Expenses (1)	(899,000)	(315,049)	
Change in Net Assets	\$ 286,924	\$ 151,997	

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

Valley Collaborative Special Education Directors Meeting - 2022-2023 Academic Calendar



2022 - 2023 Academic Calendar

Valley Elementary School,
Valley Middle School, and
Valley Transitional High School

July 2022						
Su	Mo	Tu	We	Th	Fr	Sa
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3	4	5	6	7	8	9
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17	18	19	20	21	22	23
24/31	25	26	27	28	29	30

August 2022						
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September 2022						
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October 2022						
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November 2022						
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December 2022						
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January 2023						
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February 2023						
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March 2023						
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April 2023						
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May 2023						
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June 2023						
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	First/Last Day of Summer Program
	*Professional Development Day All Staff - No School for Students
	No School/Holiday/School Vacation
	Professional Development Day for Licensed Staff - No School for Students

	First/Last Day of School Year (5 snow days used)
	Early Release - Professional Development for staff (specific number of PD days will vary by position)
	Board of Directors Meeting (Regular School Day for Staff and Students)
	Early Release



2022 - 2023 Special Education Directors Meeting Calendar

July 2022						
Su	Mo	Tu	We	Th	Fr	Sa
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August 2022						
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September 2022						
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October 2022						
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November 2022						
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December 2022						
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January 2023						
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February 2023						
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March 2023						
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April 2023						
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May 2023						
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June 2023						
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25	26	27	28	29	30	

Meetings will begin at 12:00 noon



Central Administration

25 Linnell Circle, Billerica MA 01821 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Special Education Directors
From: Dr. Chris A. Scott, Executive Director
Date: January 27, 2022
Re: Programmatic Updates

The following communications are attached for your review:

- Valley Program Updates

Attachments:

Elementary School Update

Alternative Programming Middle School and Transitional High School Update

Transitional Programming Middle School and Transitional High School Update



Central Administration

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MEMORANDUM

To: Valley Collaborative Special Education Directors
From: Dr. Chris A. Scott, Executive Director
Date: January 27, 2022
Re: Monthly Update from
Heather Mackay, Principal Elementary School

The transition back from December break is bringing some exciting events for our students. The Elementary School will be celebrating Random Acts of Kindness Week starting on the 18th. Staff have planned activities for students to engage in different random acts that promote kindness and positivity throughout the school. This event is always a favorite year after year as it brings our community closer and shows the amazing culture at the Elementary School.

Our students have also worked together to earn an Ice Cream Social that will be taking place next Thursday. The students earned this by wearing their masks around school and receiving pom poms when spotted in the building. They have put their pom poms together and filled up a bucket! Now that the bucket is full- they have reached their goal! There will be a traveling ice cream cart at the end of next week to reward the students.

The school itself has had a bit of a facelift in the past few weeks. The maintenance team has worked hard in giving our interior doors a fresh coat of Valley navy blue paint throughout the hallways. There have been carpets replaced and our chill-ville space is coming together.

We are looking forward to a school wide trip to Roller Kingdom on January 25th. Students will have the opportunity to use their skating skills they have been working on while getting out of the building for some fun!

We are continuing to tour new students from a number of districts that include Westford, North Middlesex, Tewksbury, Dover, Clinton and Methuen. Our current enrollment is 78 students at the Elementary School.

Thank you for the continued support.



Central Administration

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MEMORANDUM

To: Valley Collaborative Special Education Directors
From: Dr. Chris A. Scott, Executive Director
Date: January 27, 2022
Re: Monthly Update from
Julie Fielding, Principal Alternative Programming Middle School and Transitional High School

It's been busy since returning back from the much needed winter break. Quarter 2 midterms ended right before the break and midterms were sent out. We have a lot of IEP meetings and 3 year evaluations happening.

We continue to make changes, as needed, to programming to support the current students enrolled and future students.

In the fall students had been back to attending regular field trips, those have been put on hold for January and February. We are currently only doing outdoor field trips-weather permitting.

In November the Site 2 high school students completed a walkathon fundraiser and bake sale for St. Jude's and raised \$1,338.24.

For Thanksgiving the Alternative Admin cooked breakfast for the staff and students while students and staff participated in fun thankful themed activities.

In December students participated in our annual gingerbread house competition along with other various holiday activities.

In the last month we received 20 referrals (with many from previous months still pending). We are trying to get tours set up as quickly as we can. Covid and CPR has slowed us down though.

We are looking forward to the "surge" ending.



Central Administration

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MEMORANDUM

To: Valley Collaborative Special Education Directors
From: Dr. Chris A. Scott, Executive Director
Date: January 27, 2022
Re: Monthly Update from
Nicole Noska, Principal Transitional Programming Middle School and Transitional High School

The extracurricular clubs at the Transitional High School have been focused on charitable initiatives this school year. In early November, the student council collected 35 pounds of Halloween candy for the Soldier's Angels Treats for Troops program. Student Council members took on different roles to make the candy drive a success; from communications and advertising to boxing and delivering the candy, student council facilitated the entire process.

In December, the Student Council held two charitable drives during the holiday season. First, the student council collected non-perishable food for the Merrimack Valley Food Bank (MVFB). All totaled, Valley Collaborative donated 122 pounds of food. Deb Callery, the Assistant Executive Director of the MVFB thanked the students for their donations writing to the Student Council President, "Thank you so much to you and your fellow students! We love when people reach out to help us feed our neighbors!"

The second drive benefitted Toys for Tots. Students collected new and unwrapped toys and delivered them to a local registered donation site. Thanks to the generosity of students, families, and staff we were able to provide more than 20 children with a new toy to open on Christmas.

