

Valley Collaborative
Board of Directors Meeting
Thursday, September 12, 2024 ▪ 10:00 a.m.

[Virtual Meeting Link: Public Attendees](#)

Action Required

- I. Approval of Minutes
 - a. Board of Directors Meeting, General Session Minutes: June 6, 2024
- II. Financial Update
 - a. FY'24 & FY'25 Update
 - Balance Sheet as of 6.30.2024
 - Income Statement as of 6.30.2024
 - 25% Cumulative Surplus Calculation
 - b. Treasurer's Report(s)
 - c. PARS Statement(s)
 - d. Enrollment Update
- III. Valley Collaborative Central Office Updates
 - a. Vote to approve Negotiations with Middlesex Retirement Board Lease Extension - 25 Linnell Circle
 - b. Vote to approve additional funding for FY'25 Vehicle Replacement Strategy
- IV. Vote to approve Today and Tomorrow Program Handbook & Policies and Procedure Manual
- V. Disabled Persons Protection Commission (DPPC) Abuser Registry Compliance Review
 - a. Vote to approve Human Resources and Payroll Policies and Procedure Manual

No Action Required

- VI. Quarterly Reports on Collaborative Business – FY'24 Fourth Quarter
- VII. 2023 – 2024 Valley by the Numbers Presentation
- VIII. Making a Difference Awards
- IX. Communications

State Agencies:

- a. DESE Center for Educational Options Education Collaborative Team June 2024 Bulletin
- b. MOEC Northeast Collaboratives and Special Olympics

Valley Program Updates:

- a. Elementary School September Monthly Newsletter
- b. Alternative Programming at the Transitional High School Update – N/A
- c. Middle School and Transitional Programming Update at the Transitional High School – N/A
- d. Adult Services Update – N/A
- e. Safety Committee Update
- f. Facilities Update

Community and Staff:

- a. Elementary School Principal to Tyngsboro Fire Department
- b. Tyngsboro Fire Department Response to Elementary School Principal
- c. Billerica Police Chief Frost Thank You Note re: Sgt. Taylor

**Valley Collaborative Board of Directors
General Session Meeting Minutes
June 6, 2024
10:03 a.m. – 11:20 a.m.
11 Executive Park Drive, N. Billerica, Massachusetts**

Board Members Present: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan
Dr. Denise Pigeon

Board Members Absent: Dr. Christopher Chew

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

Also Present: Thomas Lent, Barrow Weatherhead Lent LLP; Dr. Anthony Bent, Consultant for M.A.S.S. Association of School Superintendents; Kathryn Cannie, Senior Manager, PARS; Lori Likus, Creative Coaching Consultant

Call to Order: Dr. Jay Lang, Chairman, convened the Collaborative Board Meeting at 10:03 a.m.

Dr. Lang and Dr. Chris Scott welcomed all in attendance.

Making a Difference Awards

Dr. Scott and members of the Leadership Team presented the “Making A Difference Awards” to students and staff. The Board, Dr. Anthony Bent and Dr. Scott presented the Annual Dr. Anthony Bent Leadership Award to Mazyar Moshtaghi, Chief Technology Officer.

The Board and Dr. Scott acknowledged Dr. Laura Chesson who will be leaving the Groton-Dunstable Regional School District and thus, the Collaborative Board of Directors effective June 30, 2024.

Approval of Minutes

Dr. Jay Lang 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:

VOTED: To approve the General Session Meeting Minutes for the Board of Directors dated April 25, 2024.

The vote was 6-0-2. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon,

Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery. Abstained: Mr. Steven Stone and Mr. Brad Morgan.

Board Governance 2024-2025

Elect Board Chairperson

Dr. Jay Lang referenced the Collaborative Agreement that provides that the Board shall, annually during the final scheduled meeting of the school year, organize itself by electing a Chairperson and any other Board positions deemed appropriate by the Board. In addition, the Chairperson, with the majority vote of the Board, may appoint such committees and subcommittees of the Board. The Board discussed candidates for Chairperson for the 2024-2025 School/Fiscal Year.

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

VOTED: That the Board of Directors nominates and elects Dr. Jay Lang to continue as the Chairperson of the Board of Directors.

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Appoint/Re-appoint Committee Members

On a motion duly made by Mr. Steven Stone and seconded by Dr. Laura Chesson, a quorum of voters being present, it was voted:

VOTED: That the Board of Directors approves the appointment of Dr. Jay Lang, Dr. Michael Flanagan, Dr. Denise Pigeon and Ms. Brenda Theriault-Regan as Members of Executive Committee for the Board of Directors for the 2024-2025 School Year.

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Financial Update

Executive Director's Report

Dr. Scott directed the Board to the financial update memo contained within the Board meeting materials, which was prepared with the assistance of Mr. James George, the Collaborative's

Business Manager/Accountant. Dr. Scott generally reviewed the 3rd Quarter Financials, the 4th Quarter projections and Fiscal Year 2024 conclusions. Dr. Scott reviewed the revenues, expenses, budget and enrollment. Dr. Scott summarized her recent discussions with OPEB Trust representatives. She reviewed additional expenses incurred this past year. She further provided year-end projection figures for revenue and expenses within the year end summary. She also reviewed the projected cumulative surplus fund calculation, which would be reviewed further during the Board meeting in September 2024. The Board discussed.

Dr. Scott also reviewed with the Board the fiscal year 2024 enrollment numbers by member and non-member district and the revenue received by each district.

Kathryn Cannie, Senior Manager, PARS distributed Trust Program materials and reviewed the current funding levels, indicating that with a potential contribution of the surplus fund amounts the OPEB Trust would be considered near fully-funded. Ms. Cannie provided examples of several public entities with whom she works which funding remains far-far less than the Collaborative (approximately 78% funded, as of June 2023, with present markets and conditions factored). She anticipated a more recent analysis to be completed by September 2024.

Treasurer's Report/Evaluation/Contract

Ms. Heidi Kriger, the Collaborative Treasurer, provided the Board with her report which covered the months through April 2024. Ms. Kriger provided a verbal summary of her report, including available balances, transfers, withdrawals, interest income and ending balances. A written summary report was contained within the Board materials. There was no further discussion.

On a motion made by Ms. Brenda Theriault-Regan and seconded by Dr. Kerry Clery, a quorum of voters being present, it was voted:

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

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Dr. Jay Lang referenced the Board's requirement to annually evaluate the Treasurer's performance and effectiveness. Dr. Scott summarized and referenced Ms. Kriger's completed evaluation contained within the Board material. The Board and Dr. Scott recognized Ms. Kriger. There was no further discussion.

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

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

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Dr. Scott and the Board discussed the extension of the Treasurer's contract for a five-year period.

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

VOTED: That the Board of Directors authorizes the Chairman, to finalize and execute an agreement by and between the Collaborative and Ms. Heidi Kriger, as its Treasurer, for the 2024-2025 School Year with the term of the agreement to be July 1, 2024 through June 30, 2029.

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Executive Director's Evaluation

Dr. Jay Lang summarized the Executive Director's written evaluation by the Board of Directors highlighting the Executive Director's exemplary performance as applied to the metrics and the narratives submitted by Board members. The Board acknowledged such an exemplary performance. Dr. Scott acknowledged the Collaborative staff.

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

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

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Business Manager (Accountant) Evaluation

Dr. Jay Lang referenced the Board's requirement to annually evaluate the performance and effectiveness of its business manager. Dr. Scott referenced and explained the ongoing transition within the Business Office. Dr. Scott and the Board acknowledged and recognized the current members of the Business Office. Dr. Scott and Dr. Lang referenced the completed evaluation of Mr. Jim George within the Board materials. The Board and Dr. Scott recognized Mr. George. The Board discussed.

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

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

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Approval of 2024-2025 Employee Handbook

Dr. Scott referenced the employee handbook contained within the Board materials indicating that there were no substantive changes for the 2024-2025 School Year. There was no further discussion.

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

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

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Approval of 2024-2025 Student & Family Handbook

Dr. Scott referenced the student and family handbook contained within the Board materials indicating that there were no substantive changes for the 2024-2025 School Year. There was no further discussion.

On a motion made by Dr. Laura Chesson and seconded by Ms. Brenda Theriault-Regan, a quorum of voters being present, it was voted:

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

The vote was 8-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery, Mr. Brad Morgan, Mr. Steven Stone

Valley Collaborative District Improvement Plan Update

Dr. Lori Likis presented updates to the District Improvement Plan Update for Valley Collaborative, which were also summarized within a memo contained in the Board materials. There was no further discussion.

[Mr. Brad Morgan left the meeting at 11:14 a.m. Mr. Steven Stone left the meeting at 11:16 a.m.]

Valley Program Updates

Dr. Scott introduced separately members of the Leadership Team, each of whom provided the Board with an update regarding their respective schools and/or programs. 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. Michael Flanagan and seconded by Ms. Brenda Theriault-Regan, a quorum of voters being present, it was voted:

VOTED: To adjourn the Board meeting.

The vote was 6-0. Yes: Dr. Jay Lang, Dr. Laura Chesson, Dr. Denise Pigeon, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Dr. Kerry Clery

Dr. Jay Lang adjourned the Collaborative Board Meeting at 11:20 a.m.

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

- School Year 2023-2024 Electronic Board Binder Board Meeting, June 6, 2024

Respectfully Submitted,

Dr. Jay Lang, Chairman

Dated: _____



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Mr. James George, Accountant/Business Manager
Date: September 12, 2024
Re: Financial Update - FY'24 & FY'25

Valley Collaborative's FY'24 school year was very successful programmatically and financially.

- The financial position of the Collaborative remains very strong. The total assets at June 30, 2024 is \$19,205,477 (unaudited). This includes \$7,374,283 (unaudited) held in the OPEB Trust at June 30, 2024.
- Capital fund remains fully funded at the end of FY'24 (\$1.5M).
- Change in net assets from operations in FY'24 was approximately \$2,017,926 as a result of strong management of Collaborative expenses and personnel costs while continuing to meet the needs of the students and adult clients the Collaborative serves.
- The Board has previously voted to return \$1,695,822 of surplus in FY'25. Given that the 25% Surplus calculation is premised upon Valley's expense budget, the Cumulative Surplus Percentage before the final audit is currently 24.33%. As such, no additional vote is required at this time. After the final audit is complete in November, an additional vote may be required.

Required Action:

None

Attachments:

- Preliminary 25% Surplus Calculation
- Balance Sheet June 30, 2024
- Income Statement June 30, 2024
- PARS May 2024
- Treasurer's Report May 2024
- PARS June 2024
- Treasurer's Report June 2024
- PARS July 2024
- Treasurer's Report July 2024
- Annual PARS Statement
- PARS Target OPEB Trust Program



PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION COMMISSION

OPEB SUMMARY REPORT

**School Districts, Other Districts and Authorities,
Counties, and Educational Collaboratives**
May, 2024

Commission Members

Philip Y. Brown, Esq.

Founder, Brown Counsel, LLC
Chair

The Honorable Diana DiZoglio

Auditor of the Commonwealth
Vice Chair

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Practice Area Director, Public Consulting Group

Kate Fitzpatrick

Town Manager, Town of Needham

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Lieutenant, Chelsea Police Department

Richard MacKinnon, Jr.

President, Professional Firefighters of Massachusetts

Jennifer F. Sullivan, Esq.

Investment Professional

Bill Keefe

Executive Director

John Boorack

Actuary

James Lamenzo

Actuarial Consultant

Public Employee Retirement Administration Commission

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OPEB SUMMARY REPORT | Introduction and Notes

In accordance with Section 20A of Chapter 32B, we are pleased to provide our latest summary report on Other Post-Employment Benefits (OPEB). Other Post-Employment Benefits are benefits, other than pension distributions, that employees may begin to receive from their employer upon retirement. The main types of OPEB are health, dental, and life insurance.

This report reflects the most recent actuarial information for school districts, other districts and authorities (including electric, fire, health, redevelopment, sewer, transit, and water), counties, and educational collaboratives* that was provided to PERAC as of April 30, 2024. Information received after that date will be included in subsequent summary reports.

The cumulative Total OPEB Liability for the approximately 220 districts included in this report is approximately \$5.0 billion. The cumulative Fiduciary Net Position is approximately \$716 million resulting in a cumulative Net OPEB Liability of \$4.2 billion and a cumulative funded ratio of 14.4%.

This summary report details the Measurement Date, Total OPEB Liability (TOL, or the plan's liability based on service to date), Fiduciary Net Position (FNP which equals the Market Value of Assets), Net OPEB Liability (TOL less FNP, often referred to as Unfunded Liability), Funded Ratio (FNP/TOL), and the Blended Discount Rate. The Blended Discount Rate is the single interest rate that reflects the present value of all projected benefit payments. The methodology to determine this present value is complex. This methodology reflects a long-term expected rate of return for years in which assets are projected to be sufficient to make projected benefit payments and a tax-exempt high-quality municipal bond rate (typically lower than the long-term rate) for years in which assets are projected not to be sufficient to make projected benefit payments. If assets are projected to be sufficient to pay all future projected benefits, the Blended Discount Rate will reflect the long-term expected rate of return. Likewise, if assets are projected not to be sufficient to make any projected benefits, the Blended Discount Rate will reflect the municipal bond rate. If assets are projected to be sufficient to pay only a portion of the projected benefits, the Blended Discount Rate will fall between the two rates.

* Educational collaboratives are educational services agencies that bring school districts together to form partnerships that create regional educational resources and develop a broad range of innovative programming for the most vulnerable students.

OPEB SUMMARY REPORT | Introduction and Notes (continued)

Some entities indicated that no OPEB benefits were provided. Those entities are not included in this report. Some entities have not provided the current report, so we have used the most recent report PERAC has on file. Our report reflects the results determined by over 10 actuarial firms. All dollar amounts are in thousands

PERAC's first Other Post-Employment Benefits (OPEB) summary report was released in 2016. That report reflected the Governmental Accounting Standards Board requirements at the time. Our December 2021 report and this latest report reflect the current GASB 74 and GASB 75 standards. These reports are available on our website at mass.gov/perac.

Notes on Actuarial Assumptions

Discount Rate

We have shown only the Blended Discount Rate in our summary report because it is the rate used to determine plan liabilities. The long-term rate of return on assets and the municipal bond rate are not always shown in valuation reports.

Medical Trend

The medical trend assumption reflects the expected annual increase in medical costs. This assumption varies by plan and by actuary. Initial rates are generally 6.0% - 8.0%. However, about 20% of plans use an assumption of 4.5% or below. We expect the size of this group will decrease as we receive more updated valuation reports. The ultimate trend rate is generally 3.5% - 5.0%. The year in which the ultimate trend is reached varies widely from 2021 - 2075.

Mortality

All plans (except a few small plans) use a generational mortality assumption. Most plans (about 80%) use some version of the RP-2014 mortality table. A much smaller number of plans use a version of the Society of Actuaries Pub-2010 mortality tables. Only one plan uses the more outdated RP-2000 mortality table. For mortality improvement, most plans reflect a version of the MP scale.

OPEB SUMMARY REPORT | School Districts

May 2024 Report. Dollars in thousands.

School Districts	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
Acton-Boxborough Regional School District	6/30/22	\$62,809	\$8,270	\$54,539	13.2%	5.71%
Amherst-Pelham Regional School District	6/30/22	69,551	546	69,006	0.8%	4.09%
Ashburnham-Westminster Regional School District	6/30/23	30,484	156	30,328	0.5%	4.19%
Assabet Valley Regional Technical High School District	6/30/23	17,128	466	16,663	2.7%	3.82%
Athol-Royalston Regional School District	6/30/20	41,349	0	41,349	0.0%	2.66%
Ayer Shirley Regional School District	6/30/22	23,315	54	23,262	0.2%	4.10%
Berkshire Hills Regional School District	6/30/22	65,299	0	65,299	0.0%	3.54%
Berlin-Boylston Regional School District	6/30/22	15,617	175	15,442	1.1%	3.54%
Blackstone-Millville Regional School District	6/30/21	42,144	0	42,144	0.0%	2.25%
Blackstone Valley Vocational Regional School District	6/30/22	34,982	380	34,602	1.1%	4.19%
Blue Hills Regional Technical School District	6/30/22	40,311	0	40,311	0.0%	4.09%
Boston Renaissance Charter Public School	6/30/23	403	0	403	0.0%	4.25%
Bridgewater Raynham Regional School District	6/30/23	130,201	85	130,116	0.1%	4.13%
Bristol Plymouth Regional School District	6/30/22	31,696	805	30,891	2.5%	4.52%
Cape Cod Regional Technical School	6/30/22	15,322	2,051	13,271	13.4%	7.00%
Central Berkshire Regional School District	6/30/22	52,244	1,804	50,440	3.5%	4.96%
Chesterfield-Goshen Regional School District	6/30/21	1,080	0	1,080	0.0%	2.75%
Concord - Carlisle Regional School District	6/30/21	17,109	7,569	9,540	44.2%	6.50%
Dennis-Yarmouth Regional School District	6/30/22	83,228	273	82,955	0.3%	3.54%
Dighton-Rehoboth Regional School District	6/30/22	47,423	151	47,272	0.3%	4.11%
Diman Regional Vocational Technical School	6/30/22	34,094	0	34,094	0.0%	4.09%
Dover-Sherborn Regional School District	6/30/23	24,305	1,216	23,089	5.0%	5.06%
Dudley Charlton Regional School District	6/30/22	31,875	0	31,875	0.0%	2.16%
Farmington River Regional School District	6/30/23	9,484	0	9,484	0.0%	3.65%
Franklin County Technical School	6/30/22	12,890	0	12,890	0.0%	4.09%
Freetown Lakeville Regional School District	6/30/21	81,822	0	81,822	0.0%	2.25%
Gateway Regional School District	6/30/21	15,828	330	15,498	2.1%	2.40%
Gill-Montague Regional School District	6/30/21	66,141	0	66,141	0.0%	2.18%
Greater Lawrence Technical School	6/30/20	86,721	315	86,406	0.4%	2.21%
Greater Lowell Technical High School	6/30/22	55,658	961	54,697	1.7%	4.09%
Greater New Bedford Regional Vocational Technical HS	6/30/23	95,166	560	94,606	0.6%	4.20%
Groton-Dunstable Regional School District	6/30/23	88,176	0	88,176	0.0%	4.13%
Hamilton Wenham Regional School District	6/30/22	39,438	100	39,338	0.3%	5.50%
Hampden-Wilbraham Regional School District	6/30/21	95,353	327	95,026	0.3%	2.16%

OPEB SUMMARY REPORT | School Districts

May 2024 Report. Dollars in thousands.

School Districts	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
Hampshire Regional School District	6/30/21	\$16,500	\$0	\$16,500	0.0%	2.66%
Hawlemont Regional School District	6/30/23	2,076	0	2,076	0.0%	4.13%
Hoosac Valley Regional School District	6/30/22	39,575	0	39,575	0.0%	3.54%
Lincoln Sudbury Regional School District	6/30/22	31,463	2,905	28,558	9.2%	5.94%
Manchester- Essex Regional School District	6/30/23	28,292	4,896	23,396	17.3%	7.50%
Martha's Vineyard Regional School District	6/30/23	29,250	7,996	21,255	27.3%	6.50%
Masconomet Regional School District	6/30/21	84,881	493	84,388	0.6%	2.18%
Mendon-Upton Regional School District	6/30/23	63,267	0	63,267	0.0%	4.09%
Minuteman Regional School District	6/30/22	21,252	402	20,851	1.9%	3.54%
Mohawk Trail Regional School District	6/30/22	32,345	148	32,197	0.5%	4.09%
Monomoy Regional School District	6/30/22	59,148	901	58,247	1.5%	3.54%
Montachusett Regional Vocational Technical School	6/30/22	46,541	0	46,541	0.0%	4.09%
Mount Greylock Regional School District	6/30/21	53,609	0	53,609	0.0%	2.16%
Narragansett Regional School District	6/30/21	51,454	125	51,329	0.2%	2.09%
Nashoba Regional School District	6/30/23	46,281	865	45,416	1.9%	3.65%
Nashoba Valley Technical School District	6/30/23	9,772	1,990	7,781	20.4%	5.71%
Nauset Regional School District	6/30/22	33,712	1,596	32,116	4.7%	4.75%
New Salem/Wendell School	6/30/21	3,089	0	3,089	0.0%	2.75%
North Middlesex Regional School District	6/30/22	99,710	610	99,100	0.6%	4.25%
Northborough-Southborough Public Schools	6/30/21	46,634	279	46,355	0.6%	2.50%
Northeast Metropolitan Regional Vocational School District	6/30/21	60,868	1,446	59,422	2.4%	2.51%
Northern Berkshire Vocational Regional School District	6/30/23	14,987	0	14,987	0.0%	4.09%
Old Colony Regional Vocational Technical High School District	6/30/22	16,147	854	15,292	5.3%	4.92%
Old Rochester Regional School District	6/30/21	24,803	111	24,691	0.5%	2.25%
Pathfinder Regional Vocational Technical High School District	6/30/22	13,277	0	13,277	0.0%	4.09%
Pentucket Regional School District	6/30/21	80,872	905	79,967	1.1%	2.16%
Pioneer Valley Regional School District	6/30/22	20,817	0	20,817	0.0%	4.09%
Quabbin Regional School District	6/30/21	43,206	51	43,155	0.1%	2.18%
Quaboag Regional School District	6/30/22	14,506	0	14,506	0.0%	3.54%
Ralph C. Mahar Regional School District	6/30/22	19,993	0	19,993	0.0%	4.09%
Shawsheen Valley Regional Vocational Technical School District	6/30/21	55,702	4,632	51,070	8.3%	5.00%
Silver Lake Regional School District	6/30/23	48,391	235	48,155	0.5%	4.19%
Somerset Berkley Regional School District	6/30/23	15,518	1,091	14,426	7.0%	4.97%

OPEB SUMMARY REPORT | School Districts

May 2024 Report. Dollars in thousands.

School Districts	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
South Middlesex Regional Vocational Technical School District	6/30/21	\$31,011	\$577	\$30,434	1.9%	2.18%
South Shore Regional Vocational Technical School	6/30/19	10,470	667	9,803	6.4%	2.75%
Southeastern Regional School District	6/30/22	24,961	55	24,906	0.2%	4.21%
Southern Berkshire Regional School District	6/30/21	53,166	0	53,166	0.0%	2.16%
Southern Worcester County Regional Vocational School District	6/30/20	16,020	424	15,596	2.6%	2.31%
Southwick-Tolland- Granville Regional School District	6/30/22	21,565	333	21,232	1.5%	3.54%
Spencer- East Brookfield Regional School District	6/30/22	40,702	0	40,702	0.0%	2.25%
Tri-County Regional School District	6/30/21	30,971	1,121	29,850	3.6%	3.75%
Triton Regional School District	6/30/23	70,451	13	70,439	0.0%	3.65%
Up-Island Regional School District	6/30/23	11,961	5,529	6,432	46.2%	6.50%
Upper Cape Cod Regional Technical School	6/30/21	23,490	749	22,741	3.2%	2.16%
Wachusett Regional School District	6/30/21	229,540	13	229,527	0.0%	2.16%
Whitman Hanson Regional School District	6/30/21	133,954	284	133,671	0.2%	2.22%
Whittier Regional Technical High School	6/30/21	54,310	107	54,203	0.2%	2.16%

OPEB SUMMARY REPORT | Other Districts and Authorities

May 2024 Report. Dollars in thousands.

Other Districts and Authorities	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
Acton Water Supply District	6/30/22	\$1,060	\$1,254	\$(194)	118.3%	7.00%
Adams Fire District	6/30/22	1,359	0	1,359	0.0%	4.09%
Ashburnham Municipal Light Plant	12/31/23	1,081	719	362	66.5%	5.25%
Barnstable Fire District	6/30/22	12,449	257	12,193	2.1%	3.54%
Belchertown Water District	6/30/23	141	0	141	0.0%	4.09%
Boston Public Health Commission	6/30/21	118,253	36,668	81,585	31.0%	6.25%
Bourne Water District	6/30/22	1,136	238	898	20.9%	6.50%
Boylston Municipal Light	12/31/20	369	316	52	85.8%	6.00%
Braintree Electric Light Department	12/31/22	11,635	8,280	3,355	71.2%	6.30%
Brockton Area Transit Authority	6/30/21	894	741	153	82.8%	3.58%
Buzzard's Bay Water District	6/30/21	1,185	0	1,185	0.0%	2.16%
Byfield Water District	6/30/20	395	73	322	18.5%	2.75%
Cambridge Redevelopment Authority	12/31/23	746	469	277	62.9%	5.51%
Cape Cod Regional Transit Authority	6/30/22	1,722	0	1,722	0.0%	3.54%
Cape Light Compact	12/31/22	2,077	0	2,077	0.0%	3.72%
Centerville, Osterville, Marston Mills (COMM) Fire District	6/30/22	21,737	4,071	17,666	18.7%	6.50%
Charles River Pollution Control District	6/30/23	1,030	282	748	27.3%	6.25%
Chelmsford Water District	6/30/23	1,900	1,200	700	63.2%	4.90%
Chicopee Electric Light	12/31/21	7,341	5,048	2,294	68.8%	6.00%
Cotuit Fire District	6/30/21	2,247	1,836	410	81.7%	7.00%
Dalton Fire District	6/30/23	2,306	541	1,765	23.5%	4.13%
Dartmouth Fire District #3	6/30/23	1,606	1,098	508	68.4%	5.00%
Dedham-Westwood Water District	12/31/22	1,406	1,201	204	85.5%	5.75%
Dennis Water District	6/30/22	3,117	374	2,742	12.0%	6.50%
Dighton Water District	6/30/21	636	111	525	17.5%	2.50%
Dracut Water Supply District	6/30/23	2,901	2,117	784	73.0%	6.30%
Franklin Regional Council of Governments	6/30/23	3,384	2,632	752	77.8%	6.30%
Georgetown Municipal Light Department	12/31/22	1,560	1,904	(344)	122.1%	6.50%
Grafton Water District	6/30/23	652	449	203	68.8%	3.50%
Great Barrington Fire District	6/30/23	244	57	187	23.2%	3.60%
Greater Attleboro Taunton Regional Transit Authority (GATRA)	6/30/23	6,507	0	6,507	0.0%	4.09%
Greater Lawrence Sanitary District	6/30/21	7,210	437	6,773	6.1%	3.00%

OPEB SUMMARY REPORT | Other Districts and Authorities

May 2024 Report. Dollars in thousands.

Other Districts and Authorities	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
Greater New Bedford Regional Refuse Management District	6/30/22	\$2,949	\$5,671	\$(2,722)	192.3%	3.25%
Groton Electric Light Department	12/31/22	2,072	1,470	601	71.0%	5.02%
Groveland Municipal Light Department	12/31/21	1,286	451	834	35.1%	6.00%
Hampshire County Group Insurance Trust	6/30/22	234	300	(66)	128.3%	4.09%
Holden Municipal Light Department	12/31/22	2,183	1,884	300	86.3%	5.38%
Holyoke Gas and Electric	12/31/22	19,394	18,951	444	97.7%	6.25%
Hoosac Water Quality District	6/30/22	1,507	0	1,507	0.0%	3.00%
Hudson Light and Power Department	12/31/22	3,761	3,220	541	85.6%	5.06%
Hull Municipal Light Plant	12/31/22	895	555	340	62.0%	4.61%
Hyannis Fire District	6/30/22	23,919	0	23,919	0.0%	3.54%
Littleton Municipal Electric Light Department	12/31/20	4,692	3,053	1,639	65.1%	6.50%
Lunenburg Water District	6/30/22	733	0	733	0.0%	4.09%
Lynn Water and Sewer	6/30/21	27,023	0	27,023	0.0%	2.25%
Lynnfield Center Water District	6/30/23	346	301	45	87.1%	6.00%
Lynnfield Water District	6/30/22	1,062	57	1,005	5.4%	3.49%
Malden Redevelopment Authority	6/30/20	2,256	0	2,256	0.0%	2.75%
Marlborough Community Development Authority	6/30/22	957	13	944	1.3%	4.17%
Martha's Vineyard Commission	6/30/21	1,415	377	1,038	26.6%	6.60%
Martha's Vineyard Land Bank	6/30/23	1,376	1,334	42	97.0%	6.50%
Martha's Vineyard Refuse District	6/30/21	2,425	74	2,352	3.0%	2.16%
Martha's Vineyard Regional Transit Authority	6/30/21	560	996	(437)	178.1%	6.60%
Mashpee Water District	6/30/21	3,998	0	3,998	0.0%	2.16%
Massachusetts Convention Center Authority	6/30/21	16,768	16,320	448	97.3%	6.37%
Massachusetts Housing Finance Agency	12/31/22	42,351	42,064	287	99.3%	7.00%
Massachusetts State College Building Authority	6/30/23	891	1,037	(146)	116.4%	7.00%
Massachusetts Water Resources Authority	12/31/22	113,757	63,929	49,828	56.2%	6.75%
MassPort	1/1/23	358,128	311,040	47,088	86.9%	6.75%
Merrimac Electric Light Department	12/31/22	725	482	243	66.5%	6.07%
Metacomet Emergency Communications Center	6/30/20	132	36	96	27.4%	3.00%
Middleborough Gas and Electric	12/31/22	9,741	6,877	2,865	70.6%	5.25%
Middleton Electric Light Department	12/31/22	1,345	1,533	(188)	114.0%	4.97%
Nantucket Landbank	6/30/23	1,873	0	1,873	0.0%	4.13%

OPEB SUMMARY REPORT | Other Districts and Authorities

May 2024 Report. Dollars in thousands.

Other Districts and Authorities	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
Nantucket Regional Transit Authority	6/30/21	\$608	\$0	\$608	0.0%	2.25%
New Bedford Harbor Development Commission	6/30/22	1,084	0	1,084	0.0%	3.95%
North Attleborough Electric Department	12/31/22	7,590	6,302	1,288	83.0%	5.47%
North Chelmsford Water District	6/30/21	438	320	118	73.1%	7.00%
North Sagamore Water District	6/30/21	1,082	10	1,072	0.9%	2.16%
Northern Middlesex Council of Governments	6/30/22	1,228	305	924	24.8%	2.25%
Oak Bluffs Water District	6/30/23	1,643	639	1,004	38.9%	6.50%
Old Colony Planning Council	6/30/23	2,086	992	1,094	47.5%	5.37%
Onset Fire District	6/30/22	3,592	1,311	2,280	36.5%	6.06%
Paxton Municipal Light Department	12/31/22	705	845	(139)	119.7%	5.02%
Pioneer Valley Planning Commission	6/30/23	3,944	594	3,349	15.1%	5.97%
Pioneer Valley Transit Authority	6/30/23	5,049	1	5,048	0.0%	4.13%
Princeton Municipal Light Department	12/31/22	481	0	481	0.0%	4.31%
Quabbin Health District	12/21/22	145	122	23	83.8%	6.41%
Raynham Center Water District	6/30/22	2,050	0	2,050	0.0%	4.09%
Reading Municipal Light Department	12/31/22	9,046	4,777	4,269	52.8%	7.00%
Rowley Municipal Lighting Plant	12/31/22	808	668	140	82.7%	5.00%
Russell Electric Light Enterprise	6/30/21	364	104	260	28.6%	2.16%
Salem-Beverly Water Supply Board	6/30/22	4,461	0	4,461	0.0%	3.54%
Sandwich Water District	6/30/22	5,657	0	5,657	0.0%	3.54%
South Essex Sewerage District	6/30/21	14,844	0	14,844	0.0%	2.25%
South Grafton Water District	6/30/23	502	0	502	0.0%	5.75%
South Hadley Electric Light Department	12/31/23	1,978	1,086	892	54.9%	5.97%
South Hadley Fire District #1	6/30/22	6,383	1,381	5,002	21.6%	5.91%
South Hadley Fire District #2	6/30/22	1,539	258	1,281	16.8%	6.41%
Southeastern Regional Planning & Economic Dev. District	6/30/22	2,058	1,227	831	59.6%	5.21%
Southeastern Regional Transit Authority	6/30/22	290	212	78	73.2%	5.36%
Southfield Redevelopment Authority	6/30/23	428	396	32	92.6%	4.13%
Springfield Area Transit Company	6/30/22	33,976	593	33,383	1.7%	4.30%
Sterling Municipal Light Department	12/31/20	1,775	1,069	706	60.2%	5.75%
Sudbury Water District	6/30/22	2,683	2,340	342	87.2%	6.50%
Swansea Water District	6/30/23	1,046	0	1,046	0.0%	4.13%

OPEB SUMMARY REPORT | Other Districts and Authorities
May 2024 Report. Dollars in thousands.

Other Districts and Authorities	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
Templeton Municipal Light Plant	12/31/22	\$1,927	\$568	\$1,360	29.4%	4.88%
Templeton Sewer Department	6/30/22	663	78	585	11.8%	5.01%
Templeton Municipal Water Plant	6/30/22	923	130	793	14.0%	5.01%
Turner Falls Fire District	6/30/22	2,352	131	2,221	5.6%	2.60%
Tyngsborough Water District	6/30/22	425	0	425	0.0%	4.09%
Upper Blackstone Water Pollution Abatement District	6/30/21	5,353	3,288	2,065	61.4%	7.25%
Wakefield Municipal Gas and Light Department	6/30/22	7,501	7,407	94	98.8%	7.00%
Wareham Fire District	6/30/22	16,433	1,309	15,124	8.0%	5.14%
West Barnstable Fire District	6/30/21	983	276	708	28.0%	7.00%
West Boylston Municipal Light Plant	12/31/23	2,031	1,377	654	67.8%	5.92%
Westfield Gas and Electric	12/31/21	15,046	5,708	9,338	37.9%	5.50%
Woods Hole, Martha's Vineyard and Nantucket Steamship Authority	12/31/21	2,731	0	2,731	0.0%	2.06%

OPEB SUMMARY REPORT | Counties
 May 2024 Report. Dollars in thousands.

Counties	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
Barnstable County	6/30/22	\$37,190	\$1,061	\$36,129	2.9%	3.54%
Bristol County	6/30/21	45,547	76	45,472	0.2%	2.25%
Dukes County	6/30/23	8,259	1,970	6,290	23.8%	3.98%
Nantucket County	6/30/21	609	0	609	0.0%	2.25%
Norfolk County	6/30/22	42,219	2,090	40,129	5.0%	4.05%
Plymouth County	6/30/22	15,425	1,750	13,675	11.3%	7.00%

OPEB SUMMARY REPORT | Educational Collaboratives

May 2024 Report. Dollars in thousands.

Educational Collaboratives	Measurement Date	Total OPEB Liability	Fiduciary Net Position	Net OPEB Liability	Funded Ratio	Blended Discount Rate
ACCEPT Education Collaborative	6/30/21	\$3,941	\$624	\$3,316	15.8%	1.95%
Assabet Valley Collaborative	6/30/22	6,033	203	5,830	3.4%	3.54%
Bi-County Collaborative (BICO)	6/30/21	24,055	3,742	20,313	15.6%	2.10%
Cape Cod Collaborative	6/30/23	2,050	2,356	(306)	114.9%	6.50%
CASE Collaborative	6/30/21	7,964	4,897	3,068	61.5%	6.75%
Central Massachusetts Special Education Collaborative	6/30/21	32,980	1,130	31,850	3.4%	2.09%
CREST Educational Collaborative	6/30/22	8,664	3,675	4,989	42.4%	4.92%
EDCO Collaborative	6/30/21	1,581	2,396	(815)	151.5%	6.00%
Education Cooperative	6/30/21	7,091	425	6,665	6.0%	1.95%
LABB Collaborative	6/30/22	15,571	6,039	9,532	38.8%	5.26%
North River Collaborative	6/30/21	3,907	2,920	987	74.7%	6.75%
Northshore Education Consortium	6/30/21	24,381	0	24,381	0.0%	2.25%
Pilgrim Area Collaborative	6/30/22	3,598	674	2,924	18.7%	5.65%
READS Collaborative	6/30/22	7,854	1,138	6,716	14.5%	4.65%
SEEM Collaborative	6/30/21	29,321	1,322	27,999	4.5%	2.75%
Shore Educational Collaborative	6/30/22	9,348	390	8,959	4.2%	4.59%
South Coast Educational Collaborative	6/30/21	12,523	63	12,460	0.5%	2.50%
South Shore Educational Collaborative	6/30/21	8,729	963	7,765	11.0%	4.00%
Southeastern Massachusetts Educational Collaborative	6/30/22	3,098	457	2,641	14.7%	4.91%
Southern Worcester County Educational Collaborative	6/30/22	6,527	618	5,908	9.5%	4.48%
Valley Collaborative	6/30/23	8,407	6,599	1,808	78.5%	4.69%

PERAC's mission is to provide regulatory oversight and guidance for the effective, equitable, and ethical operation of the Commonwealth of Massachusetts' public pension systems.



**Valley Collaborative
Cumulative Surplus Calculation - FY 24
As of June 30, 2024**

(A)	Voted Cumulative Surplus as of June 30, 2023	5,560,807	
(B)	Amount of (A) used to make contribution to OPEB Trust PY	-	
	Amount of Current Year Return Previously Voted	(2,000,374)	\$304,552 was after last year audit \$1,695,822 is current year return voted during year
(c)	Unexpended FY 24 General Funds	2,238,163	
(D)	Cumulative Surplus as of 6/30/24	5,798,596	
(E)	FY 24 Total General Fund Expenditures	23,832,501	
(F)	Cumulative Surplus Percentage	24.33%	
	Estimated Amount of Excess Cumulative Surplus as of June 30, 2024	<u>(159,530)</u>	

Valley Collaborative
Interim Statement of Net Assets
For the Period Ended
June 30, 2024

UNAUDITED	
ASSETS	
Current Assets	
Cash and Cash Equivalents	\$ 6,924,615
Restricted Investments - OPEB	7,374,283
Accounts Receivable, Net	3,784,357
Prepaid Expenses and Other Assets	46,380
Cash Held for Member Districts	1,075,812
Total Current Assets	<u>19,205,447</u>
Non-Current Assets	
Land & Building	4,627,392
Furniture, Equipment, and Leasehold Improvements,	
Net of Depreciation	2,092,431
Construction in Progress	-
Total Non-Current Assets	<u>6,719,823</u>
TOTAL ASSETS	<u>\$ 25,925,270</u>
LIABILITIES AND NET ASSETS	
Current Liabilities	
Accounts Payable and Accrued Liabilities	\$ 1,704,249
Other Liabilities	2,516,011
Member District Accounts (Settlement)	1,075,812
Total Current Liabilities	<u>5,296,072</u>
Total Liabilities	<u>5,296,072</u>
Net Assets	
Operating - Unrestricted	7,489,954
Restricted - Student Activities	34,334
Reserved - OPEB Trust	4,885,087
Reserved - Capital	1,500,000
Invested in Capital Assets, Net of Related Debt	6,719,823
Total Net Assets	<u>20,629,198</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 25,925,270</u>
	-

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

Valley Collaborative
Interim Statement of Revenues, Expenses and Changes in Net Assets
For the Period Ending June 30, 2024
210 of 210 (100%) School Days

UNAUDITED		
	AMENDED BUDGET	ACTUAL
REVENUES		
Services	\$ 19,600,000	\$ 20,646,468
State Contracts	4,500,000	4,590,023
Other	700,000	663,525
Interest	5,000	59,537
Total Revenues	24,805,000	25,959,553 104.65%
EXPENSES		
Salaries	16,431,226	16,717,809
Employee Benefits	2,935,498	2,797,607
Operating Expenses	2,364,910	2,972,265
Leases & Rentals	593,247	657,562
Depreciation	751,000	796,384
Total Expenses	23,075,881	23,941,627 103.8%
Change in Net Assets - Operating	\$ 1,729,119	\$ 2,017,926
Non Operating Activities		
Return to Member Districts	-	-
Non-Operating Expenses (1)	(1,015,000)	
Change in Net Assets	\$ 714,119	\$ 2,017,926

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

**VALLEY COLLABORATIVE
TREASURER'S REPORT
MAY 31, 2024**

		<u>Beginning Balance</u>	<u>Receipts</u>	<u>Payroll</u>	<u>Accounts Payable</u>	<u>Earnings</u>	<u>Transfers</u>	<u>Ending Balance</u>
ENTERPRISE BANK ACCOUNTS								
Operating	a/c 493426	\$ 3,700,715.20	\$ 2,490,559.57		\$ (175,465.42)		\$ (1,894,900.00)	\$ 4,120,909.35
Payroll	a/c 795823	\$ 515,150.45		\$ (2,264,583.03)			\$ 1,900,000.00	\$ 150,567.42
Joe's Bistro	a/c 531401	\$ 5,745.91	\$ 2,028.92				\$ (5,100.00)	\$ 2,674.83
ICS MMDA	a/c 856490	\$ 4,751.13				\$ 2.01		\$ 4,753.14
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	\$ 114.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 114.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 5,726,477.05</u>	<u>\$ 2,492,588.49</u>	<u>\$ (2,264,583.03)</u>	<u>\$ (175,465.42)</u>	<u>\$ 2.01</u>	<u>\$ -</u>	<u>\$ 5,779,019.10</u>
 MMDT	a/c 0044263747	<u>\$ 1,092,439.09</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 5,101.05</u>	<u>\$ -</u>	<u>\$ 1,097,540.14</u>
 Total Unrestricted Cash		<u>\$ 6,818,916.14</u>	<u>\$ 2,492,588.49</u>	<u>\$ (2,264,583.03)</u>	<u>\$ (175,465.42)</u>	<u>\$ 5,103.06</u>	<u>\$ -</u>	<u>\$ 6,876,559.24</u>
 PARS OPEB Trust		<u>\$ 7,045,309.31</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (2,220.74)</u>	<u>\$ 239,189.37</u>	<u>\$ -</u>	<u>\$ 7,282,277.94</u>
 TOTAL CASH		<u>\$ 13,864,225.45</u>	<u>\$ 2,492,588.49</u>	<u>\$ (2,264,583.03)</u>	<u>\$ (177,686.16)</u>	<u>\$ 244,292.43</u>	<u>\$ -</u>	<u>\$ 14,158,837.18</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JUNE 30, 2024**

		<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	\$ 4,120,909.35	\$ 2,792,681.83		\$ (398,070.19)		\$ (1,450,000.00)	\$ 5,065,520.99
Payroll	a/c 795823	\$ 150,567.42		\$ (1,300,407.85)			\$ 1,450,000.00	\$ 300,159.57
Joe's Bistro	a/c 531401	\$ 2,674.83	\$ 1,507.93					\$ 4,182.76
ICS MMDA	a/c 856490	\$ 4,753.14				\$ 1.95		\$ 4,755.09
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	\$ 114.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 114.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 5,779,019.10</u>	<u>\$ 2,794,189.76</u>	<u>\$ (1,300,407.85)</u>	<u>\$ (398,070.19)</u>	<u>\$ 1.95</u>	<u>\$ -</u>	<u>\$ 6,874,732.77</u>
 MMDT	a/c 0044263747	<u>\$ 1,097,540.14</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,956.17</u>	<u>\$ -</u>	<u>\$ 1,102,496.31</u>
 Total Unrestricted Cash		<u>\$ 6,876,559.24</u>	<u>\$ 2,794,189.76</u>	<u>\$ (1,300,407.85)</u>	<u>\$ (398,070.19)</u>	<u>\$ 4,958.12</u>	<u>\$ -</u>	<u>\$ 7,977,229.08</u>
 PARS OPEB Trust		<u>\$ 7,282,277.94</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (1,973.11)</u>	<u>\$ 93,977.67</u>	<u>\$ -</u>	<u>\$ 7,374,282.50</u>
 TOTAL CASH		<u>\$ 14,158,837.18</u>	<u>\$ 2,794,189.76</u>	<u>\$ (1,300,407.85)</u>	<u>\$ (400,043.30)</u>	<u>\$ 98,935.79</u>	<u>\$ -</u>	<u>\$ 15,351,511.58</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JULY 31, 2024**

		<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	\$ 5,065,520.99	\$ 3,112,166.78		\$ (544,736.34)		\$ (2,325,000.00)	\$ 5,307,951.43
Payroll	a/c 795823	\$ 300,159.57		\$ (1,456,787.73)			\$ 2,325,000.00	\$ 1,168,371.84
Joe's Bistro	a/c 531401	\$ 4,182.76	\$ 1,275.94					\$ 5,458.70
ICS MMDA	a/c 856490	\$ 4,755.09				\$ 2.01		\$ 4,757.10
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	\$ 114.36	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 114.36
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 6,874,732.77</u>	<u>\$ 3,113,442.72</u>	<u>\$ (1,456,787.73)</u>	<u>\$ (544,736.34)</u>	<u>\$ 2.01</u>	<u>\$ -</u>	<u>\$ 7,986,653.43</u>
 MMDT	a/c 0044263747	<u>\$ 1,102,496.31</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 5,145.19</u>	<u>\$ -</u>	<u>\$ 1,107,641.50</u>
 Total Unrestricted Cash		<u>\$ 7,977,229.08</u>	<u>\$ 3,113,442.72</u>	<u>\$ (1,456,787.73)</u>	<u>\$ (544,736.34)</u>	<u>\$ 5,147.20</u>	<u>\$ -</u>	<u>\$ 9,094,294.93</u>
 PARS OPEB Trust		<u>\$ 7,374,282.50</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (1,995.10)</u>	<u>\$ 179,154.61</u>	<u>\$ -</u>	<u>\$ 7,551,442.01</u>
 TOTAL CASH		<u>\$ 15,351,511.58</u>	<u>\$ 3,113,442.72</u>	<u>\$ (1,456,787.73)</u>	<u>\$ (546,731.44)</u>	<u>\$ 184,301.81</u>	<u>\$ -</u>	<u>\$ 16,645,736.94</u>



VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
7/1/2023 to 6/30/2024

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

Account Summary

Source	Beginning Balance as of 7/1/2023	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 6/30/2024
OPEB	\$6,598,707.00	\$0.00	\$796,874.10	\$21,298.60	\$0.00	\$0.00	\$7,374,282.50
Totals	\$6,598,707.00	\$0.00	\$796,874.10	\$21,298.60	\$0.00	\$0.00	\$7,374,282.50

Investment Selection

Source	
OPEB	Target Index Balanced Strategy

Investment Objective

Source	
OPEB	Dual goals are to provide a moderate amount of current income with moderate capital growth.

Investment Return

Source	1-Month	3-Months	1-Year	Annualized Return			Plan's Inception Date
				3-Years	5-Years	10-Years	
OPEB	1.29%	1.45%	12.12%	1.87%	6.75%	-	6/24/2015

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

Past performance does not guarantee future results. Performance returns may not reflect the deduction of applicable fees, which could reduce returns. Information is deemed reliable but may be subject to change.
Investment Return: Annualized rate of return is the return on an investment over a period other than one year multiplied or divided to give a comparable one-year return.
Account balances are inclusive of Trust Administration, Trustee and Investment Management fees



VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
5/1/2024 to 5/31/2024

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

Account Summary

Source	Beginning Balance as of 5/1/2024	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 5/31/2024
OPEB	\$7,045,309.31	\$0.00	\$239,189.37	\$2,220.74	\$0.00	\$0.00	\$7,282,277.94
Totals	\$7,045,309.31	\$0.00	\$239,189.37	\$2,220.74	\$0.00	\$0.00	\$7,282,277.94

Investment Selection

Source

OPEB Target Index Balanced Strategy

Investment Objective

Source

OPEB Dual goals are to provide a moderate amount of current income with moderate capital growth.

Investment Return

Source	1-Month	3-Months	1-Year	Annualized Return			Plan's Inception Date
				3-Years	5-Years	10-Years	
OPEB	3.40%	2.40%	14.46%	1.83%	7.33%	-	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 Program

Account Report for the Period
6/1/2024 to 6/30/2024

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

Account Summary

Source	Beginning Balance as of 6/1/2024	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 6/30/2024
OPEB	\$7,282,277.94	\$0.00	\$93,977.67	\$1,973.11	\$0.00	\$0.00	\$7,374,282.50
Totals	\$7,282,277.94	\$0.00	\$93,977.67	\$1,973.11	\$0.00	\$0.00	\$7,374,282.50

Investment Selection

Source	
OPEB	Target Index Balanced Strategy

Investment Objective

Source	
OPEB	Dual goals are to provide a moderate amount of current income with moderate capital growth.

Investment Return

Source	1-Month	3-Months	1-Year	Annualized Return			Plan's Inception Date
				3-Years	5-Years	10-Years	
OPEB	1.29%	1.45%	12.12%	1.87%	6.75%	-	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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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
7/1/2024 to 7/31/2024**

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

Account Summary

Source	Beginning Balance as of 7/1/2024	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 7/31/2024
OPEB	\$7,374,282.50	\$0.00	\$179,154.61	\$1,995.10	\$0.00	\$0.00	\$7,551,442.01
Totals	\$7,374,282.50	\$0.00	\$179,154.61	\$1,995.10	\$0.00	\$0.00	\$7,551,442.01

Investment Selection

Source

OPEB **Target Index Balanced Strategy**

Investment Objective

Source

OPEB Dual goals are to provide a moderate amount of current income with moderate capital growth.

Investment Return

Source	1-Month	3-Months	1-Year	Annualized Return			Plan's Inception Date
				3-Years	5-Years	10-Years	
OPEB	2.43%	7.28%	12.36%	2.33%	7.17%	-	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

June 30, 2024

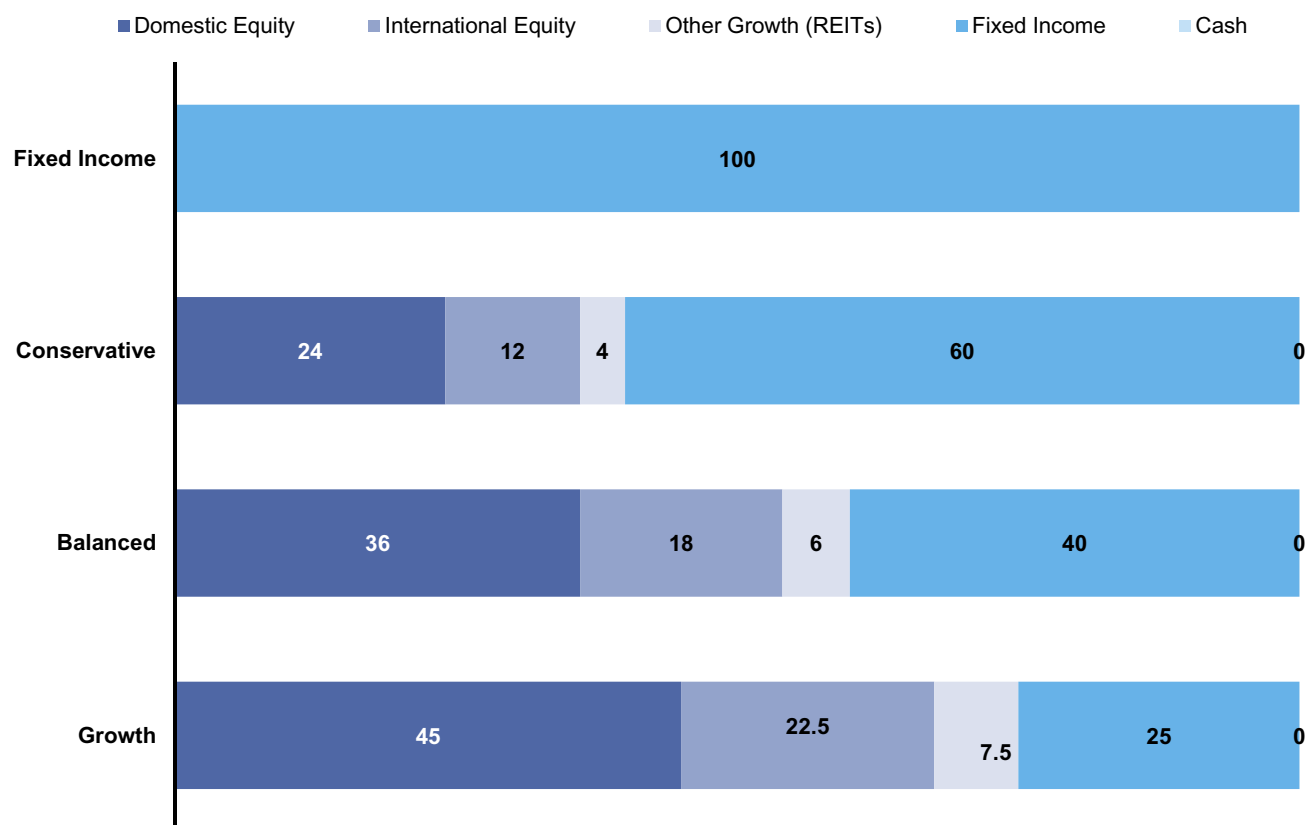
PARS Target OPEB Trust Program



Strategy	Asset Class	Target	Annualized Total Rate of Return		
			Portfolio	2Q24*	Inception-to-Date**
Fixed Income	Equity	0%	Portfolio	0.31	0.31
	Fixed Income	100%	Benchmark	0.16	0.16
Conservative	Equity	40%	Portfolio	1.32	1.32
	Fixed Income	60%	Benchmark	0.98	0.98
Balanced	Equity	60%	Portfolio	1.40	1.40
	Fixed Income	40%	Benchmark	1.39	1.39
Growth	Equity	75%	Portfolio	1.69	1.69
	Fixed Income	25%	Benchmark	1.70	1.70

*Returns for periods under one year are not annualized. Returns are gross of investment management fees and net of fund embedded fees. Please see important disclosures on the following page, and your U.S. Bank fee schedule for investment management fees applied to your specific portfolio, as net of fee performance will differ.

** Inception date is April 1, 2024.



Target - Holdings:

Portfolios are invested in passive index-based investment vehicles.

Fidelity Total Stock Market Index Fund
 First American Government Obligations Fund
 iShares Core MSCI Total International Stock ETF
 iShares Core US Aggregate Bond ETF
 iShares Global Infrastructure ETF
 iShares 5-10 Year Investment Grade Corporate
 ETFSPDR High Yield Bond ETF
 Vanguard Real Estate ETF

Benchmark Definitions				
	Fixed Income	Conservative	Balanced	Growth
Russell 3000	0.00%	24.00%	36.00%	45.00%
MSCI ACWI Ex-US	0.00%	12.00%	18.00%	22.50%
MSCI-US REIT	0.00%	2.00%	3.00%	3.75%
MSCI World Core Infrastructure	0.00%	2.00%	3.00%	3.75%
Bloomberg US Aggregate	91.50%	54.50%	36.00%	22.00%
ICE BofA High Yield Master II	7.50%	4.50%	3.00%	2.00%
FTSE 1 Month T-Bill	1.00%	1.00%	1.00%	1.00%

About the Adviser: PFM Asset Management (PFMAM)

At PFM Asset Management we partner with public sector, non-profit and other institutions to build tailored, flexible investment solutions using fixed income and multi-asset class investments. With more than 40 years of experience managing public sector clients, we offer liquidity management, investment-grade fixed income, outsourced chief investment officer (OCIO) and other specialized investment solutions.