Students in the Transitional Programs closed off the year with a trip to the North Shore Music Theater to see a production of A Christmas Carol. Many students opted to dress up for the event in their holiday finest. They were dazzled by the special effects, singing and dancing. The annual field trip was put on hold last year due to Covid restrictions. We were excited to bring back this New England holiday tradition this year for students to safely enjoy.



Central Administration

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MEMORANDUM

To: Valley Collaborative Special Education Directors
From: Dr. Chris A. Scott, Executive Director
Jessica Scalzi, Lead Nurse
Date: January 27, 2022
Re: COVID-19 Update

Positive COVID cases since September 2021: 95

Positive cases from 12/23/22 to 1/11/22

Elementary: 15

Middle: 5

High: 24

Adult Program: 6

Valley Collaborative has hosted 4 COVID vaccine clinics. This has allowed over 150 adults and children to receive their COVID-19 vaccines and boosters. These clinics were held on December 15th, December 20th, January 5th and January 10th. We are awaiting dates from the state to hold additional vaccine clinics.

All COVID-19 protocols are in line with DESE, DPH and CDC.

From: [Christopher Malone](#)
To: [Chris Scott](#)
Cc: [Tim Piwowar](#)
Subject: [EXTERNAL] Thank you
Date: Thursday, January 13, 2022 3:38:25 PM

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

Hi Chris,
First, thank you for your work and your leadership at Valley, it has been truly my pleasure to serve with you and I will miss our interaction.
Second, thank you so much for the surprise retirement recognition, it was very thoughtful and unexpected. The look on the poor Valley guy when he had to deliver balloons and a cake (very nice clock too!) to me was priceless! Thank you so much!
Sincerely,
Chris

Questions? Need Interpretation? Click Here: [Parent Portal](#)

¿Preguntas? ¿Necesita interpretación? Haga clic aquí: [Parent Portal](#)

Perguntas? Precisa de interpretação? Clique aqui: [Parent Portal](#)

أسئلة؟ بحاجة الى ترجمة فورية؟ اضغط هنا [Parent Portal](#)

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**Valley Collaborative
FY 22 Board Member Appointment**

Brenda Theriault-Regan was appointed to the Valley Collaborative Board of Directors
(Board Member Name)

on April 13, 2022 by the Tewksbury School Committee for the term March 1, 2022 –
(date of appointment) (School Committee)

June 30, 2022.

Respectfully Submitted,

Bridget Garabedian.
Tewksbury School Committee Chairperson

MASSACHUSETTS DEPARTMENT OF
ELEMENTARY AND SECONDARY
EDUCATION

CERTIFICATE OF COMPLETION

Collaborative Board Member Training

This certifies that Brenda Theriault-Regan completed the online course entitled 'An Overview of Requirements for Educational Collaborative Board Members', as required by M.G.L. c. 40 § 4E(c) and 603 CMR 50.00, on 4/24/2022

Center for Educational Options, Education Collaborative Team
Massachusetts Department of Elementary and Secondary Education



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: April 28, 2022
Re: Valley Collaborative Transitional High School Graduation

Due to the pandemic, we were unsure if we would be able to have our graduation at the Billerica Elks as in previous years. I am pleased to inform you, this year the Valley Collaborative Transitional High School Graduation will take place at 11:30 a.m. on Friday, June 10, 2022 at the Billerica Elks. Families and staff will be in attendance at the graduation.

This will also be an early release day for the Middle and High School students at Valley Collaborative in Billerica.

We hope to see you there.



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Todd Fletcher, Guidance Counselor, Alternative High School
Date: April 28, 2022
Re: Valley Collaborative Basketball Team

The 2021-2022 Valley Collaborative basketball season was a true example of the old saying “it’s not how you start, it’s how you finish”. At the start of the season the excitement was through the roof because we were going to be able to compete against other schools. Last year, due to COVID, the program was limited and we could only have matchups against each other.

About halfway through the season the focus of the program shifted toward the GBBL (Greater Boston Basketball League) Tournament at the end of the season. If we stuck together, improved as a team, and made it to the tournament, it would all be worth it. As that tournament approached, the team began to gel. The roster was firmed up and the intensity of practices and games was increasing.

As the team was still hunting for its first win, there were a couple of really close games that we weren’t able to win, however the confidence gained from them was obvious. That confidence was on full display at the GBBL Tournament from the minute the team walked onto the campus at UMASS Lowell. The competitive spirit and teamwork that Valley displayed was incredible. The team came out on fire and won two games on the first day propelling them into the Championship the following day. Confidence was sky high when the team returned to the school. The players were so proud of their accomplishment however there was one more game to take care of. There was a buzz at school as the other students and staff rallied around the team.

The morning of the championship there was one more unexpected hurdle. One of the team’s leaders and top scorers was unable to make it to school. Instead of panicking, the team talked about the importance of coming together and each elevating their game. The Championship game felt like a Championship should. The gym was packed and it just felt like a huge game. Valley got out to a hot start and took a 5 point lead into halftime. The other team was not going out easy however as they roared back in the second half to take the lead by 5 points. This type of situation can make or break a team. The leaders of the team stepped up and were determined to take the game back. The final few minutes were what sports are all about. Back and forth, big shot after big shot, teammates cheering each other on. At the end of regulation the game was tied and headed for overtime. Valley stepped up once again in the overtime period and after a huge 3 point shot, they were CHAMPIONS.

The way this season ended could not have been scripted together. Lessons were learned throughout the year. Finish what you start. Believe in your team. Hard work will pay off. These kids were so proud, and took from the tournament a confidence that cannot be gained in any other environment. Walking back into school to ovations from everyone with the Championship trophy is a memory this team will never forget.

Required Action:

None

Attachments:

None



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: March 23, 2022
Re: Valley Collaborative FY'23 Reorganization

In an attempt to streamline and improve general operations of the Collaborative, the following positions have been added, eliminated, and/or relocated on the FY'23 Organizational Chart.

The Assistant Business Manager role has been vacant for 2 years and was recently filled (see job description attached). The business office functions that were previously associated with the Director of Adult and Transitional Services position have been transferred to the Assistant Business Manager position as well as to James George, Business Manager/Town Accountant.

The Direct of Adult & Transitional Services position has been eliminated. The business office functions associated with this role have been reassigned to James George, Business Manager/Town Accountant and to the Assistant Business Manager position. In the recent past, Valley's three Principals and the programmatic lead of Adult Services reported directly to the Executive Director. With this reorganization, the programmatic lead, Matt Gentile, Adult Services Program Manager, will again report to the Executive Director.

Beginning in September and concluding in March, a full analysis of Valley Collaborative's Adult Service Program was completed, which included an audit of all of its administrative job descriptions on both the programmatic side and in the business office. As a result of this thorough and thoughtful process, the FY'23 Organizational Chart has been restructured.

The Custodial Manager position has been eliminated and the roles and responsibilities of this position have been folded into the Administrative Coordinator position at the high school. The Administrative Coordinator position originally included school level business office functions that supports tuition driven programming. This role has now been expanded to include district wide administrative responsibilities overseeing the facilities and operations department.

The Therapy Department and Curriculum Leads have been moved to be included under each program's Principal.

Also, the Elementary Special Education Director role is being eliminated and replaced with a Vice Principal position.

Required Action:

- None

Attachments:

- Assistant Business Manager Job Description
- FY'23 Organizational Chart



Central Administration

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Assistant Business Manager

Location: 25 Linnell Circle, Billerica

Reporting to: Business Manager/Accountant

Salary Range: \$70,000 - \$105,000

Terms: 260 days; 5 days/week; 8 hours/day (Negotiable)

Valley Collaborative is a Massachusetts Department of Elementary and Secondary Education approved public school entity. Valley also provides Social Security Administration (SSA), Massachusetts Department of Developmental Services (DDS), Massachusetts Commission for the Blind (MCB) and Massachusetts Rehabilitation Commission (MRC) programs for Individuals over the age of 18 with special needs. Valley provides a robust pathway for students to continue their careers beyond high school by providing high quality academic, therapeutic, and vocational services to individuals referred by both local school districts and SSA, DDS, MCB and MRC. We provide programming so Students and Individuals with special needs can reach their educational and/or occupational goals. By sharing its resources with multiple school districts and social service agencies, Valley programs are able to maintain superior quality at reasonable costs to all those it serves while meeting or exceeding state standards.

Overview:

Under the direction of the Business Manager/Accountant, the Assistant Business Manager is responsible for a wide variety of contracting, billing, and business office activities which support Valley Collaborative's diverse and dynamic educational, vocational and transitional programming. This position will utilize Valley Collaborative's billing systems to accurately report and fulfill contracting responsibilities with the Social Security Administration (SSA), Massachusetts Department of Developmental Services (DDS), Massachusetts Commission for the Blind (MCB), Massachusetts Rehabilitation Commission (MRC), in addition to the Department of Elementary and Secondary Education (DESE).

Qualifications:

- Minimum education: undergraduate degree; Accounting, Finance, Business focus preferred
- Experience with DESE and Adult Service programs funded through DDS, MRC, and tuitions preferred
- 5 years experience working in a business office role preferred
- Excellent verbal and written communication skills with exceptional attention to details
- Mastery of Microsoft Office platforms (Excel) and Google

Overall Responsibilities:

- Create and maintain systems for submitting and tracking billing for the Students enrolled in Department of Elementary and Secondary Education programs at Valley Collaborative.
 - Perform tuition billing process from billing system and send to districts.
 - Generate student contracts from billing system and send to districts.
 - Generate contract services contracts from billing system and send bills for these services.



Central Administration

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- ☐ Maintain electronic filing of all student contracts and follow up with date completed/signed.
 - ☐ Print Manual Payroll Check(s) for students and staff.
 - ☐ Enter and process Accounts Payable Invoices
- Create and maintain systems for submitting and tracking billing for the Adult Programs
 - ☐ Generate State billing files based on adult clients' schedules
 - Reconcile T&T Attendance and TCP
 - Export reports from TCP for billing data entry
 - Maintain the DDS Day Services file
 - Track monthly service hours
 - Enter billing data into adult billing systems, including EIM/ESM
 - ☐ Generate payroll files for adult clients
 - ☐ Generate and track small business invoices
- Prepare, maintain, and utilize all state contracts for the Adult Services Department including rosters and budgets
 - ☐ Track Individual Utilization
 - ☐ Generate and submit Individual Utilization changes forms
 - ☐ Create, maintain, and update adult clients' rosters
 - ☐ Submit, track and troubleshoot state invoices (EIM/ESM to VendorWeb)
 - ☐ Generate IVEE invoices for paid State invoices (from VendorWeb to IVEE)
 - ☐ Submit State Service Summary forms (bi-annually)
 - ☐ Generate contracts and narratives for MRC North and SES
 - ☐ Maintain workbooks for MRC North and SES
 - ☐ Prepare and submit Annual MRC contracts Statements of Work
 - ☐ Track enrollments and terminations in Enterprise Invoice Mgmt. /Enterprise Service Mgmt. (EIM/ESM) and communicate with agency staff when corrections are needed.
- Analyze service delivery and billing data to prepare reports, evaluate service models and make recommendations for financial sustainability
 - ☐ Support the negotiation of state contract amendments
 - ☐ Present quarterly reports to Executive Director
- Generate and maintain revenue and expenses information in IVEE
 - ☐ Requisitions
 - ☐ Expenses
 - ☐ Payroll (clients, students, and staff)
 - ☐ Track expenses and revenue