Gross returns are time weighted and are calculated based on trade-date accounting. Actual returns for each agency's participation within the portfolio may vary from returns shown based on each agency's own cash flows as well as the specific portfolio in which they are invested. U.S. Bank National Association has retained its affiliate, PFM Asset Management LLC ("PFMAM"), as its sub-advisor to provide investment management services. Prior to January 1, 2024, HighMark Capital Management ("HighMark") acted as sub-advisor to the portfolios. HighMark, including clients and investment personnel, was consolidated into PFMAM on January 1, 2024.

PFM Asset Management LLC ("PFMAM") is an investment adviser registered with the U.S. Securities and Exchange Commission and a subsidiary of U.S. Bancorp Asset Management, Inc. ("USBAM"). USBAM is a subsidiary of U.S. Bank National Association ("U.S. Bank"). U.S. Bank is a separate entity and subsidiary of U.S. Bancorp. U.S. Bank is not responsible for and does not guarantee the products, services or performance of PFMAM.

U.S. Bank pays PFMAM up to 67% of the annual management fee for assets sub-advised by PFMAM under its sub-advisory agreement with U.S. Bank. Refer to your U.S. Bank fee schedule for investment management fees applied to your specific portfolio. U.S. Bank compensates PFMAM for these services from its own fees.

NOT FDIC INSURED : NO BANK GUARANTEE : MAY LOSE VALUE



Central Administration

11 Executive Park Drive, N. Billerica, MA 01862 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Ph.D., Executive Director
Date: September 12, 2024
Re: Enrollment

Please find attached the enrollment numbers for September 2024. We have 249 students enrolled currently. In September 2023, enrollment was 253 students. In June 2024, enrollment was 269.

FY24 September Active Students by Program

As of 2024-09-10 13:19:29 Eastern Standard Time/EST • Generated by Patricia Sicard

Filtered By

Show: All students

Fiscal Year equals FY24

Fiscal Year Date of Termination greater than 9/1/2023

Fiscal Year Date of Entry less than 9/30/2023

Billing District: District Name not equal to A Member

Billing District: District Name not equal to A MA NonMember

Billing District: District Name not equal to A NH NonMember

Collaborative School: School Name ↑	Program ↑	Record Count
Valley Elementary School	ES EBS	5
	ES EBS ISN	44
	ES EBS ISN EE	1
	ES PSB	3
	ES PSB ISN	24
	ES PSB ISN EE	1
Subtotal		78
Valley High School	HS Alternative	31
	HS Alternative ISN	1
	HS Alternative EE	2
	HS Alternative Vocational	13
	HS Alternative Vocational EE	1
	HS School Life Skills Training	24
	HS School Life Skills Training ISN	18
	HS School Vocational Training	30
	HS School to Work	14
Subtotal		134
Valley Middle School	MS EBS	7
	MS EBS ISN	10
	MS EBS EE	1
	MS PSB	10
	MS PSB ISN	7
	MS School Life Skills Training ISN	6
Subtotal		41
Total		253

FY24 Student Enrollment by Program June 2024

As of 2024-09-10 13:12:40 Eastern Standard Time/EST • Generated by Patricia Sicard • Sorted by Status (Descending)

Filtered By

Show: All students

Fiscal Year equals FY24

Fiscal Year Date of Termination greater than 6/19/2024

Fiscal Year Date of Entry less than 6/1/2024

Billing District: District Name not equal to A Member

Billing District: District Name not equal to A MA NonMember

Billing District: District Name not equal to A NH NonMember

Collaborative School: School Name ↑	Program ↑	Current Grade ↑	Record Count
Valley Elementary School	ES EBS	3	1
		4	2
		5	2
	Subtotal		5
	ES EBS ISN	K	5
		1	5
		2	11
		3	10
		4	11
		5	7
		6	2
	Subtotal		51
	ES EBS ISN EE	K	1
	Subtotal		1
	ES PSB	3	1
		4	1
		5	1
	Subtotal		3
	ES PSB ISN	K	1
		1	5
		2	6
		3	3
		4	7
		5	2
		6	5
	Subtotal		29
	ES PSB ISN EE	3	1
	Subtotal		1
Subtotal			90
Valley High School	HS Alternative	9	8
		10	8
		11	7
		12	10
	Subtotal		33
	HS Alternative ISN	9	1
	Subtotal		1
	HS Alternative EE	11	1
	Subtotal		1
	HS Alternative Vocational	10	1
11		7	

		12	9
	Subtotal		17
	HS Alternative Vocational EE	12	1
	Subtotal		1
	HS School Life Skills Training	9	3
		10	1
		11	1
		12	4
		SP	12
		PG	1
	Subtotal		22
	HS School Life Skills Training ISN	9	2
		10	3
		11	2
		12	1
		SP	8
	Subtotal		16
	HS School Vocational Training	9	2
		10	1
		11	8
		12	3
		SP	12
	Subtotal		26
	HS School to Work	9	2
		10	2
		11	4
		12	2
		SP	5
	Subtotal		15
	Subtotal		132
Valley Middle School	MS EBS	6	3
		7	2
		8	8
	Subtotal		13
	MS EBS ISN	6	3
		7	3
		8	2
	Subtotal		8
	MS EBS EE	7	1
	Subtotal		1
	MS PSB	6	3
		7	4
		8	5
	Subtotal		12
	MS PSB ISN	6	3
		8	3
	Subtotal		6
	MS School Life Skills Training ISN	5	1
		6	3
		7	2
		8	1
	Subtotal		7
	Subtotal		47
	Total		269

FY25 Student Enrollment by Program

As of 2024-09-11 08:44:34 Eastern Standard Time/EST • Generated by George Pylotis • Sorted by Status (Descending)

Filtered By

Show: All students

Fiscal Year equals FY25

Fiscal Year Date of Termination greater than TODAY

Fiscal Year Date of Entry less than TODAY

Billing District: District Name not equal to A Member

Billing District: District Name not equal to A MA NonMember

Billing District: District Name not equal to A NH NonMember

Collaborative School: School Name ↑	Program ↑	Record Count
Valley Elementary School	ES EBS	4
	ES EBS ISN	42
	ES PSB	3
	ES PSB ISN	29
Subtotal		78
Valley High School	HS Alternative	35
	HS Alternative ISN	1
	HS Alternative EE	1
	HS Alternative Vocational	13
	HS Alternative Vocational EE	1
	HS School Life Skills Training	27
	HS School Life Skills Training ISN	13
	HS School Vocational Training	25
	HS School to Work	16
Subtotal		132
Valley Middle School	MS EBS	7
	MS EBS ISN	7
	MS EBS EE	1
	MS PSB	8
	MS PSB ISN	5
	MS PSB EE	1
	MS School Life Skills Training ISN	10
Subtotal		39
Total		249



Central Administration

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MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Ph.D., Executive Director
Date: September 12, 2024
Re: Valley Collaborative Central Office Updates

Valley Collaborative has been inundated with audits over the last three months. Our small but mighty team excels under pressure and tight timelines. Here's an update:

- **DDS CORI Audit**
 - For the first time, on September 24, 2024 DDS is performing a CORI audit to ensure Valley Collaborative is in compliance with all procedures and protocols. We are confident that we are in full compliance.
- **DESE Collaborative Financial Review**
 - Valley Collaborative still has not received the draft results from the DESE Collaborative Financial Review performed by MARCUM Accounting for DESE in May 2024. The Department continues to work through some technical matters regarding how certain DESE guidance and regulations are being interpreted by Collaboratives across the Commonwealth. It is not clear when we will have a draft version to review. I will keep the Board updated as things progress. Valley is proud to be a thought partner and the pilot site for this new financial review process that all Collaboratives will be undergo every six years.
- **DESE Coordinated Program Review – Mid-Cycle Review**
 - Valley is undergoing its Mid-Cycle Review. We are in the process of submitting our self-assessment. All materials are due on September 20th. DESE will perform the onsite portion of this review the week of November 4th.
- **FY'24 Independent Financial Audit**
 - Valley's FY'24 Independent Financial Audit, performed by Fritz DeGuglielmo, LLC, is underway. Daniel Schaffner and his team will be on site next week. As the Board is aware, Valley had another financially successful year in FY'24. Valley Collaborative's operating budget is now \$25M. Our systems and processes have never been more effective. Daniel Schaffner will report out to the Board at the November 21, 2024 Board of Directors meeting.
- **5-year Lease Extension with the Middlesex Retirement Board – 25 Linnell Circle**
 - For many years now, Valley has enjoyed a very successful partnership with the Middlesex Retirement Board. They have graciously and always supported Valley's mission and vision. For example, if the Board so chooses, Middlesex Retirement Board is willing to provide Valley with additional recreational areas outside in order to establish basketball courts for students in the next lease renewal. Valley's current 5-year lease with the Middlesex Retirement Board is set to expire

on June 30, 2025. I have met with the Executive Director of the Middlesex Retirement Board and their Board Chair in order to determine if they were interested in having another five-year lease with Valley Collaborative. They are very welcoming of the idea of Valley relocating its Middle School to their facility. As the Board may recall, Middlesex Retirement Board is an intergovernmental agency and therefore, Valley does not have to go out to bid for this lease. I am asking the Board permission to work with attorney Lent to bring forward a lease extension of five years for the Board's approval.

- **Vehicle Replacement Strategy Update**

As previously discussed with the Board in FY'24, Valley is aggressively updating its transportation fleet. Valley's fleet consists of 44 passenger vans, 3 pickup trucks, and 3 trailers. Valley has historically held \$250,000 in its 990 Capital Improvements Budget for our fleet replacement strategy. However, during COVID it was difficult to obtain vehicles and as a result, a portion of Valley's fleet is older than the five-year target date. For example, in 2021 and 2022, Valley was only able to obtain four vehicles during that time period.

As such, I am requesting an additional \$300,000 making the total \$550,000 for the FY'25 990 Capital Improvement Budget for our fleet replacement strategy. This summer Valley spent the \$250,000 line item by purchasing five passenger vans and a pickup truck. The additional \$300,000 will allow Valley to obtain five 2024 Ford Transit passenger vans to replace 2017 passenger vans which are currently out of warranty.

Required Action:

- Vote to approve Negotiations with Middlesex Retirement Board Lease Extension - 25 Linnell Circle
- Vote to approve additional funding for FY'25 Vehicle Replacement Strategy

Attachments:

- None



Central Administration

11 Executive Park Drive, N. Billerica MA 01862 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 12, 2024
Re: Annual Approval of the Today & Tomorrow Program Handbook and Policies & Procedures Manual

The Board of Directors approves the Today & Tomorrow Program Handbook and Policies & Procedures Manual annually as it does the Student & Family Handbook and Policies & Procedures Manual.

This year, there was no substantial change noted.

Required Action:

- Vote Today & Tomorrow Program Handbook and Policies & Procedures Manual

Attachments:

- Today & Tomorrow Program Handbook and Policies & Procedures Manual



Today & Tomorrow Program Handbook and Policies & Procedures Manual

11 Executive Park Drive
North Billerica, MA 01862
www.valleycollaborative.org
Tel: (978) 528-7826
Fax (978) 663-0759

*Updated and Approved by the Board of Directors of Valley Collaborative on September 14, 2023.

TABLE OF CONTENTS	PAGE
INTRODUCTION	
Introduction	3
About the Collaborative	4
Mission Statement/Vision Statement.....	5
2023-2024 Program Calendar	6
GENERAL PROGRAM POLICIES AND PROCEDURES	
Program Closings	8
Early Release	9
Observation Policy	10
Program Visitor Procedures	10
Release of Individual Other than Guardian.....	10
Attendance Policy	10
Whole Program or Community Emergencies	11
Emergency Evacuation Safety Plan	11
Written Notification and Communication.....	12
Individual Records.....	13
Access to Individual Records.....	14
Access to Records and Record Privacy	14
Records for Individuals No Longer Enrolled	17
Reporting Abuse and Neglect	17
Immediate Notification	18
Guardian Consent and Notification	19
Change of Legal Status	19
Complaints and Grievances	19
Program Oversight	20
Individual Referral and Admissions.....	20
Placement Meeting	21
Service Agreements	21
INDIVIDUAL POLICIES	
Rights of Individuals	22
Responsibilities of Individuals	23
Individual Code of Conduct.....	24
Nondiscrimination, Civil Rights, and Due Process	24
Prohibited Conduct	24
Commitment to Prevention and Investigation.....	25
Procedures for Responding to and Investigating Incidents	25
Consequences for Civil Rights Violations	26
Commitment to Non-Retaliation	26
Referral to Law Enforcement Authorities.....	26
Documentation Requirements	27
Dissemination of Information and Training	27
Individual Guidelines	28

Internet Use 30

MEDICAL POLICIES

Special Medical Conditions 31

Communicable Disease 32

Dismissal from Program due to Illness 33

Hospital Re-Entry 33

INDIVIDUAL SERVICE PLAN

Individual Service Plan Development and Implementation 34

Progress Reports..... 34

Assessments..... 35

STAFF EXPECTATIONS

Staff Expectations..... 36

Appendix A: Individual Binder Contents

Appendix B: Admissions Checklist

Appendix C: Work Site Dress Code

Appendix D: Health Services Manual

Appendix E: ISP Timeline

Appendix F: Assessment of Functional Living Skills

Appendix G: Person Centered Plan

Appendix H: DDS Program Worker Trainee Disclosure Form

INTRODUCTION

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

Valley Collaborative's Today and Tomorrow Program provides individuals the opportunity to be "Worker Trainees" within the Group Supported Employment model. For the purposes of this Handbook, the word "Individual" shall mean the Today & Tomorrow Program participant referred to Valley Collaborative Adult Services Department by a Health and Human Services Agency.

By enrolling in Valley Collaborative's Today and Tomorrow Program, individuals will have the opportunity to work in a group supported employment setting as a "Worker Trainee" supported by Valley Collaborative staff and to earn a stipend equivalent to the hourly minimum wage in Massachusetts. Also, and as defined by the Massachusetts Department of Unemployment Assistance, individuals may not be eligible for unemployment benefits if the only source of employment is from working as a worker trainee in a program run by a nonprofit or public institution (i.e. Valley Collaborative).

Individuals enrolled in the Today and Tomorrow Program are not an employee of Valley Collaborative, or any other organization where they participate in Group Supported Employment. As such, individuals will not receive the employee benefit package offered by Valley Collaborative or the businesses where they participate in Group Supported Employment as a worker trainee program does not meet the eligibility requirements of employment. As such, "Worker Trainees" are not eligible for employee benefits such as paid leave, holiday pay, vacation time, workers compensation, unemployment insurance, state pension, etc.

About the Collaborative

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

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

The Collaborative's Today & Tomorrow Programs offer opportunities for Individuals to work in the community with supports funded through Department of Developmental Services, Massachusetts Rehabilitation Commission, and Massachusetts Commission for the Blind.

Mission Statement

The mission of the Valley Collaborative Adult Services Department is to empower Individuals to navigate confidently and with optimal independence in their community by promoting lifelong learning and self-direction of services.

Vision Statement

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



2024 - 2025 Calendar

Adult Services
Today & Tomorrow Program

July 2024							August 2024							September 2024						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6					1	2	3	1	2	3	4	5	6	7
7	8	9	10	11	12	13	4	5	6	7	8	9	10	8	9	10	11	12	13	14
14	15	16	17	18	19	20	11	12	13	14	15	16	17	15	16	17	18	19	20	21
21	22	23	24	25	26	27	18	19	20	21	22	23	24	22	23	24	25	26	27	28
28	29	30	31				25	26	27	28	29	30	31	29	30					
October 2024							November 2024							December 2024						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5						1	2	1	2	3	4	5	6	7
6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14
13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21
20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28
27	28	29	30	31			24	25	26	27	28	29	30	29	30	31				
January 2025							February 2025							March 2025						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4							1							1
5	6	7	8	9	10	11	2	3	4	5	6	7	8	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22	16	17	18	19	20	21	22
26	27	28	29	30	31		23	24	25	26	27	28		23 / 30	24 / 31	25	26	27	28	29
April 2025							May 2025							June 2025						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5					1	2	3	1	2	3	4	5	6	7
6	7	8	9	10	11	12	4	5	6	7	8	9	10	8	9	10	11	12	13	14
13	14	15	16	17	18	19	11	12	13	14	15	16	17	15	16	17	18	19	20	21
20	21	22	23	24	25	26	18	19	20	21	22	23	24	22	23	24	25	26	27	28
27	28	29	30				25	26	27	28	29	30	31	29	30					
Professional Development Day All Staff - No Today & Tomorrow Program														239 Total Program Days						
Holiday/Break - No Today & Tomorrow Program																				
Early Release - 11:00am																				
Board of Directors Meeting (Regular School Day for Staff and Students)																				

2024 - 2025 PROGRAM YEAR

List of Holidays or Closings

July 4, 2024	Fourth of July
September 2, 2024	Labor Day
September 3, 2024	Professional Development Day
October 14, 2024	Columbus Day
November 11, 2024	Veterans Day
November 28, 2024	Half Day
November 28 - 29, 2024	Thanksgiving Break
Dec. 20, 2024 - Jan. 1, 2025	Winter Break
January 20, 2025	Martin Luther King Day
February 17, 2025	Presidents Day
April 18, 2025	Good Friday
April 21, 2025	Patriots' Day
May 26, 2025	Memorial Day
June 19, 2025	Juneteenth

GENERAL PROGRAM POLICIES AND PROCEDURES

Program Closing Announcements

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

Program Closings

In the event of inclement weather or an emergency, the Today & Tomorrow Program will be closed.

- 40 Linnell Circle, Billerica, MA
- 11 Executive Park Drive, North Billerica, MA

Early Release

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

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

Observation Policy

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

Program Visitor Procedures

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

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

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

Release of Individual Other than Guardian

The Today & Tomorrow Program will not allow anyone other than the Individual/guardian to dismiss from the Program without prior notification. If a guardian wants a relative, friend, or care provider to pick up an Individual from the Program, the guardian must give permission to the Director of DDS Services. If a guardian calls, the Program must verify that it was

the guardian making the call. The Individual must be signed out by the guardian/relative/provider before the Program will release the Individual.

Attendance Policy

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

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

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

Whole Program or Community Emergencies

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

Emergency Evacuation Safety Plan

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

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

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

Written Notification and Communication

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

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

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

Program Coordinator: Distribution of reports; scheduling meetings; distribution of attendance records; ISP implementation, development, updates; and progress reports; behavior implementation plans/functional behavioral assessments; filing of an incident or DPPC report.

Case Manager: Distribution of reports; scheduling meetings; distribution of attendance records; ISP implementation, development, updates; and progress reports; behavior implementation plans/functional behavioral assessments; filing of an incident or DPPC report.

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

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

Individual Records

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

Valley Collaborative maintains legal and Program Services binders for all Individuals in the Today & Tomorrow Program. Please see Appendices A and B.

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

- Identifying Information including but not limited to Individual's full name, Social Security number, religious preference (if disclosed voluntarily), language, health and insurance information, identification of family and/or guardians including addresses and phone number(s), legal competency status including guardianship documents, a list of providers current and from previous 2 years, and employment history.
- Emergency Information including but not limited to a photograph taken within 5 years after age 18 and/or marked change in Individual's appearance, name (including nicknames), age, general physical characteristics, contact information of legal guardian, emergency contact information, health insurance information, relevant abilities and behavior characteristics, list of allergies and medications, pattern of movement (if lost previously), likely response to search efforts, places frequented, physician(s) information, contact information for service coordinator and other providers if applicable.
- Current assessment reports
- ISP
- Medical Information including recent physical and dental exams, special diet, record of medical protocols

- including occurrence log, and list of health conditions requiring ongoing management
- Incident Reports
- Behavior Modification Plans
- Referral/Transfer Information
- Record Access Log
- Progress Notes
- Medication Information
- Human Rights Trainings

Access to Individual Records

The following Program personnel are authorized to access Individual records:

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

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

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

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

4.06: Access to Records and Record Privacy

(1) Access or Inspection by the Individual, Guardian, or Representative.

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

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

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

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

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

-A record of such authorization shall be included in the Individual's record.

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

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

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

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

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

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

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

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

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

-Staff of providers proposed to provide habilitation services to the Individual in the near future;

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Privacy and Security of Individual Records

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

Records for Individuals No Longer Enrolled

The Program Coordinators will keep the Individual records for a minimum of three years from the Individual's exit date from the Program.

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

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

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

Reporting Abuse and Neglect – Disabled Persons Protection Commission

As mandated reporters, Collaborative employees are required to file a complaint per 115 CMR 9.00 guidelines when there is believed to be a non-frivolous allegation of mistreatment, an illegal, dangerous, or inhumane condition or incident, or a

medicolegal death of an Individual. It is also mandated to file a report with DPPC under M.G.L 19C if there is reason to believe serious harm either physical or emotional has been inflicted to an Individual.

Immediate Notification

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

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

Guardian Consent and Notification

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

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

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

Change of Legal Status

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

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

Complaints and Grievances

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

Step 1

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

Step 2

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

Step 3

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

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

Program Oversight-DDS

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

Individual Referral and Admissions

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

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

Placement Meeting

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

Service Agreements

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

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

1. The Today & Tomorrow Program shall allow state agency to conduct announced and unannounced site visits and to review all documents and Program.
2. The Today & Tomorrow Program shall afford all applicable legal requirements of the regulations and applicable policy statements and directives issued by both federal and state health and human service agencies.

The Today & Tomorrow Program assures the state agencies that it does not deny an Individual access to its programs or services on the grounds of race, color, age, disability, gender, gender identity, religion, national origin, or sexual orientation.

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

Rights of Individuals

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

Individuals have the right to:

Receive services and supports provided in a manner that promotes:

- Human Dignity
- Humane and adequate care and treatment
- Self-determination and freedom of choice to the Individual's fullest capability

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

Responsibilities of Individuals

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

Individuals have the responsibility to:

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

Individual Code of Conduct

Nondiscrimination, Civil Rights, and Due Process

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

Prohibited Conduct

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

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

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

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

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

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

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

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

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

Commitment to Prevention and Investigation

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

Procedures for Responding to and Investigating Incidents

All instances of civil rights violations, witnessed or suspected, must be reported to the Program Coordinator or Director of DDS Services.

Any Individual coming forward to report a civil rights violation he or she has experienced will be directed to the Program Coordinator or Director of DDS Services, following any emergency needs being attended to. Consideration will be given to whether any immediate or interim steps are necessary to ensure the safety of and avert retaliation of the complainant.

- The investigation must determine whether a civil rights violation has in fact occurred.
- The investigation must include preservation and gathering of evidence from the scene of an incident. For example, bias-related notes will be copied.
- The investigation will include interviewing victims and witnesses as soon as possible, as well as others who may have relevant knowledge.
- The investigation may include other methods and documents deemed relevant and useful.
- All interviews and evidence should be carefully evaluated for the presence of bias indicators that would characterize the matter as a civil rights violation.
- The investigation will conclude with a finding as to whether a civil rights violation has or has not occurred.

Consequences for Civil Rights Violations

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

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

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

Commitment to Non-Retaliation

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

Referral to Law Enforcement Authorities

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

Documentation Requirements

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

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

Dissemination of Information and Training

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

Individual Guidelines

Attendance and Tardiness: Individuals are encouraged to attend the Program on all days and on time. The Individual or caretaker are expected to let staff know prior to 6:00 A M if an Individual will not be attending the Program that day, or will be tardy/dismissed. Individuals/Guardians are to call the Program Dispatcher at 978-799-7358 for Individuals who will not be using Collaborative transportation for that day. If an individual is absent or tardy and no phone call is made, a call will be made to the individual's home. Individuals who are tardy will be allowed to join the Program day as long as they arrive before 11:00AM. Individuals leaving the Program early will be allowed to do so as long as it is after 11:00AM. This policy may be adjusted based on unforeseen medical needs. Excessive unscheduled absences, dismissals, and tardiness are unacceptable.

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

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

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

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

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

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

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

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

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

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

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

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

Internet Use

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

Authorized Use

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

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

Unauthorized Use

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

- Offensive content of any kind, including pornographic material.

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

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

MEDICAL POLICIES

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

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

Please see Appendix E.

Special Medical Conditions

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

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

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

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

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

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

Communicable Disease

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

Communicable Disease	Requirements
Bacterial Conjunctivitis	May return to the Program after medical treatment has been provided for 24 hours.
Chicken Pox	May return to the Program after all lesions have dried and crusted or one week from appearance of first eruption.
Coronavirus	May return to the Program 5 days after positive test assuming symptoms have subsided.
Measles	May return to the Program four days after first appearance of rash.
Impetigo	May return to the Program after all open sores have healed or is small enough that a Band-Aid will cover the entire area.
Strep Throat	May return to the Program after antibiotic treatment has been given for 24 hours.
Ringworm	May return to the Program after treatment with antifungal cream has begun; lesions should be covered.
Pediculosis /Scabies	May return to the Program when treated; scabies must be treated with anti-parasitic for 24 hours before Individual may return to work or after one treatment.

Dismissal from Program due to Illness

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

- Has returned from a hospital admission within the past 24 hours. This does not include routine tests or minor injuries. The Individual will remain at home for observation for the first 24 hours.
- Has a temperature of 100.5 degrees tympanic (by ear). Temperature must be 98.6 for a full 24 hours prior to returning to the Program. The exception is an Individual with a hypothalamic problem (temperature regulation

problem) and is symptom free. Each case will be discussed individually.

- Has an infectious disease (Strep Throat/Pneumonia, etc.) and has not been on antibiotic therapy for 24 hours or as designated by MD.
- Eye drainage yellow/green in color with pink or red eyes, eyelids, etc.
- Any undiagnosed rash.
- Has a culture(s) pending (exceptions can be made at the discretion of the nurse).
- Is on respiratory precautions, cough/cold or has a significant change in respiratory secretions (green/yellow nasal drainage).

Hospital Re-Entry

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

1. Any Individual who has required a psychiatric evaluation, and emergency room visit or had been placed in inpatient hospitalization will be readmitted to their respective Program upon collaboration with their treatment planning team.
2. The Individual can return to the Program with the receipt of a signed discharge summary from the hospital/clinician providing treatment and medical clearance from his/her medical provider.
3. This summary will ensure that the most recent and credible information regarding treatments, goals and restrictions are relayed back to the Program and allow for a smooth transition.

The plan should include, in writing, any changes in medications, medical procedure, and any follow-up plans with clinicians, therapists, and any other treatment providers.

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

INDIVIDUAL SERVICE PLAN (ISP) PROCESS

ISP Development and Implementation

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

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

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

Progress Reports

All Collaborative Programs will complete Semi-Annual Progress Reports two times each year. In all cases the Semi-Annual Progress Reports will be submitted in HCSIS and sent to the Service Coordinator and will be kept on file at the Collaborative.

Annual Progress Reports will report to guardians the progress of each ISP goal individually. Service providers must comment on whether they anticipate the Individual being able to meet the goal by the end of the ISP period. If they believe that the Individual will be unable to meet the goal, that must be indicated on the Progress Report and a Team Meeting must be held to amend the ISP. Progress Reports must answer two questions for each goal:

- (1) What is the Individual's progress toward the annual goal and
- (2) Is the progress sufficient to enable the Individual to achieve the goal by the end of the ISP period?