Central Administration

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- Perform DESE State Reporting responsibilities
- Maintain district level Google systems
- Issue Adult Service contracts with small businesses
- Prepare financial data for audits
- Communicate with Collaborative staff to receive and convey information pertaining to the mutual impact of programming and business components
- Research and develop new contracting opportunities using COMMBUYS
- Maintain registrations with a variety of federal systems
- Review and process master service agreements (MSA's) and amendments for all state agency contracts.
- Maintain a high degree of confidentiality.
- Must remain flexible and adaptable in order to meet department needs.
- Personal qualities of integrity, credibility, and leadership.
- A strong commitment to the goals, mission, and philosophy of the organization.
- Other tasks as assigned

Physical Demands:

- Constant standing or walking.
- Requires ability to lift up to 50 pounds.
- Bends, reaches, lifts, carries, twists, pushes, pulls, and handles equipment when performing duties.

Other Competencies (skills, abilities, behavior):

Ability to understand and follow both written and oral instructions. Adaptability to perform routine, repetitive tasks within a specific period of time. Prioritizes work assignments to be completed within time requirements.

Must demonstrate a positive and caring attitude toward students, clients, and staff. Must remain flexible and adaptable in order to meet department needs.

Benefits:

- 12 sick, 2 personal days;
- State retirement;
- 403B;
- Tuition assistance;
- Health and dental insurance;
- Life/ADD insurance.

Due to the high volume of response, please do not call to confirm receipt of your resume.

Valley Collaborative is an Equal Opportunity Employer.



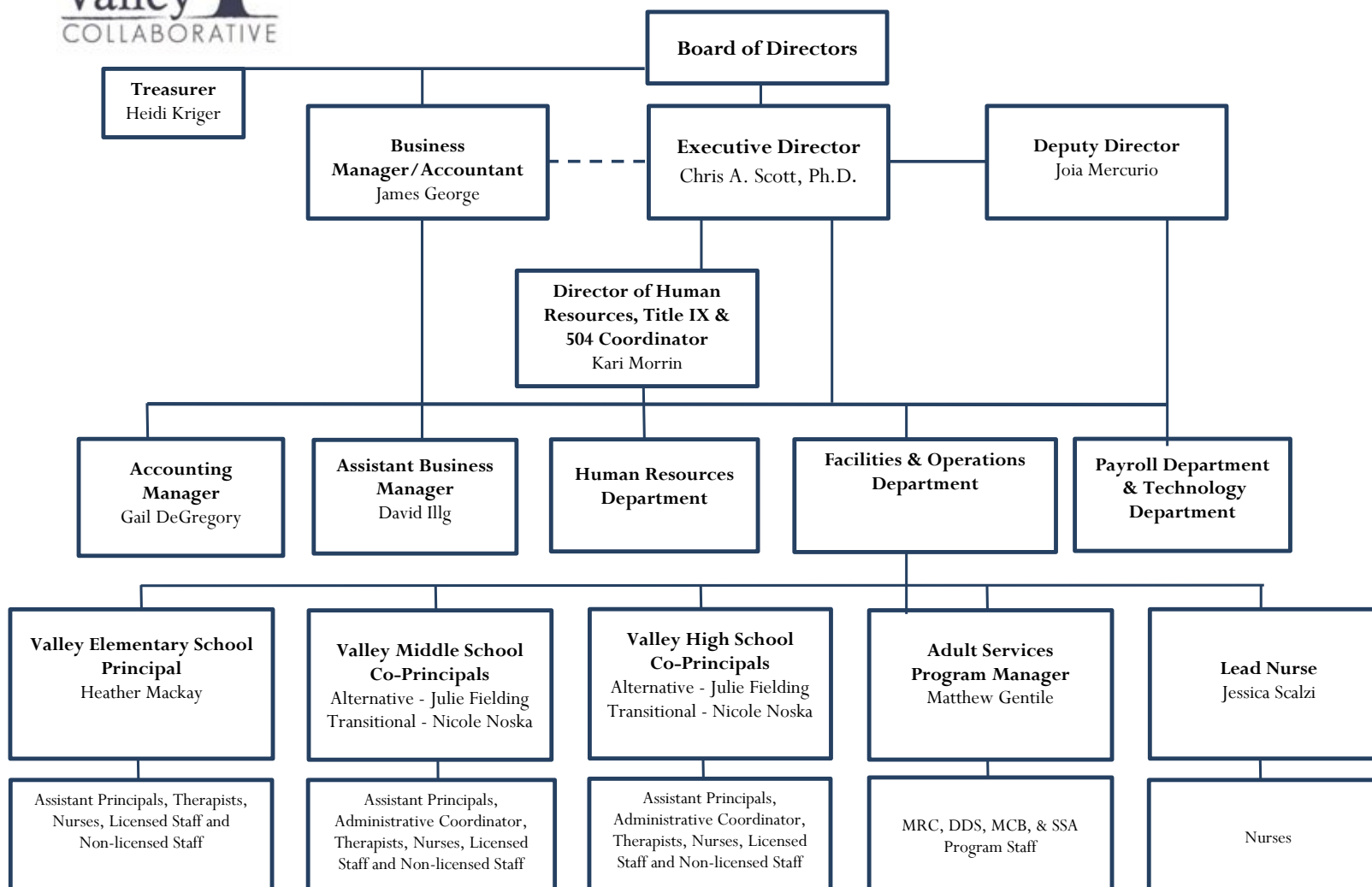
Central Administration

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Valley Collaborative Programs are committed to maintaining a work and learning environment free from discrimination on the basis of race, color, religion, national origin, pregnancy, gender identity, sexual orientation, marital/civil union status, ancestry, place of birth, age, citizenship status, veteran status, political affiliation, genetic information or disability, as defined and required by state and federal laws. Additionally, we prohibit retaliation against individuals who oppose such discrimination and harassment or who participate in an equal opportunity investigation.



FY'23 Organizational Chart





We are: A team

■ Page 2: Valley Elementary has a new football club, just one of many fun offerings.



We are: Finishing strong

■ Page 3: Valley's basketball team finished the 2021-2022 season in true championship style.



We are: Giving back

■ Page 5: Lucas Flores once attended Valley as a student. He recently returned as an employee. "I wanted to help somebody else the way that Valley helped me."

VALLEY COLLABORATIVE

Volume 10, Issue 3 News for the extended Valley Collaborative community Spring 2022

Valley Earns Top Marks

Dear Valley Community:

I am pleased to report that Valley has concluded its Coordinated Program Review with the Department of Elementary and Secondary Education (DESE), which began in March 2021 and included parent surveys, three days of onsite review and 24 staff interviews. We were informed by Christine Romancewicz, DESE's Specialized Program Liaison, during our exit interview that from her perspective Valley has achieved an "A+" and will be receiving a final report with no findings. Below are the recurring themes mentioned by Ms. Romancewicz during Valley's exit interview.



VALLEY COLLABORATIVE EXECUTIVE DIRECTOR, DR. CHRIS A. SCOTT

- DESE Parent survey results indicated that families were extremely pleased with their child's placement at Valley, quoting "they have found their home", "acceptance," "sense of safety," etc.
- Staff were very positive and appreciate the administrative support they receive in doing what is best for students.
- Staff were very committed to the mission and vision of Valley.
- From the paraprofessional in the classroom to the Executive Director and everyone in between, there was a consistent message regarding Valley's procedures and professional responsibilities and commitment to the students we educate.
- Rigorous academic curriculum across all programs was observed.
- A supportive culture for both students and staff across all programs was observed.
- Therapists, educators, and administrators worked on effective teams to deliver high quality therapeutic services and academics unique to each student at Valley.
- Procedural consistency across all programs was noted.
- Well trained staff across all programs was observed.
- Solid systems in place across all programs to ensure compliance with all state regulations.

*continued on page 7

VALLEY COLLABORATIVE

Valley Elementary Comes Alive

It's springtime at Valley Elementary and that means springing into action. From roller skating to "Light and Color" STEM workshops to a Bubble Mania show, there is never a dull amount these days. Here's a look at some recent activities that elementary students have been involved in.

Rock and roll

What do you call a school on wheels? That would be the Valley Roller Kingdom" adventure day. The entire elementary school headed to the Tyngsboro roller rink, strapped on skates and enjoyed a fun-filled day of skating. Students and staff had a great time. While the skates are now off, the school hasn't stopped moving since!

In February, Crocodile River Music came to Valley for an African music performance. The large African band put on a show, taught students about African instruments, and gave students an opportunity to try some of them out. Then it was time for students to dance with the performers. Speaking of dancing, the annual Valley Valentine's Day dance party was back this year.

Making magic

March featured that magic Valley combination of learning and fun. As part of the Read Across America, Valley hosted a Dr. Seuss Magic Show. Later that month, outreach instructors from the Acton Discovery Center came to VCES and ran a day of "Light and Color" STEM workshops for students. It seems like almost every day some kind of learning adventure is on the schedule for Valley students.

Getting outside

As the weather gets nicer, students and staff are looking forward to getting outside, including going out for group hikes. Valley also has some brand new football and dance clubs that will get students moving and bring a renewed

RIGHT: AUBREY BORGET AT AN ALL SCHOOL FIELD TRIP TO ROLLER KINGDOM. BELOW: AN OUTREACH INSTRUCTOR FROM THE ACTON DISCOVERY CENTER LEADS A "LIGHT AND COLOR" STEM WORKSHOP.



sense of community and social interaction to the school.

The football club was created by third grader Jack Bucknam and fifth grader Michael Santiago. The idea for the club started earlier this year when Michael brought a football to school. The boys started throwing around the idea of a football club and quickly found some fans of the idea: 3rd grader Jeremiah Alerte and fourth grader Keegan Gilman.

When the group announced the first game of the season, half of the school participated. Since then the games have become a weekly affair. Each week the students put up flyers encouraging their classmates to join them outside for a little football. All are welcome. Boys, girls, doesn't matter what size. We're very friendly," says Keegan.

While there's a bit of a rivalry among the club leaders as to who is the best player—Michael has gloves, Jeremiah can throw—a shared love of football unites the group. "We all like the Patriots," says Jack. Well,



not everybody. "I like the Rams," says Michael.

Dance with Somebody

The new football club is just one of many clubs at Valley Elementary. But when sixth grader Jack Murphy looked around, he noticed one that was missing: a dance club. Thanks to Jack, Valley has a brand new club devoted to getting kids moving. In April, the club will host its first outdoor dance party. "The concept is for everyone to gather in the field," says Jack. "We'll do some stretches to kick things off and then start dancing." As for the music, an essential ingredient for any dance party, Jack says he likes all kinds: country, rock and roll, jazz. With music therapist Bryan Thomas spinning the tunes, you can be sure that Valley faves "Thunderstruck" and "Dance with Somebody" will make the cut.