Information included on the Annual/Semi-Annual Progress Reports will be derived from data collected throughout the reporting period. Copies of Progress Reports will be maintained in the Individuals' records.

Please see Appendix E for ISP Timeline

Assessments

All Individuals in the Today & Tomorrow Program are given the Assessment of Functional Living Skills (AFLS) assessment upon starting the program and then annually. This assessment measures safety, adaptive living skills and work readiness. This helps to develop an Individual's Person Centered Plan which focuses on four domains. This includes Community Living, Employment, Adaptive Living Skills and Quality of Life. This is also reviewed annually with the Individual as part of the ISP process.

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

STAFF EXPECTATIONS

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

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

All Valley Collaborative staff are expected to:

- Follow all policies and procedures, manuals, and handbooks as outlined.
- Behave in a professional manner at all times while on the Program premises or at a function at which the staff is a representative of the Collaborative.
- Conduct day-to-day activities in a safe, responsible manner, and avoid situations that may endanger the safety of others.
- Maintain the security of confidential information. Unauthorized disclosure of confidential information is forbidden.
- No smoking or other use of tobacco products and no illegal or unauthorized drugs or alcohol at any Collaborative Program, field trip or function.

- Provide accurate and non-judgmental information on all Program records and reports.
- Regularly report to work on time, and give notification of any absences in a prompt and responsible manner in accordance with Collaborative policies and procedures.
- Complete assignments accurately and in a timely manner.
- Utilize only Collaborative-sanctioned modes of communication with Individuals and follow all applicable laws, regulations, and Collaborative policies. This includes complying with the social media policy in the Valley Collaborative Employee Handbook.
- Support and advocate for the rights of all Individuals in the Program.

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

[End of Handbook]

Individual: _____

ISP/LP Month: _____

**Individual File- Today & Tomorrow Program, Valley Collaborative
Table of Contents**

Front Pocket

- Emergency Fact Sheet
- Access Log

I. Identifying Information

1. Copies of identification Cards (ID, Health Insurance, Social Security, Passport, Birth Certificate, etc.) as applicable or available
2. Intake Info (Referral Packet, SRF, etc.)
3. Search Plan

II. Service Planning

4. Current ISP/ LP Packet
5. ISP Assessments (Annual Progress Summaries, Safety, Semi-Annual Progress Summaries)
6. Provider Support Agreement, Goal 1- "Work"
 - a. Monthly notes (if 3168 applicable)
7. Provider Support Agreement, Goal 2- "CBDS"
8. Assistive Technology Assessment

III. Vocational Information

9. Current T&T Schedule
10. Vocational Assessments (Person-Centered Plans, Worksite Surveys, AFLS, Resume)
11. Financial Information (Direct Deposit Info, I9, M4, W4, etc.)
12. Misc. Vocational Information/ Correspondence (Specific Employer Info, Trainings, etc.)

IV. Health & Medical Information

13. Health Packet
14. Annual Physical & Dental
15. Medication Sheet
16. Immunization Records
17. Specific Health Protocols (if applicable)
18. Misc. medical paperwork/ assessments (if applicable)

V. Legal Information

19. Current Consent Forms
 - b. Release of Information Form
 - c. Photo/ Media Releases
 - d. Transportation/ Home Alone Form
 - e. Worksite-Specific Consents (if applicable)
 - f. Other Misc. Consent Forms
20. Documentation of Annual Trainings (HR, Safety, etc.)
21. Guardianship & Roger's Monitor Info (if applicable or available)
22. Incident Reports (All)
23. Misc. Legal Information or Correspondence

Inactive (Previous year ISP/ Life Plan, Annual ISP Assessments, Semi-Annual Assessments)

Appendix B

Admissions Checklist

Legal Documents:

- Copy of Birth Certificate
- Copy of Social Security Card
- Court Mittimus (If Individual is in the custody of the State)
- Guardianship Decree
- Court Appointment Letter (for Individuals who have medical Guardian Ad Litem's')
- Conditions of Probation (if applicable)
- Signed Releases of Information completed by the Individual/Legal Guardian
- Signed Acknowledgement of the Human Rights Handbook
- Signed Releases for Transportation/Photographs and related Permission Slips
- Referral/Request Form
- Billing/Services Form/CDAT

Medical/Health Documents:

- Physician's Orders for prescribed medications.
- Health and Immunization Record
- Standing Orders/Protocols from the physician with regard to medical issues (Epilepsy, Allergic Reactions, etc.)
- Copy of Roger's Orders (for Individual's in state custody receiving psychotropic medications)
- Emergency Medical Form
- Copy of Insurance Card
- Copy of most recent Psychiatric, Neuropsychiatric, or other related Evaluations and Assessments.

Vocational Documents:

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

Appendix C

Dress Code

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

3M, MassPack, D'Youville

- Closed toe shoes
- Long pants (no shorts)
- No tank tops

Chelmsford High Kitchen, Sodexo

- *Black closed two shoes*
- *Plain white t-shirt (no graphics)*
- *Black pants*

Billerica Town Hall

- Closed toe shoes
- Long pants preferred
- No tank tops

Billerica Housing Authority (BHA)

- Closed toe shoes
- Long pants preferred
- No tank tops

Bristol Myers Squibb (BMS)

- Closed toe shoes
- Long pants (no shorts)
- Clean and neat T-shirts without large graphics
- No tank tops

Community Catering

- Closed toe shoes
- Plain white t-shirt (no graphics)
- Long pants (no shorts)

Cross Point

- Closed toe shoes
- T-shirts without large graphics
- Khaki material shorts in the summer
- No tank tops or hats

Camp Paul

- Closed toe shoes
- Long pants (no shorts)

Chelmsford High School (CHS), 25 Linnell Circle

- Closed toe shoes
- Long pants preferred
- No tank tops

Meals on Wheels, Food Bank, Strongwater Farm

- Closed toe shoes
- Long pants preferred

Please note that schedules can occasionally fluctuate, so closed toe shoes and pants are suggested on a regular basis. Feel free to reach out with specific questions as seasons change. Thank you!

Appendix D

Health Packet



Dear Parent/Guardian/Caregiver,

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

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

*Seizure Action Plan, signed by physician

*Allergy Action Plan, signed by physician

*Diabetes Action Plan, signed by physician

*Diet Restrictions, signed by physician

If an Individual is prescribed medication to be taken during Program hours or is diagnosed with a medical condition, please contact the Program Nurse at 978-528-7889 or by email at pvong@valleycollaborative.org.
Fax: 978-663-0759

EMERGENCY MEDICAL INFORMATION

Individual's Name: _____ Date of Birth: _____

Address: _____ Telephone#: _____

Contact #1 -Parent/Guardian Name: _____

Address: _____

Email Address: _____

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

☐ Home phone#: _____

☐ Work phone#: _____

☐ Cell phone#: _____

Contact #2 -Parent/Guardian Name: _____

Address: _____

Email Address (optional): _____

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

☐ Home phone#: _____

☐ Work phone#: _____

☐ Cell phone#: _____

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

Telephone#: _____ Relation to Individual: _____

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

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

Allergy	Describe Reaction	Treatment

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

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

Asthma	Describe Reaction	Treatment

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

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

Describe Seizure	Treatment

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Medical/Social/Emotional/Mental Health Diagnoses:

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

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

Insurance Company:_____ Policy#:_____

Policy Holder: _____

Medical Specialists

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

Dentist:_____ Telephone#:_____ Fax#:_____

Other:_____ Telephone#:_____ Fax#:_____

EMERGENCY MEDICAL TREATMENT CONSENT

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

RELEASE OF RECORDS

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

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

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

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

HEALTH CARE DECLINATION

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

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

**Please note: This form will expire one year from date signed. Please inform the Director of DDS Services of any changes.*

PHYSICIANS MEDICATION ORDER FORM

Name of Individual: _____ Date of Birth: _____

Address: _____ Telephone #: _____

Physician/Clinic: _____ Telephone #: _____

Allergies/Adverse medication reactions: _____

MEDICATIONS TO BE GIVEN DURING DAY PROGRAM HOURS

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

I give permission for the Program Nurse or MAP certified personnel to administer scheduled medications while Individual is at the Program: ____YES or NO____

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

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

Does Individual have Physician permission to self-medicate? / Self-Carry ____YES or NO____

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

MEDICATIONS BEING TAKEN BY INDIVIDUAL AT HOME

Medication & Dose	Route & Frequency	Treatment Purpose	Prescribed by

Physicians Signature: _____ Date: _____

Parent/Guardian Signature: _____ Date: _____

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

Individual's Name: _____ Date of Birth: _____

PHYSICIAN PERMISSION FOR STANDING ORDERS

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

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

1. Acetaminophen (Tylenol) every 4 hours for complaint of pain or fever over 100.5 degrees.
Dosage: Over 60lbs give 325- 650mg by mouth. Not to exceed 4g/day
2. Ibuprofen (Motrin/Advil) every 6 hours for complaint of pain or fever over 100.5 degrees.
Dosage: Adult 200-400mg by mouth. Not to exceed 3.2g/day
3. Oral pain reliever for tooth pain or mouth sores as needed.
4. Calcium Carbonate antacid (Tums) for indigestion up to 2 tabs for one dose only.
5. Diphenhydramine (Benadryl) every 4 hours as needed for *allergic reactions: itching, and/or hives*.
Dosage: Weight over 50lbs. give 25mg by mouth
6. Hydrocortisone skin ointment 1% for itch.
7. Cough drops as needed for throat discomfort/cold symptoms.
8. Neosporin to affected areas as needed

Prescription PRN Medications below must be provided by the family:

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

Order: _____

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

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

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

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

Does physician give permission for Individual to self-administer/self-carry above medications? ☐ YES or ☐ NO

Assessment form with MD signature must be completed and attached.

Physician Signature: _____ **Date:** _____

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

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

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

INDIVIDUALIZED SEIZURE PROTOCOL

NAME_____DOB_____

TYPE OF SEIZURE_____DURATION_____

LAST SEIZURE _____

DESCRIPTION _____

CALL EMS (911)

- If seizure last greater than _____minutes (VC policy 5 minutes)
- If the Individual has one seizure after another **yes** **no**
- If there is a CHANGE in a seizure pattern **yes** **no**
- If the Individual has been injured **yes** **no**
- If Individual has a seizure who has an INACTIVE pattern (greater than 1 year) **yes** **no**
- Other instructions or any changes to the above statement: _____

CALL NEUROLOGIST- (*Program Nurse will call*)

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

Additional Information: _____

Physician Name: _____ Tel: _____

Physician Signature: _____ Date: _____

Parent/Guardian Signature _____ Date: _____

Seizure Protocol

PROTOCOL:

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

PROCEDURE:

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

Individuals name: _____ Date of birth: _____

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

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

Physician Use only

____ Please use the above protocol for my patient.

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

Physician's additional instructions: _____

Physician signature: _____ **Date:** _____

ALLERGY ACTION PLAN

Name: _____ Date of birth: _____

ALLERGY TO: _____

Asthmatic: ☐ Yes* ☐ No *Yes= Severe risk for reaction

SIGNS OF AN ALLERGIC REACTION:

Systems:

Symptoms:

MOUTH

Itching & swelling of the lips, tongue, or mouth

THROAT

Itching and/or a sense of tightness in the throat, hoarseness and hacking cough

SKIN

Hives, itchy rash, and/or swelling about the face or extremities

GUT

Nausea, abdominal cramps, vomiting and/or diarrhea

LUNG

Shortness of breath, repetitive coughing, and/or wheezing

HEART

"Thready" pulse, "passing-out"

The severity of symptoms can quickly change.

***All above symptoms can potentially progress to a life-threatening situation.**

1. If ingestion is suspected and/or symptoms are: _____ Give: _____ **IMMEDIATELY!**

2. **Call 911. DO NOT HESITATE TO CALL EMS/ 911 !!!**

3. Notify Parent/Guardian- Name: _____

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

☐ Home phone#: _____

☐ Work phone#: _____

☐ Cell phone#: _____

Emergency Contact (if parent/guardian cannot be reached)

Name: _____

Telephone#: _____ Relation to student: _____

Parent/guardian Signature: _____ Date: _____

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

Individual's Name: _____ Date of birth: _____

For physician use only:

Physician Name _____ Phone#: _____

Physician Signature: _____ Date: _____

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

Diabetic Action Plan

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

Symptoms Individual *may* exhibit:

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

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

Individual's Name: _____ Date of birth: _____

Daily Medications: _____

Physician Name: _____ Phone Number: _____

Physician signature: _____

Notify Parent/Guardian: Name: _____

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

☐ Home phone#: _____

☐ Work phone#: _____

☐ Cell phone#: _____

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

Telephone#: _____ Relation to Individual: _____

Program Nurse Signature: _____ Date: _____

Program Nurse Phone Number: 978-528-7889

Feeding & Diet Sheet

To be completed by Physician

Individual's Name: _____

Date of Birth: _____ Weight: _____ Height: _____

Allergies: _____

Reason for Modified Diet: _____

History of Aspiration?

- ☐ Yes, when: _____
- ☐ No

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

If yes, please attach copies of all reports to this form. Please see attached release of information form.

- ☐ Yes
- ☐ No

Current Diet Recommendations:

Texture:

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

Liquid Consistency:

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

Medications:

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

Physician Signature

Date

Dental Refusal Form

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

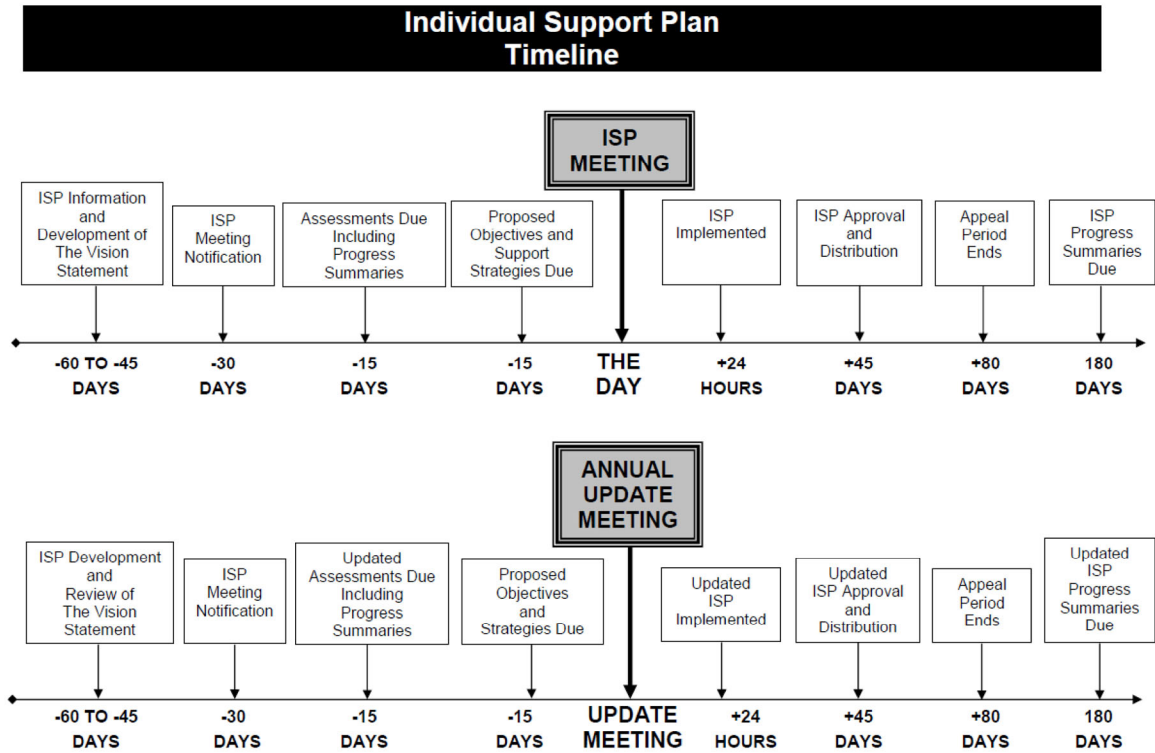
Individual Signature:_____

Guardian Name:_____

Guardian Signature:_____

Date:_____

Individual Support Plan (ISP)



Assessment of Functional Living Skills

Assessment of Functional Living Skills BASIC VOCATIONAL SKILLS Employment Assessment: 3168, 3181, CBDS 3163 SAFETY Assessment: 3168, 3181, CBDS 3163		Site: Date:
Job Coach/Job Developer Name:		
NAME:		
Current or New WORK GOAL (3181 & 3168):		
Current or New CBDS GOAL (3163):		
ISP Process Cycle: (Circle One) Full Semi Year 1 Annual Semi Year 2		
1a	Punctuality:	
	Transitions to work on time consistently	
	Transitions to work on time inconsistently	
1b		
	Transitions from work on time consistently	
	Transitions from work on time inconsistently	
2a	Attendance:	
	Rarely or never misses work	
	Misses work less than twice per month	
	Misses work more than twice per month	
2b		
	Notifies employer when absent or tardy	
	Rarely/Never notifies employer when absent or tardy	
3	Hygiene:	
	Always maintains appropriate hygiene for work	
	Maintains appropriate hygiene at least half of work days	
	Rarely or never arrives to work with appropriate hygiene	
4a	Grooming/ Clothing	
	Always dresses appropriately for work	
	Requires occasional reminders to dress appropriately for work	

	Rarely or never dresses appropriately for work	
4b		
	Always keeps self and clothing clean when performing tasks	
	Requires verbal reminders to keep self and clothing clean when performing tasks	
4c		
	Always adjusts clothing when needed	
	Requires verbal reminders to adjust clothing when needed	
5	Accepting Criticism/ Admitting Mistakes	
	Recognizes and self corrects mistakes when possible and voluntarily notifies supervisor	
	Acknowledges their mistake when asked if they did something incorrect	
	Never accepts mistakes or criticism without negative behavior	
6	Greets Others	
	Initiates and returns greetings	
	Returns greetings	
	Never initiates or returns greetings	
7	Demonstrates Eye Contact when Talking with Others	
	Always maintains eye contact	
	Remains physically orientated to speaker but requires verbal cues to maintain eye contact	
	Never maintains eye contact	
8a	Interacting with Others	
	Always uses friendly and courteous interactions with everyone	
	Only uses friendly and courteous interaction style with people they know	
	Rarely or never uses courteous interaction style	
8b	Respects Personal Space of Others	
	Maintains acceptable space between others	
	Requires occasional reminders to respect others personal space	
	Always requires reminders to respect others personal space	
9a	Remains Calm at Work	
	Consistently reacts appropriately/ calmly to given situations	
	Reacts inappropriately or in a disruptive manner once per week	

	Rarely to never reacts inappropriately or in a disruptive manner	
9b	Demonstrates Non-Disruptive Behavior at Work	
	Never disrupts work environment	
	Requires occasional reminders to correct disruptive behavior while working	
	Frequently requires reminders to correct disruptive behavior while working	
9c	Displays Trustworthiness	
	Is truthful with employers and employees and does not steal	
	Does not steal at work	
	Has not demonstrated trustworthiness	
10a	Follows Simple Verbal Direction	
	Consistently follows 4-step directions	
	Consistently follows 3-step directions	
	Consistently follows 2-step directions	
	Consistently follows 2-step directions with verbal prompts only	
10b	Follows Written Direction	
	Consistently follows 4-step written directions	
	Consistently follows 3-step written directions	
	Consistently follows 2-step written directions	
	Consistently follows 1-step written directions	
11	Confirms Information	
	Asks for clarification when needed	
	Tells instructor when confused	
	Does not confirm information when confused	
12	Maintains Focus	
	Remains focused and attentive to tasks up to 45 mins	
	Remains focused and attentive to tasks up to 30 mins	
	Remains focused and attentive to tasks up to 15 mins	
	Remains focused and attentive to tasks up to 5 mins	
13a	Takes Breaks	
	Takes scheduled breaks and returns on time independently	

	Sometimes requires prompts to take scheduled breaks and return on time	
	Always requires prompts to take scheduled breaks and return on time	
13b	Lunch/Breakroom Etiquette	
	Always appropriate, demonstrates behavior and follows norms and rules when in break room	
	Sometimes appropriate, demonstrates behavior and follows norms and rules when in break room	
14	Learn New Skills	
	Learns most skills after one demonstration	
	Learns skills after five or less demonstrations	
	Requires more than five demonstrations	
15a	Task Performance	
	Always agrees to completes non-preferred tasks	
	Sometimes agrees to completes non-preferred tasks	
	Requires prompts to complete non-preferred tasks	
	Refuses to complete non-preferred tasks	
15b	Performing all Assigned Tasks During Shift	
	Independently and consistently performs all job tasks and expectations throughout entire shift	
	Occasionally requires verbal prompts to ensure all job tasks are completed	
	Always requires prompting to ensure all job tasks are completed	
16	Speed	
	Maintains expected speed on job	
	Occasionally requires reminders to maintain expected pace	
	Always requires reminders to maintain expected pace	
17	Prioritizing	
	Always independently prioritizes tasks correctly	
	Occasionally requires verbal prompts to prioritizes tasks correctly	
	Requires job coach to prioritize tasks correctly	
18	Seeking Additional Work	
	When task is complete, finds additional work on his/her own	
	When task is complete, asks supervisor for additional work	
	When task is complete, will occasionally ask for additional work	

	Does not seek additional work, but will do it when given	
	Refuses to do additional work	
19a	Use/ Care of Equipment	
	Uses and cares for equipment with respect	
	Uses equipment, and returns it the majority of the time	
	Uses equipment appropriately, but may not return it	
	Carelessly uses equipment, but returns it to original place	
	Carelessly uses equipment; does not put it away	
19b	Keeps a Clean and Tidy Work Area	
	Always keeps work area and personal belonging neat and tidy	
	Sometimes keeps work area and personal belongings neat and tidy	
	Rarely keeps work area and personal belonging neat and tidy	
20	Overall Improvement (From day one until the end of the training)	
	Outstanding	
	Very Good	
	Average	
	Minimal	
	None	
21	Safety & Evacuation	Yes / No / NA
	Can Individual evacuate work site safely?	
	Can Individual state/show name, address, phone number?	
	Does Individual carry an ID card?	
	Does Individual carry/wear a medical ID?	
	Can Individual use a cell phone or telephone?	
	Can Individual call 911?	
	Can Individual call (yell to) supervisor for help?	
	Does the Individual stay with the group?	
	Can the Individual navigate crowds and curbs?	
	Can the Individual identify 5 basic community signs (exit, restroom, caution, etc.)?	
	Can the Individual cross the street safely?	

	Can the Individual cross a parking lot safely?	
	Can the Individual fasten his/her seatbelt?	
	Can the Individual identify 2 sources of community help (police, fire, etc.)?	
	Does the Individual cooperate during evacuations?	
	Can the Individual identify alternative exits if main exit is blocked?	
	Does this Individual require assistance to exit in a timely manner? (describe below)	
	Assessor's Signature:	
	Individual's Signature:	

Person Centered Plan

Annual Review

Name: _____

Date: _____

Next Review Date: _____

Case Manager: _____

QUALITY OF LIFE: CBDS

Any changes to Physical Needs:

Any changes to Mental Needs:

Any changes to Spiritual Needs:

Any changes to Social Needs:

ADULT LIVING: CBDS

Any changes in Adaptive Living Skills?

Any changes in Adaptive Living Strengths?

COMMUNITY ENGAGEMENT: CBDS

What does your community mean to you?

What are your interests in the community?

What types of leisure activities do you want to pursue?

EMPLOYMENT

What new Skills do you have?

What new Abilities do you have?

What are your career choices?

Additional Comments:

Case Manager Signature: _____ Date: _____

Individual Signature: _____ Date: _____

Appendix H

DDS Program Worker Trainee Disclosure Form

Valley Collaborative’s Today and Tomorrow Program provides individuals the opportunity to be “Worker Trainees” within the Group Supported Employment model.

By enrolling in Valley Collaborative’s Today and Tomorrow Program, I understand I will have the opportunity to work in a group supported employment setting as a “Worker Trainee” supported by Valley Collaborative staff and to earn a stipend equivalent to the hourly minimum wage in Massachusetts. Also, and as defined by the Massachusetts Department of Unemployment Assistance, individuals may not be eligible for unemployment benefits if the only source of employment is from working as a worker trainee in a program run by a nonprofit or public institution (i.e. Valley Collaborative).

By signing this form, I understand that being enrolled in the Today and Tomorrow Program does not make me an employee of Valley Collaborative, or any other organization where I participate in Group Supported Employment. I have been made aware that I will not receive the employee benefit package offered by Valley Collaborative or the buisnesses where I participate in Group Supported Employment as my worker trainee program does not meet the eligibility requirements of employment. As such, “Worker Trainees” are not eligible for employee benefits such as paid leave, holiday pay, vacation time, workers compensation, unemployment insurance, state pension, etc.

Name: _____ Date: _____

Signature: _____

If applicable, Guardian Signature: _____



Central Administration

11 Executive Park Dr., N. Billerica MA 01862 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 12, 2024
Re: Disabled Persons Protection Commission (DPPC) Abuser Registry Compliance Review & Approval of the Human Resources & Payroll Policies and Procedures Manual

In 2020, Massachusetts enacted “Nicky’s Law” (M.G.L. c. 19C § 15), requiring the Disabled Persons Protection Commission (DPPC) to “establish and maintain a registry of care providers against whom the [DPPC] has made a substantiated finding of registrable abuse.” The DPPC Abuser Registry was effective July 31, 2021, and is intended to protect individuals with intellectual or developmental disabilities (pursuant to a contract or agreement with the Department of Developmental Services (“DDS”)/funding administered by DDS) by barring care providers who have a substantiated finding of registrable abuse from working with other persons with intellectual or developmental disabilities. DDS and agencies defined as Employers (Valley Collaborative) by this law must first check the registry before employing a candidate.

To ensure compliance with Nicky’s Law, the DPPC is authorized to conduct periodic compliance reviews of DDS and agencies defined as Employers (Valley Collaborative). Valley has just completed its first compliance review on September 6, 2024. This review included DDS staff hired after July 1, 2023, along with their signed DPPC Consent Form and Valley’s internal policies and procedures to adhere to M.G.L. c. 19C § 15.

The Board of Directors approves the Human Resources & Payroll Policies and Procedures Manual when updated are made to this ‘working document.’

At this time, we bring forward an updated Human Resources & Payroll Policies and Procedures Manual to formally include the Disabled Persons Protection Commission (DPPC) Abuser Registry Policy and Procedures as well as the DPPC Abuser Registry Consent Form as Appendix Z.