Jack is currently spreading the word about the event, looking for students who love to dance as much as he does. He shouldn't have trouble finding kids who like to move. The dance party is scheduled to begin as soon as the Friday football game wraps up. ■

VALLEY COLLABORATIVE

Alternative Middle/High School: A Championship Season

The 2021-2022 basketball season was a true example of the old saying “it’s not how you start, it’s how you finish”. At the start of the season, the excitement was through the roof because we were going to be able to compete against other schools. Last year, due to COVID, the program was limited and we could only have matchups against each other.

We learned quickly early on that we weren’t in the clear just yet as COVID popped up a few times and led to other teams canceling games. Between the cancellations and being on the wrong end of a few tough losses, things weren’t going exactly the way we hoped. The roster was fluid throughout the season with the addition of new students and other students missing some time.

About halfway through the season the focus of the program shifted toward the Greater Boston Basketball League (GBBL) Tournament at the end of the season. If we stuck together, improved as a team, and made it to the tournament, it would all be worth it. As that tournament approached, the team began to gel. The roster was firmed up and the intensity of practices and games was increasing.

As the team was still hunting for its first win, there were a couple of really close games that we weren’t able to win, however the confidence gained from them was obvious. That confidence was on full display at the GBBL Tournament from the minute the team walked onto campus at UMASS Lowell. The competitive spirit and teamwork that Valley displayed was incredible. The team came out on fire and won two games on the first day, propelling them into the Championship the following



PLAYERS ON VALLEY’S ALTERNATIVE MIDDLE AND HIGH SCHOOL BASKETBALL TEAM GOT OFF TO A SLOW START BUT FINISHED THE 2021-2022 SEASON IN CHAMPIONSHIP STYLE.

day. Confidence was sky high when the team returned to the school. The players were so proud of their accomplishment however there was one more game to take care of. There was a buzz at school as the other students and staff rallied around the team.

The morning of the championship there was one more unexpected hurdle. One of the team’s leaders and top scorers was unable to make it to school. Instead of panicking, the team talked about the importance of coming together and each elevating their game. The Championship game felt like a Championship should. The gym was packed and it just felt like a huge game. Valley got out to a hot start and took a 5 point lead into halftime. The other team was not going out easy however as they roared back in the second half to take the lead by 5 points. This type of situation can make or break a team. The leaders of the team stepped up and were determined to take the game

back.

The final few minutes were what sports are all about. Back and forth, big shot after big shot, teammates cheering each other on. At the end of regulation the game was tied and headed for overtime. Valley stepped up once again in the overtime period and after a huge 3 point shot, they were CHAMPIONS.

The way this season ended could not have been scripted together. Lessons were learned throughout the year. *Finish what you start. Believe in your team. Hard work will pay off.* These kids were so proud, and took from the tournament a confidence that cannot be gained in any other environment.

Walking back into school with the championship trophy, to ovations from everyone, is a memory this team will never forget. ■

Congratulations to this year’s GBBL Tournament champions!

VALLEY COLLABORATIVE

Spring is Sprouting at Valley Transitional Middle/High School

Something is sprouting at Valley Collaborative. This year, Valley's Transitional Middle and High School has been partnering with Giving Gardens, a non-profit organization that seeks to educate students about where food comes from and inspire an interest in growing healthy.

Giving Grocers brought their mission to Valley Collaborative with multi-week programs diving into basic nutrition and gardening. Students began their growing with microgreens, followed by larger, take-home plants, all leading up to the students getting to plant, look after, and harvest from indoor, vertical planter towers. These planters are full of greens and herbs (all planted by students), and placed in one of their kitchen spaces. The students will get to not only watch as their plants grow and thrive, but enjoy the absolute freshest, healthiest foods that they can use in their home cooking.

We start off in the classroom with education on healthy eating and portion sizes," says Maggie Curran, an occupational therapist. "Then the students get to grow their own vegetables like pea shoots, spinach, and beans," says Maggie. The clay planters that are now home to a bounty of greens were also made by the students.

Maggie says that as the planters have begun to fill with sprouts, the students have gotten more excited. Cooking classes now start with a survey of which vegetables are ready to harvest and incorporate into the meals students are preparing.

Students are also learning about how to build balanced meals as well as how to make sense of nutrition labels. Staffers from Giving Gardens will even be accompanying students to the grocery store to help them work on making nutritious choices, including how to shop for produce that's in season—lessons that will last long after the current crop of veggies has been harvested.

Maggie says the students' interest in seeing their own food grow has brought the issue of healthy eating home for them. "Overall, it's been great and the students are responding really well. Their interest makes it all the easier for them to enjoy and experience the nutritious produce they have grown. When they get to plant their own food, it just gives it that much more meaning." ■



SIGNS OF SPRING AT VALLEY!



TOP: EMILY ST. PIERRE SHOWS OFF A CLAY POT PLANTER MADE BY VALLEY STUDENTS AS AMY DOUCETTE FROM THE GIVING GARDENS PROJECT LOOKS ON; BOTTOM: COOPER KEOMANIVONG DISPLAYS SOME OF THE SEEDS THAT WILL SOON BE TURNING INTO VEGGIES, THANKS TO THE VALLEY STUDENTS' GREEN THUMBS.



VALLEY COLLABORATIVE

Former Students Keep Valley Running

Lucas Flores graduated from Valley in 2019. After graduation he tried several different trades, including building police cars and towing cars for the State Police. Then one morning, he awoke with this thought: “I wonder what’s going on at Valley?” Lucas dropped by for a visit and the rest is history. “One of the maintenance workers told me that he needed someone to help him keep the facilities in top shape,” recalls Lucas. He responded without missing a beat. “I said ‘sign me up.’” Today Lucas works as part of the facilities crew at Valley and says that he loves it. “Every day is different.”