Required Action:

- Vote Human Resources & Payroll Policies and Procedures Manual

Attachments:

- Human Resources & Payroll Policies and Procedures Manual

Valley Collaborative Human Resources & Payroll Policies & Procedures Manual

Table of Contents

Recruitment	5
Identified Hiring Need	5
Onboarding	6
Human Resources Pre-employment	6
Signed Employment Agreement	6
Voluntary EEO Identification Form	6
Meal Break Waiver Form	7
Electronic Consent Form	7
Proof of highest degree held (i.e. diploma, transcripts, etc.)	7
Payroll Pre-Employment	7
Employee Direct Deposit Authorization Agreement & Voided Check	7
Form M-4 - Massachusetts Employee's Withholding Exemption Certificate	8
Form W-4 - Employee's Withholdings Allowance Certificate (Federal Tax Form)	8
Form I-9 - Employment Eligibility Verification, Department of Homeland Security, U.S. Citizenship and Immigration Services	8
Benefits Pre-Employment	9
GIC Enrollment / Change Form (Form-1)	9
GIC Dental / Vision Enrollment / Change Form (Form-IDV)	9
GIC Employment Status Change Form (Form-1A)	9
State Employment Acknowledgement Form for GIC Eligible Employees	9
Short Term Disability Form - The Hartford	10
Employer Waiver / Election Form Compensation Reduction Agreement - Section 125 Cafeteria Plan	10
GIC Overview of Health Insurance Marketplaces & Notice of Healthcare Exchange	10
https://tinyurl.com/GIC-Health-Connector	10
Health Care Spending Accounts and Dependent Care Assistance Program	11
Retirement Pre-Employment	11
MTRS	11
MSRB	12
OBRA-457 Smart Plan	12
OBRA-457 Smart Plan Voluntary	12
Mass Mutual Voluntary	12

<i>AXA Voluntary – 403(b)</i>	13
Fingerprinting.....	13
<i>SAFIS</i>	13
CORI.....	14
<i>iCORI</i>	14
Disabled Persons Protection Commission (DPPC) Abuser Registry	14
DPPC Policy.....	15
DPPC Procedures	17
Motor Vehicle Reports	18
<i>Intellicorp</i>	18
DESE Primary Licenses System Onboarding	19
Mandated Trainings System Onboarding	19
IVEE System Onboarding.....	20
ADP System Onboarding – General.....	21
ADP System Onboarding – New Hire.....	22
ADP System Onboarding –Rehire	31
Company code T4P new hires:	33
Follett Aspen System Onboarding.....	34
eSped System Onboarding	35
Caseload Tracker System Onboarding.....	36
Staff Evaluation Tracker System Onboarding	36
Mentor Program Tracker System Onboarding	37
First Aid/CPR/MAP Certification System Onboarding	37
Restraint Training Tracker System Onboarding.....	37
Medical Waiver Tracker System Onboarding.....	37
Current Staff Changes (change forms & salary action notices)	38
Staff Contact Information Changes.....	40
Staff Contract/Position Changes.....	41
FMLA	43
ADP Biweekly Payroll Procedures	45
Payroll Items	45
Termination Process	51

IVEE termination	52
ADP termination.....	53
GIC termination	53
HCSA/DCAP (FLEX) termination	53
Short Term Disability	53
Terminating Retirement Benefits.....	54
<i>MTRS</i>	54
<i>MSRB</i>	54
<i>OBRA-457 Smart Plan</i>	54
<i>OBRA-457 Smart Plan Voluntary</i>	54
<i>Mass Mutual Voluntary</i>	54
<i>AXA Voluntary</i>	54
ASPEN Termination.....	54
eSped Termination.....	54
DESE Primary Licensure System Termination.....	54
Mandated Trainings System Termination.....	55
Caseload Tracker System Termination	55
Educator Evaluation Tracker System Termination	55
Mentor Program Tracker System Termination.....	55
Employee Training and Clear to Work.....	55
Medical Waiver Tracker System Termination	55
Unemployment Insurance	55
Employment Verifications.....	56
Personnel Records	56
Suitability Determination Procedures.....	57
CORI Procedures	58
Workman's Compensation.....	60
GIC's Annual Benefits Enrollment/Open Enrollment.....	62
Annual Contracting	62
Annual Performance Evaluations: Non-Professional Staff Evaluation & DESE Educator Evaluation.....	62

Recruitment

Identified Hiring Need

1. Supervisor communicates to the Director of Human Resources a need to hire
 - a. the Director of Human Resources checks if there is an available “control code” - if yes proceed to step 2
 - b. If no available “control code” - STOP – Supervisor must seek approval from the Executive Director
2. Hiring Supervisors Post to School Spring
 - a. Use a bank of approved job descriptions
3. Supervisors login to School Spring and review all applications
4. Supervisors schedule interviews
5. At the interview, Supervisors are to ensure:
 - a. the candidate’s School Spring application includes necessary documentation for the role. (i.e. proof of degree, diploma, certifications, etc.)
 - b. Log into ELAR and check the status of any applicable licenses and obtain MEPID if applicable.
6. Supervisors identify a candidate they would like to hire and complete the Google Form [“New Hire Request”](#)
7. HR reviews completed “New Hire Request” form. If all applicable fields are completed an [“Offer Letter”](#) and [“Employee Agreement”](#) can be sent to the candidate.
 - a. New hires can only begin employment on the Monday of a new pay period. [Pay Periods](#) (Appendix A)
 - b. New hires can only begin employment a minimum of 5 days after HR receives an accepted employment agreement
8. Candidate accepts or declines the offer.
 - a. If the candidate accepts the offer, proceed to step 9
 - b. If the candidate declines the offer, return to step 1
9. HR sends out the [“Acceptance & Pre-Employment Meeting”](#) email.
10. Employee attends the Pre-Employment meeting and completes the Pre-Employment Process
11. HR/Payroll personnel must input new hire into all Valley systems before they can begin employment.
12. HR to communicate with all Departments for data entry into all Valley systems

- a. ADP
- b. IV Medical Waiver Tab
- c. ASPEN
- d. Mandated Trainings
- e. Caseload Tracker
- f. Ed. Eval Tracker
- g. Mentor Program Tracker
- h. eSped
- i. Primary Licenses
- j. Employee Training & Clear to Work
- k. Employee Status Changes Google Sheet: Add to New Hire Google Tab
- l. Employee Status Changes Google Sheet: Add to Payroll Tab
- m. Employee Status Changes Google Sheet: Add to Medical Waiver

13. HR must clear all candidates before they may begin employment and will communicate with the hiring supervisors and the candidate via email when they are cleared. The ADP Workforce Now login information will be attached to this communication.

14. HR to communicate with Supervisors/Hiring Managers candidate is cleared to start

Onboarding

Human Resources Pre-employment

Signed Employment Agreement

All Valley Collaborative Employees must have a signed Employment Agreement before they can begin working.

This artifact is stored electronically in the employee's electronic personnel file in ADP under "Employee Documents".

Voluntary EEO Identification Form

<https://tinyurl.com/Voluntary-EEO>

The Equal Employment Opportunity Commission (EEOC) of the United States requires employers to maintain information on applicants pertaining to factors such as race, sex, and type of position for which an individual applies. The information requested on the "Voluntary EEO Identification Form" is for compliance with certain record keeping requirements. Valley Collaborative request all new hire staff to complete this voluntary form. Valley Collaborative believes all persons are entitled to equal employment opportunities and does not discriminate against its employees or applicants for employment because of race, color, sex, religion, national origin, disability, veteran status, age, marital status or any other protected group status.

This form is stored electronically in the employee's electronic personnel file in ADP under "Employee Documents" (Appendix B)

Meal Break Waiver Form

<https://tinyurl.com/Meal-Break-Waiver>

As an employee in Massachusetts, Employees are entitled by law to a 30-minute unpaid meal break for each six hours that they work in a day. All employees who choose to take a meal break for shifts of six or more hours will have contracted hours reduced. However, Employees who would prefer to waive that right and work through this break time, and be paid, instead must complete the "Meal Break Waiver Form".

This form is stored electronically in the employee's electronic personnel file in ADP under "Employee Documents" (Appendix C).

Electronic Consent Form

<https://tinyurl.com/Valley-Electronic-Consent>

All Valley Collaborative electronic communication systems, media, equipment and all communications and information created, stored, saved, viewed, downloaded, uploaded, printed, copied, filed, forwarded or contained in them, are the property of the Collaborative. They are intended for job-related purposes, and all use must be consistent with Collaborative policies, employees shall have no expectation of privacy in connection with any of them. Employees must agree not to use a code, access a file, or retrieve any stored communication unless authorized, and must also agree to abide by Valley Collaborative's Electronic Media policy by signing the "Electronic Consent Form".

This form is stored electronically in the employee's electronic personnel file in ADP under "Employee Documents" (Appendix D).

Proof of highest degree held (i.e. diploma, transcripts, etc.)

Candidates for employment with Valley Collaborative must provide proof of their highest degree held (i.e. diploma, transcripts, etc.).

These artifacts are stored electronically in the employee's electronic personnel file in ADP under "Employee Documents".

Payroll Pre-Employment

Employee Direct Deposit Authorization Agreement & Voided Check

<https://tinyurl.com/Valley-Direct-Deposit>

Valley Collaborative requests all employees to direct deposit their pay. Employees need to complete the "Employee Direct Deposit Authorization Agreement" authorizing Valley Collaborative to deposit any amounts owed to the employee by initiating credit entries to their financial institution indicated on the

“Employee Direct Deposit Authorization Agreement”. This agreement also authorizes the employee’s financial institution to accept and to credit any credit entries indicated by Valley Collaborative to the employee’s financial institution. In the event that Valley Collaborative deposits funds erroneously into the employee’s financial institution, the “Employee Direct Deposit Authorization Agreement” authorizes Valley Collaborative to debit the employee’s financial institution for an amount not to exceed the original amount of the erroneous credit.

This form is used by Valley Collaborative’s human resources/payroll personnel to set up an employee’s direct deposit to their financial institution in ADP. The completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix E).

Form M-4 - Massachusetts Employee’s Withholding Exemption Certificate

<https://tinyurl.com/Valley-M-4>

As an employee in the state of Massachusetts, all Valley Collaborative employee must complete an “M-4 Massachusetts Employee’s Withholding Exemption Certificate”.

This form is used by Valley Collaborative’s human resources/payroll personnel to set up an employee’s state tax withholdings in ADP. The completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix F).

Form W-4 – Employee’s Withholdings Allowance Certificate (Federal Tax Form)

<https://tinyurl.com/Valley-Fed-W4>

As an employee in the United States, all Valley Collaborative employees are to complete Form “W-4 – Employee’s Withholdings Allowance Certificate (Federal Tax Form)” which indicates to your employer the correct federal income tax withholdings from your pay.

This form is used by Valley Collaborative’s human resources/payroll personnel to set up an employee’s federal tax withholdings in ADP. The completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix G).

Form I-9 - Employment Eligibility Verification, Department of Homeland Security, U.S. Citizenship and Immigration Services

<https://tinyurl.com/Valley-Fed-I9>

“Form I-9” is used for verifying the identity and employment authorization of individuals hired for employment in the United States. All U.S. employers must ensure proper completion of “Form I-9” for each individual they hire for employment in the United States. This includes citizens and noncitizens.

The completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents I-9,” with limited access (Appendix H).

Benefits Pre-Employment

GIC Enrollment/Change Form (Form-1)

<https://tinyurl.com/GIC-Form-1>

Valley Collaborative is a member of the Group Insurance Commission in Massachusetts. The Group Insurance Commission (GIC) provides high-quality, affordable health insurance and other benefit options to over 220,000 subscribers and 460,000 members. “GIC Enrollment/Change Form (Form-1)” allows Valley Collaborative employees to enroll in GIC’s Health, Basic Life, Optional Life, and Long Term Disability Insurance.

This form is used by Valley Collaborative’s human resources/payroll personnel to set up an employee’s benefit deductions in ADP. The completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix I).

GIC Dental/Vision Enrollment/Change Form (Form-1DV)

<https://tinyurl.com/GIC-Dental>

Valley Collaborative is a member of the Group Insurance Commission in Massachusetts. The Group Insurance Commission (GIC) provides high-quality, affordable health insurance and other benefit options to over 220,000 subscribers and 460,000 members. “GIC Enrollment/Change Form (Form-1DV)” allows Valley Collaborative employees to enroll in GIC’s Dental Insurance.

This form is used by Valley Collaborative’s human resources/payroll personnel to set up an employee’s benefit deductions in ADP. The completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix J).

GIC Employment Status Change Form (Form-1A)

<https://tinyurl.com/GIC-Form-1A>

Valley Collaborative is a member of the Group Insurance Commission in Massachusetts. The Group Insurance Commission (GIC) provides high-quality, affordable health insurance and other benefit options to over 220,000 subscribers and 460,000 members. The “GIC Employment Status Change Form (Form-1A)” allows prospective Valley Collaborative employees who have worked for a previous employer that was also a GIC member to transfer their current benefits without a loss of coverage.

This form is used by Valley Collaborative’s human resources/payroll personnel to set up an employee’s benefit deductions in ADP. If applicable, the completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix K).

State Employment Acknowledgement Form for GIC Eligible Employees

<https://tinyurl.com/GIC-Acknowledgment-Form>

Valley Collaborative is a member of the Group Insurance Commission in Massachusetts. The Group Insurance Commission (GIC) provides high-quality, affordable health insurance and other benefit options to over 220,000 subscribers and 460,000 members. The “State Employment Acknowledgement Form for GIC Eligible Employees” acknowledges that employees have reviewed the most recent GIC Benefit Decision Guide and understand their benefit options before they make benefit elections.

The completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix L).

Short Term Disability Form - The Hartford

<https://tinyurl.com/Hartford-Short-Term>

Valley Collaborative offers Short Term Disability Insurance through the Hartford Life and Accident Insurance Company. Employees need to complete the “Short Term Disability Form” to enroll in this benefit.

This form is used by Valley Collaborative’s human resources/payroll personnel to set up an employee’s benefit deductions in ADP. If applicable, the completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix M).

Employer Waiver/Election Form Compensation Reduction Agreement – Section 125 Cafeteria Plan

<https://tinyurl.com/Valley-125-Plan>

A Section 125 Cafeteria Plan is an employer-sponsored benefits plan that lets employees pay for certain qualified medical expenses – such as health insurance premiums – on a pre-tax basis. The “Employer Waiver/Election Form Compensation Reduction Agreement” must be completed when an employee elects to either (a) waive all pre-tax benefits or (b) enroll in a pre-tax benefit deducted from their compensation for their medical care coverage premium amount.

This form is used by Valley Collaborative’s human resources/payroll personnel to set up an employee’s benefit deductions either pre-tax or post tax in ADP. This form is also used by Valley Collaborative’s human resources/payroll personnel to identify employees who are eligible to receive a \$1000 taxable stipend in lieu of medical coverage. The completed form is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix N).

GIC Overview of Health Insurance Marketplaces & Notice of Healthcare Exchange

<https://tinyurl.com/GIC-Health-Connector>

Health insurance Marketplaces were set up to make it easier for consumers to compare health insurance plans and enroll in coverage. In Massachusetts, the state Marketplace is known as the Massachusetts Health Connector. Valley Collaborative is required by law (§ 1512 of the ACA, which creates 29 U.S.C. 218b) to provide its employees with the information contained in the “GIC Overview of Health Insurance Marketplaces & Notice of Healthcare Exchange” notice. Valley Collaborative may or may not qualify for subsidized health insurance through the Health Connector. If an employee is offered coverage by their

employer that is considered “affordable” and meets a “minimum value” standard according to federal definitions, they most likely will not qualify for the subsidized coverage offered through the Health Connector described in the notice. However, it may still be helpful for employees to read and understand the information included in the “GIC Overview of Health Insurance Marketplaces & Notice of Healthcare Exchange” notice.

This artifact is stored electronically in the employee’s electronic personnel file in ADP under “Employee Documents” (Appendix O).

Health Care Spending Accounts and Dependent Care Assistance Program

At the pre-employment meeting of prospective Valley Collaborative employees, and if the prospective employee so chooses, the Human Resource Department will facilitate enrollment into Flexible Spending plans, including Health Care Spending Accounts (HCSA) and Dependent Care Assistance Program (DCAP) provided by Benefit Strategies.

If the employee has chosen to enroll in an FSA, Valley Collaborative’s human resources/payroll personnel then sets up the employee’s HCSA and/or DCAP deductions as payroll deductions in ADP.

Retirement Pre-Employment

MTRS

All new hire Teachers, Speech Language Pathologists, Guidance Counselors, and Social Workers must contribute to the Massachusetts Teachers’ Retirement System (MTRS). As an eligible MTRS member, an employee will make contributions to the MTRS annuity savings fund and, eventually, receive those contributions in the form of a retirement allowance, refund or, in the event of his/her death, a survivor benefit.

Registering a new hire Teacher, Speech Language Pathologist, Guidance Counselor, and Social Worker into MyTRS is a two step process:

HR logs into [MyTRS](#) and selects ‘register employee.’

Step 1: HR enters data fields to register new hire based on contract terms and receives a confirmation email of this registration.

Step 2: HR emails confirmation email and steps for employee to complete the registration process within 5 days of receipt of email correspondence

Valley Collaborative’s human resources/payroll personnel sets up the employee’s MTRS deductions as a payroll deduction in ADP.

MSRB

<https://tinyurl.com/MSRB-Form>

New hire employees who do not work in a Department of Elementary and Secondary Education program at Valley Collaborative, and/or who are not employed in positions that require a DESE certification must enroll Massachusetts State Retirement Board (MSRB).

The MSRB administers the Massachusetts State Employees' Retirement System (MSERS) for state employees and certain other employees of public entities. The MSERS is a contributory defined benefit system governed by Massachusetts General Law Chapter 32. The system provides retirement, disability, survivor, and death benefits to its members and their beneficiaries.

Once a new hire completes the form, the form is then mailed to the MSRB. Valley Collaborative's human resources/payroll personnel sets up the employee's MSRB deductions as a payroll deduction in ADP (Appendix P).

OBRA-457 Smart Plan

<https://tinyurl.com/Smart-Plan-Mandatory>

All part-time, seasonal or temporary employees of the Commonwealth of Massachusetts or a Massachusetts local government employer, are required to participate in the SMART Plan. The SMART Plan is an alternative to Social Security as permitted by the federal Omnibus Budget Reconciliation Act of 1990 (OBRA). OBRA, passed by the U.S. Congress, requires that beginning July 1, 1991, employees not eligible to participate in their employer's retirement program be placed in Social Security or another program meeting federal requirements. The SMART Plan meets those federal requirements.

All Valley Collaborative substitutes or employees who work a .5 FTE or less, must complete the Massachusetts Deferred Compensation SMART Plan - Mandatory OBRA form. Valley Collaborative's human resources/payroll personnel then scans the form to Valley Collaborative's OBRA representative. Valley Collaborative's human resources/payroll personnel sets up the employee's MSRB deductions as a payroll deduction in ADP. If applicable, the completed form is stored electronically in the employee's electronic personnel file in ADP under "Employee Documents" (Appendix Q).

OBRA-457 Smart Plan Voluntary

As of March 2020, this plan has not yet been offered to Valley Collaborative employees.

Mass Mutual Voluntary

Valley Collaborative has previously offered its employees the option to directly contribute to a MASS Mutual Individual Retirement Account. We no longer offer this benefit upon hire. However, we do have several staff who are grandfathered in and therefore an automatic payroll deduction is set up in ADP.

AXA Voluntary – 403(b)

Section 403(b) of the Internal Revenue Code provides a way for any district employee to defer a portion of their salary into a retirement account on a pre-tax basis. Employees interested in learning more and/or setting up a 403(b) plan should contact Valley Collaborative's AXA advisor:

Patrick Belniak
774-276-0320
Patrick.Belniak@AXA-Advisors.com
www.PatrickBelniak.com

Once a plan is set up with AXA, Valley Collaborative's AXA representative emails Valley Collaborative the employee's "403(b) Tax Sheltered Salary Reduction Agreement" form. Valley Collaborative's human resources/payroll personnel sets up the employee's 403(b) deduction as a payroll deduction in ADP and stores the form electronically in the employee's personnel file in ADP under "Employee Documents"

Fingerprinting

SAFIS

<https://tinyurl.com/Valley-SAFIS>

Massachusetts law now authorizes fingerprint-based criminal history record checks for all public and private school employees and transportation providers, and for designated volunteers and employees of school vendors. The Massachusetts Department of Elementary and Secondary Education (ESE) and the Department of Early Education and Care (EEC), the Executive Office of Public Safety and Security (EOPSS) have partnered with MorphoTrust USA to implement the Statewide Applicant Fingerprint Identification Services (SAFIS) Program. This program provides convenient applicant fingerprinting enrollment centers throughout the Commonwealth of Massachusetts.

Prospective employees should review two important documents posted in the forms section of the MorphoTrust USA IndentoGo registration website: the [SAFIS Registration Guide for PreK-12th Grade Education \(DESE\)](#), and [SAFIS Form 004: How to Change, Correct, or Update Your National Criminal History Record Response](#). (Appendix R).

Valley Collaborative HR staff should:

1. Direct new hire to Valley Collaborative website to find required SAFIS fingerprinting information.
2. HR Valley Collaborative staff receive SAFIS results via email
3. HR Valley Collaborative staff are to record SAFIS results on the "Employee Training and Clear to Work" spreadsheet columns

If a new hire has worked for a public school and has completed this fingerprinting requirement, the perspective employee can request a suitability determination letter from the receiver of the original SAFIS record. The DESE has not established regulations regarding the frequency of checks, but the regulations do permit schools to rely on “suitability determinations” made by other Massachusetts schools if: (a) fingerprints were checked during the prior seven years, (b) the individual has not resided outside of Massachusetts for longer than three years since suitability for employment was determined (i.e. successful completion of a fingerprint-based check), and (c) the individual has been continuously employed by a Massachusetts school or does not have gaps in employment totaling more than two years. 603 CMR 51.06(3); M.G.L. c. 71, § 38R.

CORI

iCORI

<https://tinyurl.com/Valley-CORI>

The term “CORI” is an abbreviation for Criminal Offender Record Information. CORI is defined broadly in Massachusetts General Law c. 6, § 167 to include the information described in this section as well as other types of data that identify an individual with a Massachusetts criminal offense, such as a police report or mug shot (Appendix S).

Valley Collaborative Human Resources is to:

1. Direct all new hires to complete, sign and date the Criminal Offender Record Information (CORI) Acknowledgment Form.
2. Using the [iCORI](#) web portal, HR representatives/users will submit a request for an individual’s CORI
3. HR representative will record results on the “Employee Training and Clear to Work” spreadsheet columns
4. HR representative will upload the CORI Acknowledgement Form to each employees personnel file in ADP via the employee documents

Disabled Persons Protection Commission (DPPC) Abuser Registry

In 2020, Massachusetts enacted a law requiring the Disabled Persons Protection Commission (DPPC) to “establish and maintain a registry of care providers against whom the [DPPC] has made a substantiated finding of registrable abuse.” The DPPC Abuser Registry was effective July 31, 2021, and is intended to protect individuals with intellectual or developmental disabilities (“I/DD”) by barring care providers who have a substantiated finding of registrable abuse from working with other persons with intellectual or developmental disabilities. A care provider is a person who is employed by, or contracts with, the Department of Developmental Services (“DDS”) or an Employer who provides services or treatment to persons with I/DD. Care providers include all current and prospective caretakers in any program licensed, contracted, or funded by DDS to provide services and support to persons with intellectual or developmental disabilities. Care providers can include volunteers, interns, work-study participants, or any other similar unpaid positions.

DDS and agencies defined as Employers (Valley Collaborative) by the law must check the registry. For purposes of the DPPC Abuser Registry, Employer means any agency that provides services or treatment to people with I/DD pursuant to:

- A contract or agreement with DDS;
- Funding administered by DDS; or
- A license issued by DDS.

The DPPC Abuser Registry is not a public registry. This information is not considered a “public record” for purposes of M.G.L. c. 66 and all information regarding care providers listed on the DPPC Abuser Registry is confidential. By law, the DPPC Abuser Registry can only be accessed by DDS or Employers who are funded by, contract with, or are licensed by DDS. Employers are required to create verified accounts to check whether employees or prospective employees are on the DPPC Abuser Registry.

DPPC Policy

Scope and Purpose

118 CMR 15.00 governs the operations of the registry of care providers against whom the Commission has made a substantiated finding of registrable abuse as prescribed by M.G.L. c. 19C, § 15. 118 CMR 15.00 is applicable to all current and prospective care providers in any program licensed, contracted, or funded by the department; and any individual who provides services on behalf of any program licensed or funded by, or contracting with the department.

Policy

In order to ensure that care providers in any facility or program licensed or funded by the department or contracting with the department are appropriate for serving in their respective capacities, employers (Valley Collaborative) and the department must meet all requirements of 118 CMR 15.02 in performing inquiries to the abuser registry.

Responsibilities of the Department or the Employer

- (1) The department or the employer (Valley Collaborative) shall ensure that all requirements of 118 CMR 15.00 have been met, as applicable.
- (2) In accordance with M.G.L. c. 19C, § 15, prior to employing, contracting with, or utilizing the services of a care provider, the department or the employer shall perform a search of the registry for the care provider's identity. The department or the employer (Valley Collaborative) shall require as a condition of employment the satisfactory completion of a registry search. The department or the employer (Valley Collaborative) shall offer employment, contract with, or agree to utilize services only after the results of a registry search have found the prospective care provider absent from the abuser registry.
- (3) The department or the employer (Valley Collaborative) shall ensure each prospective care provider signs a written consent to a search of the registry prior to performing the search. The department or the employer (Valley Collaborative) shall inform the prospective care provider that his or her personal information will be used to make a registry search. Documentation of such consent and notification shall

be included in the employer's (Valley Collaborative's) or the department's employment application materials.

(4) A search of the registry shall be conducted on care providers who have had a break in employment of one year or more from the department or employer (Valley Collaborative) prior to recommencing employment in same manner as a prospective care provider pursuant to 118 CMR 15.03(2) and (3).

(5) If the care provider's identifying information appears on the registry, or if the care provider declines to consent to a registry search, the department or the employer (Valley Collaborative) shall not employ, contract with, or utilize the services of the care provider.

(6) If the department or the employer (Valley Collaborative) receives notification pursuant to 118 CMR 14.05: Notification Regarding Registrable Abuse Cases and Proceedings that it is currently employing, contracting with, or utilizing the services of a care provider listed on the registry, the department or employer (Valley Collaborative) shall immediately terminate the employment, contract, or utilization of services of said care provider. 7/23/21 118 CMR - 5915.03:

(7) Upon any failure to hire or termination effective pursuant to 118 CMR 15.03, the department or employer shall provide the care provider with the contact information for the Commission.

Recurrent Registry Screening

(1) The department or employer (Valley Collaborative) may, at its own discretion, perform a registry search for any current care provider who the department or employer employs, contracts with, or utilizes the services of.

(2) The department or the employer (Valley Collaborative) shall ensure each care provider signs a written consent to a search of the abuser registry prior to performing the search. The department or the employer (Valley Collaborative) shall inform the care provider that his or her personal information will be used to make a registry search. Documentation of such consent and notification shall be included in the care provider's personnel file.

(3) If the care provider's identity appears on the registry, or if the care provider declines to consent to a registry search, the department or the employer (Valley Collaborative) shall immediately terminate the employment, contract, or utilization of services of the care provider.

(4) Upon any termination effective pursuant to 118 CMR 15.04, the department or employer (Valley Collaborative) shall provide the care provider with the contact information for the Commission.

Disputes regarding the Identity of a Care Provider

(1) The Commission will make every reasonable effort to confirm identity of a care provider whose personal information appears on the registry by including name, date of birth, and any other unique characteristics such as maiden names, aliases, or last four digits of Social Security number. The Commission shall maintain procedures to resolve any disputes regarding the identity of a care provider when contested by the care provider, department, or employer (Valley Collaborative).

(2) The department or employer (Valley Collaborative) shall provide to the Commission any information requested by the Commission that will confirm the identity of the care provider.

DPPC Procedures

<https://tinyurl.com/DPPCForm>

I. CONDUCTING DPPC REGISTRY SEARCH

DPPC checks will only be conducted as authorized by the Disabled Persons Protection Commission (DPPC) and M.G.L. c. 19C, § 15, and only after a DPPC Consent Form has been completed.

A DPPC Consent Form shall be recompleted every two years for checks on current employees in Valley Collaborative's Adult Services program. Please note, the DPPC Consent Form adopted by Valley Collaborative must be signed before each time the employee is searched in the Registry.

For prospective employees, Valley Collaborative Human Resources is to:

5. Direct all new hires for the DDS program(s) to complete, sign and date the Disabled Persons Protection Commission (DPPC) Consent Form via DocuSign.
 1. If the candidate refuses to sign the Consent Form, Valley Collaborative will rescind the offer of employment.
6. During the pre-employment process and using the DPPC Registry web portal, Valley Collaborative HR Registry Authorized Users will search the registry for the candidate using the DPPC Consent Form.
 1. If "Match" is found during search, HR Registry Authorized User will contact the DPPC and report the candidate. Valley Collaborative will not hire or retain anyone whose name appears on the Registry.
 2. If "No Match" is found during search, HR Registry Authorized User will move forward with pre-employment process.
 3. If "Upload Additional Documents" is found during search, Valley Collaborative will upload prospective care provider's identifying documentation (i.e. driver's license, passport) when requested from DPPC.
7. HR representative will record results on the "Employee Training and Clear to Work" spreadsheet columns
8. HR representative will upload the Disabled Persons Protection Commission (DPPC) Consent Form to each employee's personnel file in ADP via the employee documents

II. ACCESS TO DPPC

Valley's DPPC Authorized Users have received training and therefore have an understanding that all DPPC results obtained are confidential, and access to the information will be limited to Authorized Users who "need to know". Valley Collaborative must maintain and keep a current list of each authorized DPPC User who has access to, or is qualified to view, DPPC results. This list must be updated every six (6) months and is subject to inspection upon request at any time.

Authorized DPPC Registry Users

<u>Name</u>	<u>Role</u>
Kari Morrin	Authorized User

Kathleen Diaz

Authorized User

Matthew Gentile

Authorized Access Administrator

NEED TO KNOW

Chris A. Scott, Executive Director

Joia Mercurio, Deputy Director

Matthew Gentile, Director of DDS Services

III. DPPC TRAINING

An informed review of Valley Collaborative's DPPC policy and procedures is required for DPPC Authorized Users.

Motor Vehicle Reports

Intellicorp

<https://tinyurl.com/MVR-Background-Check>

<https://tinyurl.com/Valley-Disclosure-Form>

All Valley Collaborative employees whose position requires them to drive Valley Collaborative vehicles, are required to complete "Acknowledgement and Authorization for Background Check (MVR)" and "Disclosure Regarding Background Check (MVR)" forms. These forms allow Valley Collaborative to check a person's driving record and compare it against a Matrix of driver acceptability (Appendix T & U).

1. New hire should complete, sign and date the "Acknowledgement and Authorization for Background Check (MVR)" and "Disclosure Regarding Background Check (MVR)" forms. Verify information using identification.
2. Valley Collaborative's human resources/payroll personnel then uploads information into Intellicorp web portal.
3. Valley Collaborative's human resources/payroll personnel records the results on the "Employee Training and Clear to Work" spreadsheet columns
4. All DDS & MRC staff are also checked

DESE Primary Licenses System Onboarding

If the new hire is a licensed educator and/or in a DESE licensed role, Valley Collaborative's human resources/payroll personnel must enter them into "DESE Primary Licenses" Google sheet located in the Human Resources Google Drive.

To gather employee license information, Valley Collaborative's human resources/payroll personnel logs onto the [DESE Security Portal](#) and navigates to ELAR Welcome Page and then Administrative Inquiry. Here the Valley Collaborative's human resources/payroll personnel enters in either the employee's Social Security Number, Massachusetts License Number, or their Massachusetts Education Personnel ID (MEPID). If the employee is a licensed educator, their licensing information will be listed here.

Mandated Trainings System Onboarding

According to the [Massachusetts Department of Elementary and Secondary Education's approval criteria and for Massachusetts public day special education school programs](#), new staff may not be assigned direct care duties with students until they have participated in all mandated trainings listed under criterion 12.2 a-e through their orientation program. Valley Collaborative human resources/payroll personnel tracks the completion of these mandated trainings in a Mandated Training Tracker Google sheet by following the steps below:

1. HR enters a new hire's first name, last name, and supervisor into the Mandated Training Tracker in Google in order to populate trainings for the employee
2. During pre-employment meetings, HR provides employees with his/her Valley Google credentials
3. New hire employees are directed to the Mandated Trainings via the Valley Collaborative website at: <https://www.valleycollaborative.org/domain/53> .
 - a) Anti-bullying
 - b) Behavior Management
 - c) Bloodborne Pathogens
 - d) Collaborative Safety and Runaway Students
 - e) Conflict of Interest
 - f) Driver Training
 - g) EpiPen
 - h) IDEA/504
 - i) Reporting Child Abuse and Neglect
 - j) Student Discipline
 - k) Student Rights Confidentiality
 - l) Acknowledgement of Orientation Day Training 2019-2020
4. New Hires are required to complete all 12 of the above listed mandatory training modules before they can begin employment, by clicking on each training, reviewing the materials, uploading a certificate of completion if the training requires it, and then completing the google form.
5. New hires alert HR to confirm they have completed all mandatory trainings and uploaded appropriate documentation.

IVEE System Onboarding

Valley Collaborative uses Infinite Visions as it's financial software and as such all new hires must be entered into the Infinite Visions Enterprise Edition (IVEE) system before they can begin employment by following the below steps:

- Login to IVEE
- Navigate to "Employee Maintenance"
 - Click Add
 - General Information Tab
 - First Name
 - Middle Initial
 - Last Name
 - SS#
 - Mailing Address
 - Status - dropdown - Active
 - Employee Category - dropdown - Active
 - Substitutes - check box
 - Gender
 - Marital Status
 - Primary Job Title - dropdown
 - Primary Worksite - dropdown
 - Check Location - dropdown
 - Template - dropdown
 - Dates/Demographics Tab
 - Birth Date
 - Hire Date
- Check the "Process employee setup wizard" box before clicking OK
- Edit Employee Positions window - Actions - Assign Position
 - Select control code that has been assigned to employee on new hire intake paperwork
 - Once position assigned, confirm the following
 - Pay tab -
 - Salary - Actions - Set Salary Schedule
 - Hours Per Day
 - FTE
 - Position Dates
 - Periods
 - Skittle - confirm salary - OK
 - Edit Employee Positions & Pay - YES - OK - OK
 - Edit Employee Deductions – CANCEL
- Supplemental Pays
 - Medical Waiver
 - Stipends

ADP System Onboarding – General

Valley Collaborative uses Automatic Data Processing (ADP) as its comprehensive payroll and HR system and as such all new hires must be entered into ADP.

When entering employees into the ADP system, **although there are exceptions**, generally speaking, certain categories of employees will default to certain settings. Please see below.

Teachers/Therapist - School Programs
Pay Type: Salaried do not use time & attendance or schedules
Pay Rates: Need pay breakout/professional salary calculator
Work Calendar: Salary 212/182
Retirement: MTRS (aka teachers)
Check Controls: Pay Group 2
Time Off Policies: Bereavement, Jury Duty, Sick & Personal
Hours Per Day: 7.5

Substitute - School Programs
Pay Type – Hourly - does not use time & attendance & schedules
Pay Rates – hourly rate only
Work Calendar – Substitute
Retirement: OBRA
Check Controls: Pay Group 1
Time Off Policies: None
Hours Per Day: Not Specified

Direct Support Professional - Adult Programs
Pay Type – Hourly - uses time & attendance & schedules
Pay Rates – can be calculated using hourly rate and work calendar
Work Calendar – Hourly 260
Retirement: MSRB (aka MARIS, state)
Check Controls: Pay Group 1
Time Off Policies: Bereavement, Jury Duty, Sick, Personal & Vacation
Hours Per Day: 8

Aide - School Programs
Pay Type: Hourly - uses time & attendance & schedules
Pay Rates: can be calculated using hourly rate and work calendar
Work Calendar: Hourly 207
Retirement: MSRB (aka MARIS, state)
Check Controls: Pay Group 1
Time Off Policies: Bereavement, Jury Duty, Sick & Personal
Hours Per Day: 6.5

SEAs – School Programs
Pay Type: Salaried Non Exempt
Pay Rates: Need pay breakout/professional salary calculator
Work Calendar: Salary 212 or Salary 182
Retirement: MSRB (aka MARIS, state)
Check Controls: Pay Group 2
Time Off Policies: Bereavement, Jury Duty, Sick & Personal
Hours Per Day: 7

Other Adult Program Staff
Pay Type – Hourly or Salary dependent on job description
Pay Rates – can be calculated using hourly rate
Work Calendar – 260 (Hourly or Salary)
Retirement: MSRB (aka MARIS, state)
Check Controls: Pay Group 1
Time Off Policies: Bereavement, Jury Duty, Sick, Personal & Vacation
Hours Per Day: 8

Please navigate to “New Hire” or “Rehire” (depending on the candidate) below for step by step instructions on entering new hires into the ADP online system.

ADP System Onboarding – New Hire

Valley Collaborative uses Automatic Data Processing (ADP) as its comprehensive payroll and HR system and as such all new hires must be entered into ADP by following the below steps:

- Log into [ADP's Workforce Now Administrator web portal](#)
- Navigate to "Process", "HR", "Hire/Rehire", choose either "Hire" and then choose "Payroll HR & Time"
- Complete all sections starting with:

Personal

- Name
- Tax ID Type - Select United States SSN
- Tax ID - enter employee's SS#
- Re-enter Tax ID
- Hire Date
- Reason for Hire
- Company Code
- Gender
- Birth Date

Address

- Country
- Address Line 1
- Address Line 2 & 3 if needed
- City
- State/Territory
- Postal Code
- When entering address, make a note of the county, you will need this information in the Employment portion

Contact Information

- Home Phone
- Cell Phone
- Home e-mail (do not check "use for notification")

Demographic

- More Fields (on right) Ethnicity/Race ID Method - Self ID (Voluntary EEO Identification Form)
Visual ID (Employee's license/passport picture)
- More Fields (on right) Ethnicity Dropdown
- More Fields (on right) Race Dropdown

Employment

- File # & Position ID will be automatically generated by the system
- Job Title - select from dropdown - Required field for MTRS reporting. Consistently populating this information will also help ensure you can leverage the "Analytics" reporting as well as the Performance management functionality for reviews. **If any new values added, please notify ADP so this can be included in the MTRS report mapping.
- Worker Category: Specify if the employee is FT, PT, Temporary, Retired, Substitute
- Reports To – Chose Supervisor the individual will report to

- Time & Attendance Supervisor: This indicates the employee's manager who is responsible for approving their timecard in Time & Attendance. This automatically populates once the "Reports To" manager is chosen but can be changed if needed. For Valley, this is typically the same as the "Reports to" manager but must be separately maintained. This is a required field although it doesn't have a red asterisk.
- Business Unit: Required field in Workforce Now with a single default value for Valley that must be selected.
- Location - enter employee's county
- Home Department - Specify the department for the employee for information-tracking purposes
- Benefits Eligibility Class - Specifies whether an employee is eligible for benefits – DO NOT CHOOSE "GF-Hired After July 1, 2003"
- ACA Benefit Status: If the employee is Full Time, select "Designate Full Time", If the employee is Part Time, select "Calculate Using Measurement Periods".
- NAICS Worker's Comp - select which applies - Workers Compensation code designation:
 - 7382 - Drivers - employees hired as DRIVERS only
 - 8868 – Professionals - teachers, therapies, office workers, TA, subs our major class
 - 9101 – All Other - all employees description "vocational" coach woodshop Etc. adult and students, custodians, food service, "at risk" type employees
- More Fields (on right)
 - FLSA - Non-Exempt or Exempt
 - Home Cost # - This is the "account number" that needs to be assigned to the employee to determine how their PR amounts should be recorded for the General Ledger. See list.

Payroll

- Pay Frequency - already populated and defaulted to bi-weekly
- Regular Pay Rate – Specify if the employee is Hourly or Salary. Refrain from using the "Daily" option. Populate the corresponding Hourly or per pay period biweekly salary amount for the respective pay rate type. Box to the right of the Regular Pay Rate - enter hourly rate for Non-Exempt and Bi-weekly amount for Salary – a pay- breakout/calculation is needed for salary 212 or 182 employees. If pay breakout is needed, save pay breakout in shared drive > 40 Linnell > HR_LINN > PAYROLL > then choose the corresponding fiscal year- and the pay breakouts folder
- Rate 2 Amount: For Salary employees, put in their hourly rate equivalent. This field is unnecessary for Hourly employees.
- Standard hours: Do not populate a value for hourly employees. For Salary employees, populate the expected amount of hours worked for a bi weekly pay period so this can be reported on PR reports and the pay statements.
- Pay group: Defaults to Use Period End Date 1 on checks. 182 & 212 exempt staff are Pay Group 2
- Clock: Identifies the FTE % and contract term for employees for the MTRS report. **This field can be maintained on the "Pay Profile" screen and under the "clock & Data control" area.
 - 1st three numbers: Indicates the FTE % (i.e. 100 = FTE 1 or 100%, 060 = FTE 0.6 or 60%, etc)
 - Last 2 numbers: value of 10 or 12 to indicate whether the employee is contracted for 10 months or 12 months.

EXAMPLE: FTE=1.0 & WORK CALENDAR = 212 > CLOCK CODE=10012

EXAMPLE: FTE=0.6 & WORK CALENDAR = 182 > CLOCK CODE=06010

For months worked, all contracts are 12 months except 180/182 which are 10 months

- Data Control: Identifies whether the employee is enrolled in MARIS or MTRS Retirement plans. This information is used to qualify whether an employee should be included on MARIS or MTRS files. **This field can be maintained on the “Pay Profile” screen and under the “clock & Data control” area.
- Custom Area 1: Identifies whether an employee is contributing 8% or 9% to MARIS retirement to ensure the appropriate code appears on the MARIS files. **This field can be maintained on the “Pay Profile” screen and under the “custom area” section.
Input the value “RSB004” if the employee is contributing 8% toward MARIS
Input the value “RSB005” if the employee is contributing 9% toward MARIS

The screenshot shows the '3 Payroll' form with the following fields and values:

- Pay Frequency**: Biweekly
- Regular Pay Rate**: [Empty] USD
- Data Control**: MARI
- Clock**: [Empty]
- Rate Multiplier**: 1.5 * 1.0
- Standard Hours**: [Empty]
- Pay Group**: Use Period End Date 1 on
- Custom Area 1**: RSB005
- Rate 2 Amount**: [Empty] USD
- Rate 6 Amount**: [Empty]
- Rate 7 Amount**: [Empty]

Red arrows point to the **Data Control** field (set to MARI) and the **Custom Area 1** field (set to RSB005).

More Fields *

- Rate 5 Amount – Daily rate
- Rate 6 Amount: Scheduled *Weekly* hours which can be up to 2 decimal points out. This information is used on the MARIS reporting, but should be populated for all employees for consistency. (i.e. FTE 1 employee who works 8 hrs/day would have a value of “40”). This will also populate as a memo WH amount on the PR register.
- Rate 7 Amount: FTE 1.0 + Annual Salary as of July 1 - Calculated annual pay for employees since the system generated annual pay is not accurate for many of your employees because they don’t receive pay for all 26 pay periods in a year.
- Rate 8 Amount: Actual FTE & Annual Salary as of July 1
- *If pay breakout needed to calculate pay, and pay breakout resulted in a balance of salary owed in August, ensure the employee is entered into payroll items for the corresponding August payroll date

Tax

- Federal Filing Status
- Worked in State - Indicate Massachusetts
- State Marital Status - Indicate the marital status the employee would like to claim for state income taxes

- SUI/SDI Tax Code – Choose MA -02Massachusetts from drop down list
- State Exemptions - Indicate the marital status the employee would like to claim for state allowances/exemptions
- SUI/SDI Tax code: Indicate Massachusetts
- Federal Exemptions: NEW W4! * More Fields (to right) if employee is withholding extra for state or federal.
- Worked in Locality – Leave blank for Valley
- Local Exemptions – Leave blank for Valley

Direct Deposit

- Deduction Code: Select either the CK1 or SV1 deduction code depending on whether it is a checking or savings account. **click “ADD AN ACCOUNT” in upper right hand corner once all steps completed if there is an additional bank account to add.
- Amount to Deposit:
 - Full Net: Full net pay to be deposited to that account. Can also mean *remaining net pay* is deposited into this account if the employee has multiple direct deposit accounts. (i.e. \$100 going into a savings account then selecting “full net” for their checking account to having the remaining net after the \$100 is deposited to go into this checking account.)
 - Partial Net: Dollar amount to be deposited into the bank account indicated. **If another account with “full net” is not set up, the employee will receive their remaining net pay as a physical check.
 - Percent Net: Percentage of net pay to be deposited into the bank account indicated. **If another account with remaining percentage to total to 100% is not setup, then the employee will receive their remaining net pay as a physical check.
 - For Bonus Pay Only: Select box if this bank account is reserved to be used only when bonus payments are made. Click the question mark icon for further details on how the system identifies a bonus pay.
 - Priority #: If there are multiple partial net direct deposits, this will prioritize which accounts receive the partial net direct deposit first in case the total net is not enough to cover all partial net direct deposits.
 - Verify the account – This is toggled to “yes” as a default for Valley. The process is to verify the account by using the prenotification method described below. In rare circumstances, this could be toggled off to allow the very first check of the new hire to be direct deposit instead of following the prenotification method.
 - Transit ABA Number: Routing number that identifies the employees’ bank.
 - Bank deposit Account Number: Bank account number
 - Prenotification Method: Prenotification submission to send a \$0 direct deposit for the first processing (employee will get a physical check).

- Company Default Date: USE THIS FOR VALLEY Direct deposit account is not active for direct deposits to post for 10 business days to ensure enough time for the employees' bank to confirm direct deposit information is accurate.
- Bank Deposit Prenote Date: Alternative date for when the prenotification hold should be lifted to make the direct deposit account active. Leave this blank for Valley.

Time & Attendance

- Pay Class:
 - Hourly FT—Hourly employees who have hours worked and time off tracked in their timecards
 - Hourly FT 260—Hourly employees who have hours worked and time off tracked in their timecards, and also receive Holiday hours
 - Salary
 - Substitute—Substitute teachers only
 - Hourly PT
- Include in Time Summary/Payroll: Should default as being selected. This should always be selected in ensure the employee's hours are sent to PR to be paid out
- Badge Number: Skip this field
- Time Clocks:
 - Time clocks assigned – leave blank
 - Timeclock Groups Assigned - leave blank
 - Timeclock Registration Group - leave blank
- Labor Charge Fields:
 - Department – Choose from drop down
 - Time Zone: Populate the time zone.
- Schedule Template:
 - Choose schedule template from drop down
 - Start Week – defaults to 1
 - Start Date – defaults to start date
 - End date – leave blank

Emergency Contacts

- Populate emergency contact information using New Hire Emergency Contact Form.
- Click the “ADD ADDITIONAL CONTACT” option in the upper right-hand corner if more than one contact available.
- Doctors Information – leave blank

Custom Fields

- Workflow Event – leave blank
- Hours per day – populate the hours per day
- Work Calendar– populate work calendar from drop down list
- MEPID – enter MEPID #

Time Off

- Blackout Calendar, Default Hours, Default Start Time and Accrual Date – Leave blank for Valley
- Click assign time off policies.
- Time-Off Policies: Expand the “assign time-off Policies” icon then move policies over from the left to right to indicate which policies the employees should be assigned.
 - Add Bereavement & Jury Duty
 - Personal day policy - Choose policy based on hours per day. 2 days (converted to hours) for new hires hired before December 31st; 1 day for new hires from January 1st – May 31st, and 0 days for individuals hired in June.
 - Sick Time: Choose policy based on hours calendar year and hours per day. Sick Time upfront is prorated based on DOH and added later in the process (see page...).
 - For months worked, all contracts are 12 months except 180/182 which are 10 months.
- Start date: Put in the effective date (DOH) for when the employee should begin accruing. The monthly accruals are awarded precisely on the 15th of each month so the effective date should coincide on or after this day for any given month to ensure the employee receives their first accrual in the intended month.
- End date: Leave blank

Review all the sections of the new hire record you populated then click “SUBMIT” in the upper right-hand corner.

You will receive a confirmation message that the new hire has been added and the “Hire History” will be available on the Process>HR>Hire/Rehire screen.

There is the option to save & exit at any time to return back to the “In-Progress Hires” tab to resume where you left off with adding a new hire.

Click Done.

NEXT STEPS

CRITICAL Additional Steps: Once the new hire has been added using the template, navigate to the PAY>Pay Profile screen:

Deductions:

If employee elects BL, STD, LTD, or OPL, calculate correct amounts for employee using formulas for each benefit. Once the calculation is done, set up in employee’s pay profile. **STD is effective as of hire date. BL, LTD & OPL use GIC matrix – ensure deduction begin 1 month prior to effective date.**

NEW HIRES

Start Date	Deductions Begin - 1st pay in	Coverage Begins
January 2- February 1	March	April 1
February 2 - March 2	April	May 1
March 3 - April 2	May	June 1
April 3 - May 2	June	July 1
May 3 - June 2	July	August 1
June 3 - July 3	August	September 1
July 4 - August 2	September	October 1
August 3 - September 2	October	November 1
September 3 - October 2	November	December 1
October 3 - November 2	December	January 1
November 3rd - December 3	January	February 1
December 4 - January 1	February	March 1

Add in MTRS, Maris, or OBRA deduction code: Add any deductions that might be applicable such as MARIS, MTRS and/or OBRA deductions.

- Teacher's Retirement/ MTRS – deduction code 84 = 11%
- State Retirement/ MARIS/MSRB – deductions codes 83 = 9%, deduction code 86 = 2%
- OBRA – deduction code 96 mandatory = 7.5%
- OBRA – deduction code KV voluntary – XX%

OBRA Eligible employees - add 'Status Flag'

- Status Flag 1 - Plan 02 for Mandatory OBRA
- Status Flag 2 - Plan 03 for Voluntary OBRA

Make MLI and FLI Exempt –

- Valley is exempt from Family Leave Insurance and Medical Leave Insurance
- Select “Exempt/Do Not Calculate FLI/MLI” for both drop downs. – after employee in entered into ADP – very important

Family Leave Insurance ⓘ
Exempt/Do not calculate FL ▼

Medical Leave Insurance ⓘ
Exempt/Do not calculate MLI ▼

🔗 EMPLOYEE TYPE FOR QUARTERLY REPORTING ⓘ

○

Shut off SS

- Social Security taxable status (People>Pay>Pay Profile)
 - If the employee is SS exempt, click on the “Federal” section of the Pay Profile screen and select the “Do not calculate Social security” box. ONLY select this if the employee is not subject to social security as this cannot be reversed easily. The effective date should coincide with the employee’s hire date.

The screenshot displays the 'Tax Withholdings' section of a Pay Profile. The 'Federal' tab is selected and highlighted with a red arrow. Below this, the 'State' and 'Local' tabs are visible. The 'Federal' section shows 'Marital Status: Single', 'Additional Tax', and 'Exemptions: 2'. The 'State' section shows 'STATE: Massachusetts', 'TYPE: Worked In', and 'SUI/SOI: MA-02-Massachusetts'. The 'Local' section is empty. Below the tabs, the 'Changes to Federal Tax Calculation' section contains several checkboxes: 'Do not calculate Federal Income Tax', 'Do not calculate FUTA Taxable', 'Employee Access to Form W-4 (IRS Lock-In)', 'Block the employee from updating the Form W-4 federal tax exemptions', 'Social Security/Medicare', 'Do not calculate Social Security' (checked and highlighted with a red box), and 'Do not calculate Medicare'.

Additional Work Schedule Details:

- Navigate to the People> Employment> Employment Profile screen then click the edit icon that will appear in the upper right-hand corner of the “Work Schedule” section to populate the following fields for informational purposes only.
 - FTE
 - Scheduled Hours

Add prorated sick time off

- Use the Google Sheet “Employee Status Changes” and navigate to the “prorate sick – new hire” tab. Add new hire to the bottom of the sheet and calculate the number of hours owed. Then in ADP go to People > Time OFF > TIME OFF BALANCES – click on sick>transactions> make adjustment – enter in the amount of prorated sick time upfront the employee is owed and enter a note stating “Prorated Sick Time Upfront”

Add prorated personal time off

- If an employee is hired between July and through December, no change is needed as the system will generate the correct amount of personal time off (2 days in hours) when the policy is assigned.
- If an employee is hired between January and through the end of May, the system will generate the incorrect amount of personal time off when the policy is assigned. The employees hired during this timeframe should only receive one day (to be converted to hours). Go to People > Time OFF >

TIME OFF BALANCES – click on Personal>transactions> make adjustment (deduct one day in hours)

- If an employee is hired in the month of June, the system will generate the incorrect amount of personal time off when the policy is assigned. The employees hired during this timeframe should NOT receive any personal time off. However, the policy still needs to be assigned as the system will correctly generate two days on July 1st. Go to People > Time OFF > TIME OFF BALANCES – click on sick>transactions> make adjustment – deduct the two days in hours

Benefit Enrollments – GIC HEALTH & DENTAL (for eligible employees):

- People>Benefits>Enrollments - **This is only for GIC health and/or dental. All other benefits are handled through payroll deductions.**
- On the Enrollments page, select the plan type on the left then click the “ACTION” icon then “view/enroll” next to the plan you would like to enroll the employee in.



- Populate the effective date for the benefit then click DONE. The system will automatically ensure the benefit deduction populates in the employee's pay profile screen 2 payrolls prior to the effective date indicated for the benefit for medical, dental and vision.
- Populate the coverage level for this benefit in the drop down box, which will automate the other fields to display the cost breakout
- Deduct from Payroll will automatically be selected to ensure the employee will have the employee premium withheld from their paycheck.
- Populate the Change reason for the enrollment in the drop down box
- Click “ENROLL” at the bottom of the screen

Add Enrollment - Health and Welfare (Medical): TUFTS HEALTH PLAN, TUFTS HEALTH PLAN SPIRIT, POST JULY 1 2003

Enrollment Details

Coverage Level: **Employee** 8

Cost Period: **Monthly**

Employee Cost: **142.20**

Employer Cost: **426.58**

Total Cost: **568.78**

Enrollment Start Date: **11/1/2018**

Enrollment End Date:

Eligibility Date: **11/1/2018**

New Signature Date: **1/10/2019**

Dependents

ENROLLED	DEPENDENT NAME	RELATIONSHIP	START DATE	END DATE	ACTION
There are currently no entries.					

Deduction Information

i This employee position is not paid by ADP.

Deduct from Payroll: ☒ Yes ☐ No b

COMPANY CODE	FILE NUMBER	PAY FREQUENCY	DEDUCTION CODE	AMOUNT	FREQUENCY	EXISTING TIMELINE

Change Reason: **REENROLL - Re-Enrollment** c

CANCEL ENROLL d

-
- If the employee is benefits eligible and you select the “Proceed to Enrollments” option, this will automatically navigate you to the benefits enrollment screen to enroll the employee in benefit plans.