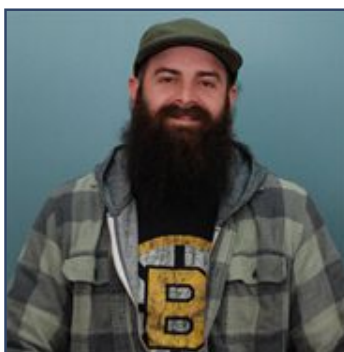
Preparing students to thrive in



LUCAS FLORES

the workplace after graduation has long been a central goal at Valley Collaborative. Now, a growing number of former students are returning to Valley to join the ranks of its employees, helping current students have a great educational experience.

Lucas says that returning to his former school has enabled him to connect with students. While he doesn’t like to brag, Lucas says that the middle school students adore him. “When I show up to school on my motorcycle they get very excited.” The students are also aware of Lucas’ goal to become a pilot and join the airline industry. “They’re rooting for me to succeed,” says Lucas.



JAY COLLINS

Unique bonds

Jay Collins graduated from Valley in 2008. He says that even during his two years as a student, he wanted to work at Valley and even served as a sort of junior staff person. He realized his dream seven years ago when he took a job as a teacher’s aid in Valley’s Alternative Middle/High School. Jay says that his experiences as a former student enable him to form unique bonds with current students. When he sees kids struggling socially or academically, he thinks back to his own student days. “I understand what they’re going through,” says Jay.

A role model

Logan Cardillo’s return to Valley was more recent. He graduated in 2019 and was searching for work when Assistant Principal Glen



LOGAN CARDILLO

Costello sent him an application. Logan filled it out and was hired soon after. He now works as a one-to-one aide in the Alternative Middle School program. Logan says that he can easily relate to where Valley students are coming from because he was one of them so recently. “The first week I was back a student found my year-book picture. Let’s just say I was not the most photogenic student.”

In addition to working at Valley, Logan works part-time at a convenience store and attends UMass Boston where he is a junior majoring in



MATT DIAZ

criminology. He’s hoping to attend law school one day. In the meantime, he encourages current Valley students to consider college after graduation. “Especially for kids who maybe aren’t thinking about college, I can point to what I’m doing and say ‘see, you can do it too,’” says Logan.

Matt Diaz graduated from Valley’s Chelmsford campus in 2013. He pursued a degree in human services after graduation, spurred by his interest in therapy and psychology. While searching for work, Matt happened to recall that Julie Fielding, who had been the social worker for Valley’s Alternative Middle/High School, had recently become principal of the school.

*continued on back page

VALLEY COLLABORATIVE

Adult Services: Spring Has Sprung!

Spring has sprung, and the individuals in the Today & Tomorrow program are as busy as bees! In mid-March, the program welcomed more than a dozen individuals back onsite to Linnell Circle. Transitioning back to in-person programming after about two years of virtual services has been thrilling for our recent additions. Program members are not only excited to reconnect with others, but now have opportunities to practice hands-on employment skills and return to community work and volunteer sites. Most members of the program are now going out to paid worksites at

A return to in-person programming means reconnecting with others, practicing hands-on employment skills, and returning to community work and volunteer sites.

least 2 or 3 days per week, and fill their time otherwise with volunteer and CBDS activities. Our remote team continues to work as hard as ever too-- helping individuals keep skills sharp (and develop new ones!) for when we can add more people to our onsite programming.

Our daily schedules continue to grow as well, and recently we have added two great new volunteer opportunities to our CBDS programming. The adult program has recently partnered with Meals on Wheels in Tewksbury. Groups help pick up hot and cold food packs from a community center, navigate through the town to locate houses, and drop off meals to homebound seniors. This has allowed group members to practice their profession-



al greetings and social skills—two major topics that we have covered in onsite CBDS programming. One individual in the program mentioned, “I like going there so that we can visit new people while helping them!”

Otherwise, groups have also started volunteering twice per week at Strongwater Farm, a therapeutic equestrian center in Tewksbury. Individuals have had opportunities to see how the farm runs and the importance of daily upkeep to keep the animals healthy and happy. They have spent time outside cleaning and refilling water buckets for animals, mucking stalls, and interacting with farm personnel. This has allowed individuals to increase their communication skills by working collaboratively to complete various projects, and given them more opportunities to get fresh air and engage in physical exercise. Seeing horses and other animals is a cute bonus, too! We look forward to continuing our partnerships with these great organizations so our individuals can develop meaningful connections in our community and promote positive leadership skills. ■

LEFT: SHARIFAH NAMIGADDE AT BRISTOL MEYERS SQUIBB.. AFTER TWO YEARS OF VIRTUAL SERVICES, MOST MEMBERS OF THE PROGRAM ARE NOW GOING OUT TO PAID WORKSITES AT LEAST TWO OR THREE DAYS PER WEEK.

New Beginnings

New beginnings can be scary for someone venturing out on a new journey, but they can also be exciting, as this is a time full of opportunities. During the darkness of the pandemic, many bright new stars were born right here at Valley Collaborative. While welcoming these wonderful new individuals into the Today & Tomorrow program, many new opportunities were created for all.

Throughout the pandemic, Valley Collaborative was resilient and nurtured a virtual environment in which individuals felt safe and supported. And they thrived! While many people were isolated in their homes, Valley Collaborative offered a way for our individuals to stay connected to one another and their community. Valley Collaborative's Today and Tomorrow program continued to grow as they introduced a number of new individuals to the program during this time.

As each individual began their new journey here at Valley, he or she was greeted with kindness, enthusiasm, and excitement. The first day always included an opportunity for the new individual as well as current folks in the program to work on their social skills.