DONE – NEW HIRE COMPLETE

ADP System Onboarding –Rehire

Valley Collaborative uses Automatic Data Processing (ADP) as its comprehensive payroll and HR system and as such all new hires must be entered into ADP by following the below steps:

- Log into [ADP’s Workforce Now Administrator web portal](#)
- Navigate to “Process”, “HR”, “Hire/Rehire”, choose “Rehire”, and then
- Follow the rehire wizard and update/confirm/edit all fields.
- Once all fields have been confirmed/edited/updated with the rehire wizard, navigate to the following pages to update all sections:

- People > Employment Profile - if applicable, update:
 - Custom Fields
 - Additional Earnings
 - Time & Attendance
 - Corporate Groups > Home Cost Number & Allocations
 - Work Schedule
- People > Personal Profile - if applicable, update:
 - Emergency Contacts
- People > Pay Profile- if applicable, update:
 - Deductions – add/edit all retirement deductions and benefit deductions
 - Direct Deposit – ensure banking information is updated
 - Tax Withholding > Federal & State – update to recent elections
 - Other Pay Settings
 - Clock & Data
 - Status Flags
 - Custom Areas
- People > Time & Attendance > Schedule – if applicable, update:
 - Assign correct daily schedule
- People > Time Off > Policy Assignment – if applicable, update:
 - Assign new time off policies and ensure balances are correct
- People > Benefits > Enrollments – if applicable, update:
 - Enroll in new medical or dental

Goals - for FSA and DPC plans

People → Pay → Pay profile

In the “Deductions” Box, there is a “Goals” button. Click on this.

A new tab will open, click “Add Deduction Goal”

Choose the deduction to link the goal with “FSA” or “DPC”, and enter the new goal amount.

Click save

If a court order for a garnishment/child support order/lien is received for this employee, add the agency in the PAYEE validation table (Setup>Tools>Validation Tables>Payees (under the Wage Garnishments section). Then add the appropriate garnishment deduction. **Don’t forget to add a deduction goal limit for any liens that have a repayment amount (i.e. tax levy and garnishments).

The screenshot shows a payroll system interface. At the top, there's a 'Show as of' date field set to 1/10/2019, with a red arrow pointing to it. Below this, there are three main sections: Regular Pay, Deductions, and Direct Deposits. The Regular Pay section shows a gross pay of \$16,430.00, an annual salary of \$34,174.40, and a biweekly pay frequency. The Deductions section shows a table with columns for Description, Category, and Amount. The Direct Deposits section shows a table with columns for Description and Amount.

DESCRIPTION	CATEGORY	AMOUNT
B3-STATE RETIR...	Other	9.00000%
B6-STATE ADOL ...	Other	2.00000%
DV-dental vision	Other	2.98
GIC-GIC HEALTH	Other	63.37

Company code T4P new hires:

Need New hire sheet, I9, tax forms, direct deposit forms to enter. Get from Dave Illg, Scott Morin, Matt Gentile.

Process → HR → Hire/Rehire
Select "New Hire"
Select "Payroll Only" (System)

Section 1 – Personal

Enter First and Last Name
Enter SSN
Enter Hire Date
Enter Reason for New Hire
Company code – T4P
Language – English
Gender
Birth Date
Enter Address
Enter any relevant personal contact information

Section 2 – Employment

Enter File# - Last 6 digits of the person's SSN*** very important
Worker Category – pick appropriate
Location – pick appropriate
Home Department – pick appropriate Site from New Hire form (only use 200 Scott, 400 Dave, 500 Matt)
Click Home Cost Number on the right hand side in the "More Fields" box
Pick home cost number from drop down field (DDS Adults = 01.500.3520.03.5182; Site 3= 01.200.3520.03.5181; Site 1 & 2 = 01.400.3520.03.5181)

Section 3 -- Payroll

Pay Frequency – Biweekly
Regular Pay Rate – Hourly

Valley Collaborative
Human Resources Policy & Procedures Manual
Page 34 of 63

\$15.50 minimum wage for Adults, \$5 for students
Rate 2 - \$15.50 for Adults, \$10 for students
Basis of Pay – Hourly
Period End Date 1

Section 4 - Tax

Federal Filing Status – enter from W4
Worked in State – MA
SUI/SDI Code – MA
State Marital Status – enter from W4 and M4 state tax form
State Exemptions – enter from M4 state tax form

Click “Done”
Employee is now entered in ADP

Now you need to go to their pay profile to make updates***

People → Pay → Pay Profile

Enter Direct Deposit Information under the “Direct Deposit” field
Enter Effective Date
Pick proper deduction code depending on what type of account you are setting up
Enter Routing #
Enter Account #
Click “Done”

Now, shut off MLI and FLI, as they should not be deducted as Valley is exempt.

In the same pay profile screen, click on the State Tax box
Click on SUI/SDI Tax Code hyperlink (typically MA-02-Massachusetts)
Under the “Family Leave Insurance” and “Medical Leave Insurance” dropdowns, select “Exempt” for both
Click done

Employee is now fully entered into ADP company code T4P.

Follett Aspen System Onboarding

Valley Collaborative uses Follett’s Aspen program as its student information system and as such, all new hires must be entered into the Aspen system by following the below steps:

- Log onto [Aspen](#)
- Click on ‘Staff’ on menu at top of screen
- Click on ‘Options’ and choose ‘Add’

- Enter information on the Valley Collaborative Default Template (located on the right)
- Enter First Name, Last Name, Gender, Date of Birth, primary email address (use the employee's Valley email address). Navigate to the drop down and choose the school the new employee will be working in. Add the local ID and the MEPID number in the state identifier field, go to the drop down for Type and choose the position for the employee, check off Special Education box. Make sure Status is 'Active' and then put in the hire date for the staff member. Click 'save' button at the bottom of the screen.
- Navigate to the 'Ethnicity' tab next to the Demographics tab.
- Look to the right of the screen and click on the 'Add' button.
- Click on the Race code drop down menu and click on the ethnicity and click on the 'ok' button.
- Always remember to click on the 'save' button at the bottom to save your information.
- Click on the drop down where it says 'Valley Default Template' on top right of screen.
- Choose EPIMS SIF Template.
- You are in the Staff Record (SR01-SR38) tab.
- SR09 Status should be 'Active' (drop down menu)
- SR01 MEPID number
- Make sure that SR08 (Ethnic Code) copied from Valley Default Template. If not, enter race code in again.
- Go to SR11 Date of Hire and enter
- Go to SR38 Beginner Educator and check this box off if they are in the first year of a new role.
- Make sure you click on 'save' at the bottom of the page.
- Navigate to the 'Work Assignments (WA01-WA12) tab.
- SR09 should say 'Active'
- Click on 'Add' button for WA06-WA12 Staff Positions
- WA06 Fill in School
- WA07 Fill in Job Classification
- Always click SIF SFP Primary Assignment
- WA08 Assignment
- Subject are Course - Leave Blank
- WA12 FTE - Fill in
- Do not enter End Date
- Nothing in Adjusted District ID
- Exclude from EPIMS should only be checked off for Today & Tomorrow Staff Members
- Complete all staff education fields

eSped System Onboarding

Valley Collaborative uses the eSped program for all of its special education document needs and as such, select new hires (as identified on the New Hire Request Form) must be entered into the eSped system by following the below steps:

- eSped set up for Teachers & Therapists
 - Users
 - Create/Edit Users
 - New

- Email
- First Name
- Last Name
- Role - Dropdown
- First Restriction Values: enter school staff works at - Add
- Save - employee will receive an invitation from eSped to set up their account.

Caseload Tracker System Onboarding

1. New hire Social Workers, Physical Therapists, Occupational Therapists, Speech Language Pathologists, Guidance Counselors, and BCBAs who provide therapeutic services for Valley Collaborative are provided with a Therapy Caseload Tracker google sheet.
2. HR communicates with David Illg, Assistant Principal, the new hire therapist's first and last name
3. David Illg populates new hires name into Google and emails the new hire a link to complete a Google Form
4. The new hire therapist completes the emailed Google Form
5. Once complete, the new hire therapist will then receive an email to access his/her google Therapy Caseload Tracker 'workbook.' for tracking direct and indirect IEP services provided to Valley students as well as additional programmatic job responsibilities to be logged in the miscellaneous column
6. The new hire therapist enters direct and consultative IEP services into the Therapy Caseload Tracker, as well as additional programmatic job responsibilities to be logged in the miscellaneous column

Staff Evaluation Tracker System Onboarding

All Valley Collaborative staff are evaluated annually regarding his/her job performance

1. Non-professional staff are evaluated using a Valley Collaborative developed evaluation tool with 8 outlined criteria for discussion, long with an open dialogue box for overall comment.
 - a. Principal/Supervisor initiates the evaluation process each spring and completes the evaluation tool.
 - b. Then, Principals/Supervisors and staff conference to review the evaluation, provide commentary as well as feedback, and gather signatures and dates as acknowledgement.
2. Professionally Licensed Staff are evaluated using the Department of Elementary and Secondary Education (DESE) rubrics to ensure each professional's performance aligns with state standards, indicators, and elements.
3. The DESE Educator Evaluation Process is accessed via an employee's Valley Collaborative Google log-in and lives in Google Drive.
4. HR emails David Illg, Assistant Principal, that a new hire who is required to complete a DESE Educator Evaluation has begun employment with Valley Collaborative and provides Mr. Illg with the new hire's first name, last name, and supervisor.
 - a. If new hire employee is hired after January 1 of a calendar year, he/she is exempt from Educator Evaluation process for that school year
5. New Hires are subject to participate in a one year DESE Educator Evaluation cycle as they are 'in a new assignment'
6. Valley Collaborative's One year educator plan is an 11 Step process and the timeline for this process spans one school year (10 months)

7. Professionally Licensed New Hires need to begin the process by completing Step 1 via the following link: <https://forms.gle/hJxtRZNkgvK5es9F6>.
8. Once a new employee has access to his/her workbook, he/she can begin the annual process, outlined below:
 - Step 1: Self-assessment & Educator Evaluation Information
 - Step 2: Goal Setting
 - Step 3: Educator Initiated Educator Plan
 - Step 4: First Observation
 - Step 5: Artifacts (1st Set)
 - Step 6: Formative Evaluation
 - Step 7: Educator Response Form
 - Step 8: Second Observation
 - Step 9: Artifacts (2nd Set)
 - Step 10: Summative Evaluation
 - Step 11: Educator Response Form

Mentor Program Tracker System Onboarding

All school districts are required to provide an induction program for educators in their first year of practice. Valley Collaborative Human Resources representatives must notify Induction and Mentor Program Coordinator of New Hire.

First Aid/CPR/MAP Certification System Onboarding

Valley Collaborative Lead Nurse is to be notified of all new hires. The New hire's MAP/First Aide/CPR data is entered into "Employee Training and Clear to Work" spreadsheet columns.

Restraint Training Tracker System Onboarding

Valley Collaborative Restraint Trainers are to be notified of all new hires. The New hire's restraint training data is entered into "Employee Training and Clear to Work" spreadsheet columns.

Medical Waiver Tracker System Onboarding

<https://tinyurl.com/Valley-Medical-Waiver>

All eligible Valley Collaborative employees are offered medical benefits through the GIC. If an employee chooses to waive this benefit, Valley Collaborative offers \$1000 annual incentive. The "Employee Waiver/Election Form/Compensation Reduction Agreement" must be completed when an employee elects to either (a) waive all pre-tax benefits or (b) enroll in a pre-tax benefit deducted from their compensation for their medical care coverage premium amount.

If an employee chooses to waive this benefit and indicates so on the form, HR must enter them into Infinite Visions and ADP.

Human Resources/Payroll Personnel enter the employee in the "Employee Status Changes" Google sheet on the Medical Waiver tab (Appendix N).

Current Staff Changes (change forms & salary action notices)

Staff Contract/Position Changes Checklist

☐	Change form completed by Supervisor
☐	Draft new employee agreement
☐	If Exempt, complete pay breakout
☐	E-mail new employment agreement to employee with attached pay breakout if applicable and cc Principal
☐	Once employee agreement is returned, enter change on "Employee Changes" Google Sheet on the Payroll Items Tab
☐	Verify if GIC benefits will be affected. Communicate changes with employee
☐	Complete GIC Form 1A and mail, if needed.
☐	Change ACA Status
☐	Benefit Eligibility/COBRA Info Sent
☐	Employee Market Place Notice

IVEE

☐	Employee Maintenance – General Information – change primary job title
☐	Employee Positions & Pay – update description and control code.
☐	Employee Positions & Pay – Information Tab – change DAC, position type, position category, supervisor, contract
☐	Employee Positions & Pay - Actions – set salary schedule, change pay
☐	Employee Positions & Pay – Pay Tab – pay basis, hours per day, work calendar, position dates, pay periods, change account number – click "skittle" button.
☐	Employee Positions & Pay – Distribution Tab – verify regular amount and use the amount to populate "regular pay rate amount" in ADP

ADP

☐	Change MTRS/MARIS if applicable
☐	Change all applicable pay rates
☐	Change timeclock fields if applicable
☐	Search for the employee's name in the search bar in the right hand corner
☐	Click People – Employment – Employment Profile
☐	Employment Profile – Position – Edit – choose effective date, change all appropriate fields such as job title, job reason, click management position if applicable, NAICS Worker's Comp,

☐	Employment Profile – Corporate Groups – Edit – choose effective date, change reason, change all applicable fields such as Home Department, Home Cost Number
☐	Employment Profile – Work Schedule – Edit – choose effective date, change all applicable fields such as FTE
☐	Employment Profile – Regular Pay – Edit – choose effective date, change reason, change all applicable fields such as regular pay rate amount (from IVEE), basis of pay, standard hours (for salary individuals only not hourly), click on more rates (to the right of rate 2) → rate 6 = (MARIS) hours per week, rate 7 = (MTRS & MARIS) annual salary full year FTE 1.0
	Employment Profile – Time and Attendance – Edit – choose effective date, toggle using time and attendance if applicable (hourly employees changing to salary must have time and attendance toggled off.) , chose pay class if applicable, chose supervisor, toggle if the employee is now in a supervisor position,
	Employment Profile – Custom Fields – Edit – change work calendar and hours per day if applicable
	Click People – Pay – Pay Profile
	<p>Pay Profile – Other Pay Settings – Clock and Data Control – choose effective date, choose appropriate code for “Full”</p> <ul style="list-style-type: none"> • <u>Clock</u>: Identifies the FTE % and contract term for employees for the MTRS report. **This field can be maintained on the “Pay Profile” screen and under the “clock & Data control” area. • <u>1st three numbers</u>: Indicates the FTE % (i.e. 100 = FTE 1 or 100%, 060 = FTE 0.6 or 60%, etc) <u>Last 2 numbers</u>: value of 10 or 12 to indicate whether the employee is contracted for 10 months or 12 months. EXAMPLE: FTE=1.0 & WORK CALENDAR = 212 > CLOCK CODE=10012 EXAMPLE: FTE=0.6 & WORK CALENDAR = 182 > CLOCK CODE=06010 • <u>Data Control</u>: Identifies whether the employee is enrolled in MARIS or MTRS Retirement plans. This information is used to qualify whether an employee should be included on MARIS or MTRS files. **This field can be maintained on the “Pay Profile” screen and under the “clock & Data control” area.
☐	<p>If the employee will now be contributing to State Retirement go to Pay Profile – Other Pay Settings – Custom Areas – choose effective date</p> <ul style="list-style-type: none"> • <u>Custom Area 1</u>: Identifies whether an employee is contributing 8% or 9% to MARIS retirement to ensure the appropriate code appears on the MARIS files. **This field can be maintained on the “Pay Profile” screen and under the “custom area” section. Input the value “RSB004” if the employee is contributing 8% toward MARIS Input the value “RSB005” if the employee is contributing 9% toward MARIS
☐	People – Time Off – Policy Assignments – Change any policy assignments impacted by the staff/contract change

Does the Employee now require new trainings? Update the Training and Clear to Work Google Sheet

		DATE ENTERED	NOTES
☐	MVR		
☐	Restraint Training Certificate		
☐	First Aid Training Certificate		
☐	CPR Training Certificate		

Is the employee entered into all Valley systems?

☐	ADP
☐	IV
☐	ASPEN
☐	Mandated Trainings
☐	Caseload Tracker
☐	Ed. Eval Tracker
☐	Mentor Program Tracker
☐	eSped
☐	Primary Licenses
☐	Employee Training & Clear to Work

Do other Departments/Valley Staff need to be notified of this change?

☐	Technology
☐	Facilities
☐	Nursing
☐	Restraint Trainers

Staff Contact Information Changes

<https://tinyurl.com/Valley-Employee-Info-Change>

Current employees who need to update contact information must complete an “Employee Information Change Form” and submit it to the Human Resources Department. The Human Resources representative must then update this information in all impacted Valley Systems (Appendix V).

Staff Contract/Position Changes

<https://forms.gle/8QxsarQYbDn9yaTr8>

Supervisors who would like to offer a new position to current employees must first receive approval from the Executive Director. Supervisors must then complete a “Staff Contract/Position Change Form” which submits information to the Human Resources Department.

The Human Resources/Payroll Personnel must draft a new employee agreement and if the change results in the employee now becoming or continuing to be an exempt employee, complete a pay breakout. The employee agreement and pay break out (if applicable) should be emailed to the employee, cc’ing the supervisor. Once signed and sent back to the Human Resources Department, this information is then used to update IVEE and ADP. Once the employee agreement is returned, enter the change on “Employee Changes” Google Sheet on the Payroll Items Tab.

IVEE

Employee Maintenance – General Information – change primary job title
Employee Positions & Pay – update description and control code.
Employee Positions & Pay – Information Tab – change DAC, position type, position category, supervisor, contract
Employee Positions & Pay - Actions – set salary schedule, change pay
Employee Positions & Pay – Pay Tab – pay basis, hours per day, work calendar, position dates, pay periods, change account number – click “skittle” button.
Employee Positions & Pay – Distribution Tab – verify regular amount and use the amount to populate “regular pay rate amount” in ADP

ADP

Search for the employee’s name in the search bar in the right hand corner
Click People – Employment – Employment Profile
Employment Profile – Position – Edit – choose effective date, change all appropriate fields such as job title, job reason, click management position if applicable, NAICS Worker’s Comp,
Employment Profile – Corporate Groups – Edit – choose effective date, change reason, change all applicable fields such as Home Department, Home Cost Number
Employment Profile – Work Schedule – Edit – choose effective date, change all applicable fields such as FTE
Employment Profile – Regular Pay – Edit – choose effective date, change reason, change all applicable fields such as regular pay rate amount (from IVEE), basis of pay, standard hours (for salary individuals only not hourly), click on more rates (to the right of rate 2) → rate 6 = (MARIS) hours per week, rate 7 = (MTRS & MARIS) annual salary full year FTE 1.0
Employment Profile – Time and Attendance – Edit – choose effective date, toggle using time and attendance if applicable (hourly employees changing to salary must have time and attendance toggled off.) , chose pay class if applicable, chose supervisor, toggle if the employee is now in a supervisor position,
Employment Profile – Custom Fields – Edit – change work calendar and hours per day if applicable
Click People – Pay – Pay Profile

Pay Profile – Other Pay Settings – Clock and Data Control – choose effective date, choose appropriate code for “Full”

- Clock: Identifies the FTE % and contract term for employees for the MTRS report. **This field can be maintained on the “Pay Profile” screen and under the “clock & Data control” area.
- 1st three numbers: Indicates the FTE % (i.e. 100 = FTE 1 or 100%, 060 = FTE 0.6 or 60%, etc)

Last 2 numbers: value of 10 or 12 to indicate whether the employee is contracted for 10 months or 12 months.

EXAMPLE: FTE=1.0 & WORK CALENDAR = 212 > CLOCK CODE=10012

EXAMPLE: FTE=0.6 & WORK CALENDAR = 182 > CLOCK CODE=06010

- Data Control: Identifies whether the employee is enrolled in MARIS or MTRS Retirement plans. This information is used to qualify whether an employee should be included on MARIS or MTRS files. **This field can be maintained on the “Pay Profile” screen and under the “clock & Data control” area.

If the employee will now be contributing to State Retirement go to Pay Profile – Other Pay Settings – Custom Areas – choose effective date

- Custom Area 1: Identifies whether an employee is contributing 8% or 9% to MARIS retirement to ensure the appropriate code appears on the MARIS files. **This field can be maintained on the “Pay Profile” screen and under the “custom area” section.
Input the value “RSB004” if the employee is contributing 8% toward MARIS
Input the value “RSB005” if the employee is contributing 9% toward MARIS

People – Time Off – Policy Assignments – Change any policy assignments impacted by the staff/contract change

- Time & Attendance Schedule
 - For Hourly employees, navigate to People>Time & Attendance>Schedule Templates then find the appropriate schedule and click the “manage assignments” option.

The screenshot shows the 'Schedule Templates' interface. At the top, there's a header with 'Schedule Templates' and a search bar. Below the header, there's a 'Templates' section with a 'CREATE NEW' button. A table lists templates with columns: NAME, DESCRIPTION, STATUS, ACCESS, and ASSIGNED EMPLOYEES. The first row is highlighted, and a red box is drawn around the 'Manage Assignments' link in the 'ASSIGNED EMPLOYEES' column.

NAME	DESCRIPTION	STATUS	ACCESS	ASSIGNED EMPLOYEES
10am-6pm M-F	10am - 6pm M-F	Active	Public	1 Manage Assignments
11am-2pm MW Sa...	11am - 2pm MW, 8am - 2pm T...	Active	Public	1 Manage Assignments
1pm - 9pm M-F	1pm - 9pm M-F	Active	Public	2 Manage Assignments
6:15am-2:15pm M-F	6:15am - 2:15pm M-F	Active	Public	2 Manage Assignments
6:30am-2:30pm M-F	6:30am - 2:30pm M-F	Active	Public	7 Manage Assignments
6am - 1:30pm M-F	6am - 1:30pm M-F	Active	Public	1 Manage Assignments
6am-2pm M-F	6am - 2pm M-F	Active	Public	3 Manage Assignments

On the next screen, check mark the box next to the new employee and click the “NEXT” Button

FMLA

<https://www.dol.gov/whd/fmla/forms.htm>

The Family and Medical Leave Act of 1993 (FMLA) is a United States labor law requiring covered employers to provide employees with job-protected and unpaid leave for qualified medical and family reasons. All Valley Collaborative employees are entitled to this protection.

The FMLA entitles eligible employees of covered employers to take unpaid, job-protected leave for specified family and medical reasons with continuation of group health insurance coverage under the same terms and conditions as if the employee had not taken leave.

Eligible employees are defined as employees who have already worked 12 months on the job AND 1250 hours from date the employee requests the FMLA. Eligible employees are entitled to:

- Twelve workweeks (60 scheduled work days) of leave in a 12-month period for:
 - the birth of a child and to care for the newborn child within one year of birth;
 - the placement with the employee of a child for adoption or foster care and to care for the newly placed child within one year of placement;
 - to care for the employee’s spouse, child, or parent who has a serious health condition;
 - a serious health condition that makes the employee unable to perform the essential functions of his or her job;
 - any qualifying exigency arising out of the fact that the employee’s spouse, son, daughter, or parent is a covered military member on “covered active duty;” or
- Twenty-six work weeks of leave during a single 12-month period to care for a covered service member with a serious injury or illness if the eligible employee is the service member’s spouse, son, daughter, parent, or next of kin (military caregiver leave).

Any Valley employee who misses 5 days of work due to a medical related issue, his/her manager must contact the Human Resources Department and Human Resources then reaches out to employee.

HR sends employee appropriate FMLA form (WH-380-E/WH-380-F/WH-381/WH-382/WH-384/WH-385/WH-385-V) to complete and return to HR.

Once employee submits FMLA form, HR has **ONLY 5** days to make determination on eligibility for FMLA and, if appropriate, issue Valley FMLA Approval Notice to employee. This notice is emailed to employee and is stored electronically in the employee's electronic personnel file in ADP under "Employee Documents".

HR enters the employee's name onto the FMLA tab in the Employee Status Changes Google Sheet with the anticipated start date of his/her leave.

If employee has elected Short Term Disability, HR emails employee contact information for the Hartford, along with Valley Collaborative's policy number to reference for his/her leave. Claims can be opened with the Hartford up to 30 days in advance of a short term disability.

- The Hartford will request a verification via the zip portal for all employee claims/pre-claims
- The Human Resources Department must complete the verification form and deliver back to the Hartford via the zip portal within 2 days of receipt

Once an employee experiences an event which causes the FMLA to commence, the supervisor must email HR.

HR enters any sick/vacation/personal time into the employee's ADP leave plan.

HR enters the employee's last day of work on the Payroll Items Google tab and updates the FMLA tab with this date.

Pay breakout – All salaried Valley Collaborative staff who are anticipating an expected FMLA for an extended period of time will be given an anticipated pay breakout. This pay breakout will explain monies paid to the employee before the leave, monies the employee is owed upon return of his/her leave, and how their salary will be distributed throughout their expected leave time.

GIC Benefit Premiums - All employees who have been found eligible for FMLA and access Valley Collaborative's GIC benefits must submit benefit premium payments to Valley Collaborative by the 15th of each month he/she is on leave.

- HR communicates to Accounts Payable that an employee is expected to be out on FMLA and provides the anticipated date range of the leave along with a copy of the pay breakout for the employee.
- Accounts Payable drafts monthly invoices for the employee's GIC premiums and emails the invoices to the employee.
- Accounts Payable communicates to the employee that benefit premium payments are due by 15th of each month he/she is on leave.

*If an employee does not qualify for FMLA per employee handbook, the Collaborative will not continue to pay their portion of GIC premiums for the time they are out on leave; therefore, non-eligible employees will be responsible for 100% of his/her benefit premiums for the time they are on FMLA. Non-eligible employees will also be provided with monthly invoices for the GIC premiums, outlined above.

HR must notify MTRS of contributing employees who access FMLA in MyTRS as well as through the completion of the MTRS Leave of Absence Information form, which is then mailed to the Charlestown office. <https://mtrs.state.ma.us/wp-content/uploads/2018/02/leaveofabsenceinfo.pdf>

ADP Biweekly Payroll Procedures

Pay Data

A new “Pay Data” needs to be created weekly for any changes to F9Q regular payroll. This is an excel spreadsheet formatted by ADP to except any changes to regular payroll. A “Pay Data Template” is electronically stored in the Processes and Checklists electronic folder on the Valley shared drive at the following location:

Shared (V:) > 40 Linnell > HR_LINN > Processes and Checklists

Payroll Items

Every payroll, Valley Collaborative’s payroll representative checks the “Employee Changes” Google sheet. This Google sheet has many tabs. The “Payroll Items” tab tracks small payroll related items and can be sorted by pay period. For example, if an employee has a change in their 403(b) contribution, the Valley Collaborative Human Resources/Payroll representative would enter this information on the “Payroll Items” tab. **All** tabs on the **2021-2022 Employee Changes** sheet need to be reviewed before processing weekly payroll.