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VALLEY COLLABORATIVE

Valley Earns Top Marks

**continued from cover*

- The Department was impressed with Valley's timeout and restraint procedures and that students had the opportunity to de-escalate in various sensory spaces (for example "Chillville") before a timeout or restraint was needed.
- Incident reports were very detailed and explained in full the incident and the reason and rationale for all actions taken. Furthermore, a full explanation was given if a restraint or timeout room was required for a student to de-escalate.
- Students were quickly reintegrated back into the classroom after various de-escalation techniques were provided resulting in minimal disruption to time on learning which was observed across all programs.
- There is no technical support needed from the Department at this time.

It is a pleasure to work with such a high performing, committed and caring team. A special thank you to Joia Mercurio, Deputy Director, for her ongoing leadership and support. Valley is very fortunate to have the exemplary program Principals: Nicole Noska, Julie Fielding, Heather MacKay along with the exceptional teams they have built of educators, therapists, and paraprofessionals. We are so fortunate to have experienced and competent leaders working with our students, families, and staff.

We also gratefully acknowledge all of Valley's support staff for the pride they take in their work which ensures clean and safe learning environments for students and staff: Renato Silva, Ian MacAulay, Sandy Morency and their teams. The schools have never looked

better. We also want to recognize the "behind-the-scenes" hard work and dedication of the Technology Department and Administrative Support Staff: Mazyar Moshtaghi, Donna Suarez, Kelly Fitts, Karen Blackburn, Donna Driscoll and Kathy Diaz, to name a few.

Completing a program review during a pandemic presents unique challenges. Staffing shortages and health care protocols were constant stressors. Thanks goes to Kari Morrin, Director of Human Resources, for the countless hours of hard work and dedication she has put into our workforce. Sincere appreciation also goes to Lead Nurse Jessica Scalzi and her team for their tireless and significant support. Nurse Jessica Scalzi continues to go above and beyond to ensure all COVID procedures and protocols are followed to maintain the health and safety of students and staff.

Last but not least, I would like to thank Valley's Board of Directors, for their ongoing guidance and support as we navigate this important and difficult work. The board's support of Valley's staff and the work we do is continuously demonstrated through various Board votes, most recently the generous longevity package the Board voted in order to address retention and recruitment issues we have struggled with during this pandemic.

The Board's ongoing commitment to offering its staff competitive compensation, while maintaining some of the lowest tuition rates in the Commonwealth in a non-union setting, helps to ensure that we can recruit and retain staff that are among the most talented in the field.

Also, noteworthy, is their support of a robust and well-resourced curriculum which ensures our students are able to reach their full potential.

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New Beginnings

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Individuals were encouraged to introduce themselves and discuss a little bit about their interests such as hobbies and favorite work experiences. Eventually this process became more automatic, and individuals began to initiate this process on their own. Staff has continued to facilitate these social interactions at times throughout each day on Zoom and we have seen many friendships develop and grow throughout this time.

In addition to these amazing connections and friendships, program individuals have had the opportunity to take on more of a leadership role by helping new folks adjust to the Zoom schedule as well as demonstrate appropriate and professional social norms during meetings as they lead by example. This, not only has helped current folks to adopt better work habits, but has also been a great confidence booster for all. One of the Zoom facilitators, Patricia Evans, said, "I have noticed the individuals' confidence increase during this time and they are taking more initiative and interacting more."

During a time of physical distance, where much of the world remained isolated, Valley's individuals overcame many challenges, adapted to new technologies, and welcomed in some amazing new faces that have truly added to the camaraderie of the Valley community. As we all continue to embrace new challenges and opportunities, we are reminded that we have the support and guidance of one another to help us get through anything that we may face in the future. ■

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Valley Collaborative Board

Chair: Mr. Timothy Piwowar
Superintendent, Billerica Public Schools

Dr. Jay Lang
Superintendent, Chelmsford Public Schools

Mr. Steven Stone
Superintendent, Dracut Public Schools

Dr. Laura Chesson
Superintendent, Groton-Dunstable Regional School District

Dr. Denise Pigeon
Superintendent, Nashoba Valley Technical School District

Mr. Brad Morgan
Superintendent, North Middlesex Regional School District

Ms. Brenda Theriault-Regan
Interim Superintendent, Tewksbury Public Schools

Dr. Michael Flanagan
Superintendent, Tyngsborough Public Schools

Dr. Christopher Chew
Superintendent, Westford Public Schools

Top Marks for Valley

*continued from page 7

Former Valley Students

*continued from page 5

So he reached out to inquire about job opportunities. When she told him that there was a one-to-one aide position open, he jumped at the opportunity.

Matt says that his experience attending Valley has been a huge asset for him now that he works with students. "I get them and that enables me to create a rapport very easily."

Three years ago, Matt moved upstairs to the Transitional Middle/High School. He now works as a classroom registered behavior technician, assisting students who are primarily non-verbal. Matt says

that his current role requires him to be even more creative about how to connect with students. "One of the things I really appreciate about Valley is that there is always room for growth," says Matt, who attends UMass Lowell and is studying psychology. "No matter what you want to do they try to help you get to that point."

Matt, Jay, Logan and Lucas all say that returning to Valley as employees has enabled them to give back to a place that is special to them.

"I wanted to help somebody else the way that Valley helped me," says Lucas. ■

We would like to thank the Board of Directors for the confidence and trust they have in Valley to care for and educate some of their most vulnerable students.

Please know, we are committed to maintaining the highest quality programming for your/our students and to always be deserving of your support.

If you ever have a suggestion or need assistance, my door is always open.

My best to you,

Chris

Chris A. Scott, Ph.D.
Executive Director