The following steps should be taken each biweekly payroll for company code F9Q:

Timeline	Action
Friday after a pay date	Confirm terminated employees who received their last pay last pay have been terminated
Friday after a pay date	Mark all items complete in Google sheet for that pay period

Monday of off payroll week	Unlock next pay and start new time cycle
Wed. prior to pay date at 9:00 a.m.	Attend HR/Payroll biweekly meeting. Analyze New Hires GIC 1 st premium deductions at HR/Payroll bi-weekly meeting. Ensure all new hires and contract changes are entered into ADP for the following pay date.
Thurs. or Friday prior to a pay date	Check “2023-2024 Employee Changes” to determine what information needs to be processed in the next pay cycle.
Thurs. or Friday prior to a pay date	Check Smart Compliance for any Pay Garnishments that need to take effect the next pay cycle.
Mon. - processing week before 8:00 a.m.	Run a “Timecard Exception Report” in ADP. Check report and email with supervisors who need to approve their timecards.
Mon. - processing week	Run a “Timecard with Supervisor Approval” report in ADP. Analyze all timecards that have supervisors’ approval and make all applicable corrections in timecards.
Mon. - processing week	Run an “Employee Total Hours Report” in ADP. Check total hours and breakdowns for each employee.
Mon. - processing week	Once all timecards are approved and analyzed – Process → Payroll Dashboard → Manage All Time Cycle and lock the time cycles → start new time cycle (ensure dates are correct) → go back to Payroll Dashboard → Manage payroll → +Add time/time off worksheet and click on include pay group 1 and pay group 2 and add the worksheets. Go back to manage payroll and validate any worksheet
Mon. - processing week	Check all emails for pay date specific communication from supervisors (i.e. unpaid time off, paper timesheets, etc.)
Thurs. or Friday prior to a pay date	Create a “Pay Data” spreadsheet for any changes to regular payroll for the next pay cycle (i.e. vacation payout for terminating employees) and ensure it is saved as CSV and names using the following naming convention” EPIf9qAA (whereas AA equals ADP week #) Import pay data. Process → Utilities → Import → Pay Data → +Add → Browse For Files → Add Files → Upload → Checkbox → Done → Checkbox → Other Actions → Start If errors, fix the errors on the file. Delete the file from Paydata screen by checking box and clicking “delete”. The file also needs to be removed from payroll by going to payroll dashboard and find the worksheet created (usually name epi000) and clicking the three dots to the right of the worksheets and then “delete”. Once the paydata has been fixed and removed from both locations, re-import the file using the directions above. Once the paydata has been imported successfully and the status column is listed as “completed”, move onto the next step. The file automatically goes to payroll dashboard as a “worksheet”.
Mon. or Tues. prior to a pay date	Payroll Dashboard → Manage Payroll → Ensure all worksheets are correct → Calculate Payroll → View Details → Click on payroll register (excel) and download selected. Check downloaded register for all special pays including stipends, stem, phone, travel, and extra hours payments. New hires and Terms - vacation payouts. Check all sheets on HR/Payroll Google Sheets. Run all ADP reports. No FLI/MLI deductions, SS for 3 employees only (C.Dunn, Jasilewicz, Baxter) To remove retirement deductions – got to Payroll Dashboard > Manage Payroll > click on the pay data worksheet > if employee is not there > Insert Employee, if employee is there, >Insert column > special action > now on the corresponding employee row, choose special action column drop down to special action “K – bypass mainframe special calcs”
Mon. or Tues. prior to a pay date	Review corrections to the payroll register with Deputy Director or Executive Director for approval
Tues. prior to pay date	Once you feel all corrections have been made – seek approval from Deputy Director or Executive Director to accept payroll>Payroll Dashboard> Accept Payroll

Analyzing Payroll Registers:

Once HR/Payroll personnel receives a payroll register from ADP, it must be analyzed. Once available, the payroll registers can be found by navigating to **Process > Payroll > scroll down to payroll registers**

- 1.) Go to company totals tab and ensure there are no FLI & MLI deductions in the deductions columns.
- 2.) Confirm any/all changes are correct using **all** tabs of the “2023-2024 Employee Changes” and cross referencing all data submitted on pay data
- 3.) Skim over the hour’s column for anything unusual.
- 4.) Once all corrections have been completed, review with Deputy Director or Executive Director prior to accepting payroll.

Traditional Payroll Steps/Timeline (T4P) – Service Center 0056 – Great lakes

Log into ADP (T4P Log in)

Entering a new hire:

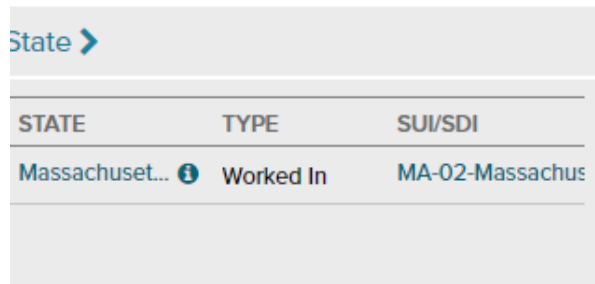
Process:

- HR – HIRE/REHIRE – PAYROLL ONLY (SYSTEM)
- PERSONAL
 - Name
 - Tax ID Type
 - Tax ID – Social Security Number
 - Re-enter Tax ID – Social Security Number
 - Hire Date
 - Reason for Hire – Dropdown: Existing Position
 - Company Code – Dropdown: T4P
 - Gender
 - Birth Date
 - Correspondence Language – Dropdown: English

- Address
 - Country – Dropdown: United States
 - Address 1
 - Address 2 (if needed, Apartment #)
 - City
 - State/Territory
 - Postal Code
- Work Address – N/A
- Contact Information – N/A
- Demographic – N/A
- Employment
 - File # - the last 6 digits of Social Security #
 - Job Title – N/A
 - Worker Category – Dropdown: Student
 - Business Unit – N/A
 - Location – Dropdown: select program
 - Home Department – Dropdown: select program
 - More fields on right side of screen – Home Cost Number
 - Home Cost Number Dropdown: select program
 - 200 = Site 3
 - 400 = Site 1 & Site 2
- Payroll
 - Pay Frequency – Biweekly

- Regular Pay Rate – Dropdown: Hourly; tab over & enter \$5.00
- Data Control – N/A
- Clock – N/A
- Rate 2 Amount - \$10.00
- Basis of Pay – N/A
- Tax
 - Federal Marital Status – Reference form completed by student
 - State Marital Status – Reference form completed by student
 - State Exemptions – Reference form completed by student
- Done
- Enter student's name in blue search bar in upper right corner of screen
- Click on little box next to student's name to get options
 - Select Pay option

- Pay Profile



State >		
STATE	TYPE	SUI/SDI
Massachuset... ⓘ	Worked In	MA-02-Massachus

- - Click on MA-02 Massachusetts
 - Change will be effective – Date of Hire
 - Family Leave Insurance – Dropdown: select Exempt/Do not calculate FLI
 - Medical Leave Insurance – Dropdown: select Exempt/Do not calculate MLI

- Direct Deposit
 - Click Add
 - Effective On – Hire Date
 - Deduction Code – Dropdown: select either checking or savings
 - Routing Number
 - Account Number
 - Prenote End Date – Company Default
 - DONE

Generating T4P Payroll:

*New WFN Layout (Trial – March 2022) Instructions:

- Process > Payroll Dashboard > Start New Payroll
- Process > Utilities > Import > Pay Data > +Add > Browse For Files > Add Files > Upload > Checkbox > Done > Checkbox > Other Actions > Start
- Process > Payroll Dashboard > Calculate Payroll > View Details > (righthand side) Checkbox Payroll Register (Excel)

*Previous WFN Layout Instructions:

- Go to: Process, Payroll, Payroll Cycle
- Select “start new cycle”
- Continue
- Confirm pay date is correct
- Email personnel responsible for student/adult timecard hours import that the pay cycle has been moved forward and ready for import. Typically, this staff person (Collette Elliott as of

09/29/2021) saves the file ready for import in the respective pay period folder on Tuesday morning of payroll week)

- To import the file, select “Add Paydata Batch”
- Select “Import from file”
- Click “+ ADD” (small font on left right above the list of files)
- Select “Browse for file”
- Select “Add file”
- Choose the file (Typically saved in the respective pay period folder on the shared drive and starts with “epit”)
- Select “Upload”
- Check box next to file name that you just uploaded and click “done”
- On next screen, choose the file you just uploaded by selecting the circle next to the file name and then click “run”
- Wait for it to process and then make sure “View/edit the paydata batch” is selected and select “done”
- Confirm number of hours on import with uploaded file.
- Select “Go to Payroll Cycle”
- Select “Preview Payroll”
- Download payroll register by scrolling to the bottom of the page and under the Download Reports section, select “Payroll Registers” and then “download”
- Confirm on register
 - Total number of hours
 - No FLI & MLI deductions
 - Review register.
- Accept.

Termination Process

When a Valley Collaborative employee notifies Human Resources of a voluntary resignation, Human Resources writes the employee a closeout letter. This closeout letter serves to close out the employee’s employment at Valley Collaborative and contains information on the employee’s termination date, details regarding his/her last pay, and may contain a pay breakout (salaried staff). This pay breakout will explain what monies the employee is owed and how their salary has been distributed throughout their work year. This letter will also provide an explanation of unemployment benefits through The Commonwealth of Massachusetts Executive Office of Labor and Workforce Development Department of Unemployment Assistance with “How to Apply for Unemployment Insurance Benefits” pamphlet. The letter will also contain information regarding Consolidated Omnibus Budget Reconciliation Act (COBRA) through the GIC. When distributing this letter to the employee, the employee’s Supervisor should also be notified.

Human Resources/Payroll personnel enters the employee onto the 2019-2020 Employee Status Changes Google Sheet in the Terminations tab.

Termination Check List:

- ☐ Entered into Employee Changes Google Sheet – Payroll Items and Termination Tabs
- ☐ Log into IV and retrieve control code for terminating employee
- ☐ Entered the control code into HR-IVEE Google Sheet and complete “replacing” column with the name of the terminating employee
- ☐ Scanned employee’s resignation letter into ADP
- ☐ Closeout letter
- ☐ Pay breakout (if salaried employee)
- ☐ “Unemployment Benefits” pamphlet
- ☐ GIC Form 1A mailed on:
- ☐ Hartford – Short Term Disability
- ☐ Email Technology Department
- ☐ Benstrat termination
- ☐ MTRS - Retirement termination
- ☐ Personnel files – Employees hired prior to 2015 - hard copies retrieved from back room & placed in termination cabinets

Valley Systems

- ☐ ADP
- ☐ IV
- ☐ ASPEN
- ☐ Therapist Caseload Tracker – email David Illg
- ☐ Teacher Educator Evaluation Tracker – email David Illg
- ☐ Teacher Mentor Program Tracker – email Chrystalia Metrakas
- ☐ Teacher - eSped
- ☐ Employee Training & Clear to Work
- ☐ DESE Primary Licenses

IVEE termination

In order to vacate a terminated employee from his/her position in Infinite Visions, the payroll representative must follow the following steps:

- Go to Employee Maintenance
 - Find the employee

- Action to Termination Wizard – click yes –
- From termination options complete the first four options
- Go to Positions & Pay - Highlight the position row then go up to actions and select “vacate record”
- If supplemental rows (i.e. Longevity, Medical Waiver, etc.) exist, highlight and delete

ADP termination

In order to terminate an employee from ADP, the payroll representative must follow the following steps in Workforce Now:

1. Go to Process - HR -Terminate.
2. Enter Employee Name.
3. Start termination wizard.
4. Add end date for insurance.
5. Cobra – no
6. Direct Deposit – Cancel next cycle
7. 182 employees who terminate in June (contract not renewed) need owed balance of salary paid to them.
8. Upload letter of resignation, closeout letter, pay breakout, and any invoices generated to Employee Documents

GIC termination

<https://tinyurl.com/GIC-Form-1A>

Valley Collaborative employees who resign and/or are terminated must complete the GIC’s Form 1A. In the event the terminating employee does not complete this form, Valley Collaborative Human Resources staff mail Form 1A to the GIC. This form cancels all health, dental, long term disability insurance, optional life insurance, and basic life insurance benefits (Appendix K).

HCSA/DCAP (FLEX) termination

The Human Resource/Payroll representative logs into the Benefit Strategies employer portal at:

<https://benstratemployer.navigatorsuite.com>.

Once in the portal, use the ‘Employees’ tab to update the employee’s status to ‘terminated’ and provide the status change date.

Short Term Disability

The Valley Collaborative Human Resources/Payroll representative logs into the Hartford web portal <https://employerview.hartfordlife.com/employerView> and enters the employee’s first and last name on the main page. Once the terminated employee’s information is retrieved, the representative can enter a termination date to update the status, immediately

Terminating Retirement Benefits

MTRS

The Human Resource Department representative must log into MyTRS and click on “update employee’s information.” From this screen, an employee’s last pay date can be entered and the employee’s status can be set to ‘non-contributing.’

MSRB

The Human Resource Department representative must note the termination date of a contributing employee in the MARIS system after the last payroll deduction is noted on a pay period end date report.

OBRA-457 Smart Plan

OBRA-457 Smart Plan Voluntary

Mass Mutual Voluntary

AXA Voluntary

ASPEN Termination

When Terminating Staff:

- Go to SR09 and change to ‘Inactive’
- Go to SR10 Reason for Exit
- Go to SR27 Put in Exit Date
- Make sure you ‘save’ the information at bottom (or top) of page.

eSped Termination

To terminate employee from eSped:

- Users
 - Create/Edit Users
 - Find - enter employee’s name
 - Click on email to open row - DELETE - OK

DESE Primary Licensure System Termination

If the new hire is a licensed educator and/or in a DESE licensed role, code them as “terminated” in the “DESE Primary Licensure” Google sheet located in the Human Resources Google Drive in “New Hire Process”

Mandated Trainings System Termination

Valley Collaborative Human Resources staff must code terminated staff in the Mandated Training Tracker as “terminated”

Caseload Tracker System Termination

Notify David Illg, Valley Collaborative Transitional High School, Alternative Programming, and Assistant Principal, of all terminations. David Illg, manages the creation and maintenance of the Caseload Tracker System.

Educator Evaluation Tracker System Termination

Notify David Illg, Valley Collaborative Transitional High School, Alternative Programming, and Assistant Principal, of all terminations. David Illg, manages the creation and maintenance of the Educator Evaluation Tracker System.

Mentor Program Tracker System Termination

Notify Valley Collaborative’s Induction and Mentor Program Coordinator of all terminated employees. The Induction and Mentor Program Coordinator manages the creation and maintenance of the Mentor Program Tracker System.

Employee Training and Clear to Work

Code all terminated employees as terminated in “Employee Training and Clear to Work” Google sheet

Medical Waiver Tracker System Termination

Upon an employee’s termination from Valley Collaborative who was eligible to receive the medical waiver, the Human Resources representative accesses the “Employee Status Changes” Google sheet and navigates to the “Medical Waiver” tab. This representative then enters the terminating employee’s termination date onto this tab.

Unemployment Insurance

In accordance with Massachusetts Employment and Training Law, Valley Collaborative provides a copy of the guide “How to apply for Unemployment in Massachusetts” to each of our employees who separate from work, permanently or temporarily. Please note, decisions regarding eligibility for and amounts of unemployment benefits are made by the relevant state agency, not by the Collaborative.

- Human Resources Department is contacted by Unemployment Insurance via the Massachusetts Division of Unemployment Assistance: Employer Login online portal of employees who separate

from work from Valley Collaborative and who apply for unemployment benefits with Massachusetts.

- Human Resources representative must log into the Massachusetts Division of Unemployment Assistance Employer Login online portal and check the correspondence and inbox tabs for communication regarding applicants for unemployment insurance.
- Questionnaires must be completed via the Massachusetts Division of Unemployment Assistance Employer Login online portal and submitted by the timeframe requested by the Department of Unemployment

Employment Verifications

The Human Resources Department provides a variety of employment verifications for current and previous employees. Verifications that are received via fax, phone, and/or email (with consent from a Valley employee) are returned to the requester within 5 business days from the date of the original request. Once an employment verification is completed, a copy of the verification is stored electronically in the employee's electronic personnel file in ADP under "Employee Documents".

Personnel Records

A personnel record is a record that identifies an employee to the extent that the record is used or has been used or may affect or be used relative to that employee's qualification for employment, promotion, transfer, additional compensation or disciplinary action. Personnel records include:

- Name
- Address
- Date of birth
- Job title and description
- Rate of pay and any other compensation paid to the employee
- Starting date of employment
- Job Application, resumes
- Performance evaluations
- Warnings and discipline
- Waivers and agreements signed by the employee
- Probationary period
- Dated termination notices

Valley Collaborative shall notify an employee within 10 days of the employer placing in the employee's personnel record any information to the extent that the information is, has been used or may be used, to negatively affect the employee's qualification for employment, promotion, transfer, additional compensation or the possibility that the employee will be subject to disciplinary action.

Valley Collaborative, after receiving a written request from an employee, shall provide the employee with an opportunity to review such employee's personnel record within 5 business days of such request. The review shall take place at the place of employment and during normal business hours.

A Valley Collaborative employee shall be given a copy of the employee's personnel record within 5 business days of submission of a written request for such copy to the employer. Valley Collaborative is not required to allow an employee to review the employee's personnel record on more than 2 separate occasions in a calendar year; provided, however, if Valley Collaborative places negative information in the file, the employee can review the file and that review does not count toward the two reviews per calendar year limit.

Valley Collaborative shall retain the complete personnel record of an employee as required to be kept without deletions or expungement of information from the date of employment of such employee to a date three years after the termination of employment by the employee. In any cause of action brought by an employee against Valley Collaborative in any administrative or judicial proceeding, including but not limited to, the Massachusetts Office of Affirmative Action, the Massachusetts Commission Against Discrimination, Massachusetts Civil Service Commission, Massachusetts Labor Relations Commission, attorney general, or a court of appropriate jurisdiction, Valley Collaborative shall retain any personnel record required to be kept under this section which is relevant to such action until the final disposition thereof.

If there is a disagreement with the information in a personnel file, removal or correction may be mutually agreed upon by the employer and employee. If there is no mutual agreement, the employee may submit a written statement explaining the employee's position which shall become part of the employee's personnel file.

Suitability Determination Procedures

Valley Collaborative retains documentation of the review of an employee, applicant, subcontractor, laborer, school transportation provider, or volunteer's national criminal history check results for the duration of an employee's employment or for seven years, whichever is longer. The documentation must include, and is limited to, the following:

- (a) The name and date of birth of the employee or applicant;
- (b) The date on which the school employer received the national criminal history check results; and,
- (c) The suitability determination (either "suitable" or "unsuitable").

Documentation to be provided upon request: Valley Collaborative must provide a copy of the documentation of the suitability determination of an individual to another school employer, or to the individual, upon request of the individual for whom Valley Collaborative conducted a suitability determination.

Reliance on a Favorable Suitability Determination: When an individual for whom a school employer or the Department of Elementary and Secondary Education has made a suitability determination applies to work for Valley Collaborative, Valley Collaborative obtain and may rely on a favorable suitability determination, if the following criteria are met:

- (a) The suitability determination was made within the last seven years; and

- (b) The individual has not resided outside Massachusetts for any period longer than three years since the suitability determination was made; and **either**
- (c) The individual has been employed continuously for one or more school employers or has gaps totaling no more than two years in his or her employment for school employers; or
- (d) If the individual works as a substitute employee, the individual is still deemed suitable for employment by the school employer who made a favorable suitability determination. Upon request of another school employer, the initial school employer shall provide documentation that the individual is still deemed suitable for employment by the initial school employer.

CORI Procedures

In accordance with M.G.L. c. 268, §1, M.G.L. c. 71, §38R, and M.G.L. c. 6, § 172(a)(3), these procedures are applicable to the criminal history screening for current and prospective employees, volunteers, consultants, subcontractors providing services to Collaborative students, all potential employers of students in internships or cooperative education programs, and others who may have direct and unmonitored contact with students and adults with special needs.

Where Criminal Offender Record Information (CORI) and other criminal history checks may be part of a general background check for current and prospective employees, volunteers, consultants, subcontractors providing services to Collaborative students, all potential employers of students in internships or cooperative education programs, and others who may have direct and unmonitored contact with students and adults with special needs, the following practices and procedures will be followed.

I. CONDUCTING CORI SCREENING

CORI checks will only be conducted as authorized by the Department of Criminal Justice information Services (DCJIS) and MGL c. 6, §. 172, and only after a CORI Acknowledgement Form has been completed.

A CORI acknowledgement form shall be completed every two years for checks. Please note, the DCJIS CORI Acknowledgment Form adopted by Valley Collaborative notifies individuals that their CORI may be requested at any time within the one year that the acknowledgment form is valid.

II. ACCESS TO CORI

Valley’s iCORI’s Representatives and Users have received training and therefore have an understanding that all CORI obtained from the DCJIS is confidential, and access to the information will be limited to iCORI Representatives and Users who “need to know”. This may include, but not be limited to, hiring managers, staff submitting the CORI requests, and staff charged with processing job applications. Valley Collaborative must maintain and keep a current list of each authorized iCORI Representative and User who has access to, or is qualified to view, CORI. This list must be updated every six (6) months and is subject to inspection upon request by the DCJIS at any time.

Authorized iCORI Users & Representatives

<u>Name</u>	<u>Role</u>	<u>Username</u>
-------------	-------------	-----------------

Kari Morrin	Representative	kmorrin
Sean Curran	User	scurran
Kathleen Diaz	User	kdiaz

NEED TO KNOW

Chris A. Scott, Executive Director

Joia Mercurio, Deputy Director

Nicole Noska, Principal

Nicholas LeClair, Principal

Heather MacKay, Principal

Matthew Gentile, Director of DDS Services

III. CORI TRAINING

An informed review of a criminal record requires training. Accordingly, all personnel authorized to review or access CORI at Valley Collaborative will review, and will be thoroughly familiar with, the educational and relevant training materials regarding CORI laws and regulations made available by the DCJIS.

Valley Collaborative is an agency required by MGL c. 6, §. 171A, to maintain a CORI Policy, all personnel authorized to conduct criminal history background checks and/or to review CORI will review, and will be thoroughly familiar with Valley Collaborative's CORI Policy and Procedures.

IV. USE OF CORI IN BACKGROUND SCREENING

CORI used for employment purposes shall only be accessed for applicants who are otherwise qualified for the position for which they have applied.

Unless otherwise provided by law, a criminal record will not automatically disqualify an applicant. Rather, determinations of suitability based on background checks will be made consistent with this policy and any applicable law or regulations.

V. VERIFYING A SUBJECT'S IDENTITY

If a criminal record is received from the DCJIS, the information is to be closely compared with the information on the CORI Acknowledgement Form and any other identifying information provided by the applicant to ensure the record belongs to the applicant.

If the information in the CORI record provided does not exactly match the identification information provided by the applicant, a determination is to be made by an individual authorized to make such determinations based on a comparison of the CORI record and documents provided by the applicant.

VI. QUESTIONING A SUBJECT ABOUT HIS/HER CRIMINAL HISTORY

In connection with any decision regarding employment, volunteer opportunities, the subject shall be provided with a copy of the criminal history record, whether obtained from the DCJIS or from any other source, prior to questioning the subject about it. The source(s) of the criminal history record is also to be disclosed to the subject.

VII. DETERMINING SUITABILITY

If a determination is made, based on the information as provided in section V of this policy, that the criminal record belongs to the subject, and the subject does not dispute the record's accuracy, then the determination of suitability for the position will be made. Unless otherwise provided by law, factors considered in determining suitability may include, but are not limited to, the following:

- (a) Relevance of the record to the position sought;
- (b) The nature of the work to be performed;
- (c) Time since the conviction;
- (d) Age of the candidate at the time of the offense;
- (e) Seriousness and specific circumstances of the offense;
- (f) The number of offenses;
- (g) Whether the applicant has pending charges;
- (h) Any relevant evidence of rehabilitation or lack thereof; and
- (i) Any other relevant information, including information submitted by the candidate or requested by the organization.

The applicant is to be notified of the decision and the basis for it in a timely manner.

VIII. ADVERSE DECISIONS BASED ON CORI

If an authorized official is inclined to make an adverse decision based on the results of a criminal history background check, the applicant will be notified in accordance with DCJIS regulations 803 CMR 2.18, 2.19). The subject shall be provided with a copy of the Valley Collaborative's CORI Policy & Procedures and a copy of the criminal history (unless a copy was provided previously). The source(s) of the criminal history will also be revealed. The subject will then be provided with an opportunity to dispute the accuracy of the CORI record. Subjects shall also be provided a copy of DCJIS' *Information Concerning the Process for Correcting a Criminal Record*.

(Appendix X)

(Appendix Y)

IX. SECONDARY DISSEMINATION LOGS

All CORI obtained from the DCJIS is confidential and can only be disseminated as authorized by law and regulation. Valley Collaborative does not disseminate CORI to secondary organizations.

Workman's Compensation

Employees who are injured at work must complete a staff incident report as soon as an injury happens, but no later than 24 hours after the injury (Appendix W).

Principals must submit the staff incident report to the Human Resources Department. HR reviews the information and if:

- There is no lost time nor outside medical intervention involved, the incident report is filed in the employee's ADP electronic personnel file under "Employee Documents".
- If there is lost time and/or outside medical intervention involved, Human Resource representative will initiate a claim with the Workers' Compensation Carrier and then file the Incident Report in the employees ADP electronic personnel file under "Employee Documents".

The Human Resources representative must access Valley Collaborative's A.I.M. Mutual Insurance portal to enter the claim, using the staff incident report at: (<https://www.aimmutual.com/>)

- Upload original incident report as PDF to A.I.M. portal
- Once claim has been filed via the website, Human Resource representative saves a PDF copy of the claim and uploads to ADP employee documents.

An A.I.M. representative is then assigned to the case and the Human Resource Department is notified. Representatives are assigned to injured employees based on the type of claim:

- Claims to cover medical bills only, no missing wages
- Claims to cover medical bills and missing wages
 - If the injured employee is not able to return to work immediately following the incident HR will determine the last day worked and place the individual on a leave of absence until the employee is released by their doctor.
 - Valley Collaborative covers the first 5 work days missed – no benefit time applied.
 - Workman's Compensation begins on the 6th day of missed work and provides the employee with 60% of his/her wages and Valley Collaborative applies sick/personal/vacation time to supplement 40% of the employees pay to keep whole during this time.
 - If an employee is tracking to miss 5 days of work due to injury, inform Executive Director.
 - Human Resource department must fill out A.I.M. FORM 127 (Average Weekly Wage Form)
 - Employee's wage will be calculated as a weekly average based on the previous 52 weeks of pay from the date of injury.

Human Resource Department informs employee of claim number and A.I.M. representative's name and contact information.

Employees out on Workman's Compensation are also advised to fill out FMLA forms.

Employee are advised to provide release to return to work to the Human Resource department before they are allowed to return to work.

Human Resource department will then advise the Principal/managing supervisor as well as A.I.M. when the employee is returned from medical leave, or the return to work date.

GIC's Annual Benefits Enrollment/Open Enrollment

Each April, the GIC's Annual Enrollment period begins and extends for a period of 4 weeks. Each March, the GIC holds a coordinator training session to highlight items that need to be communicated to staff before the Annual Enrollment period. The GIC provides updated Benefit Decision Guides via their website and holds health fairs throughout the state for employees to access.

The Human Resource Department emails all staff regarding the changes to GIC plans, as outlined during the coordinator training session. Then, HR open meetings scheduled in each school in order to meet with staff and collect updated GIC Form 1 paperwork. Each staff's updated Form 1 is then scanned and a copy is uploaded to each employee's electronic personnel file in ADP under 'Employee Documents.' Any elected change is then entered into the 'Payroll Items' tab in the 2019-2020 Employee Status Changes google sheet with the corresponding pay period to ensure changes in deductions are recorded.

The Human Resource Department then sends all changes to the GIC via the USPS within 5 days after the close of the Annual Enrollment period.

The Human Resource Department contacts the ADP Annual Enrollment Specialist assigned to Valley Collaborative to begin the open enrollment updates. The ADP Annual Enrollment Specialist and the Human Resources Department work together to test the enrollment updates and rates to ensure changes in the system are validated before deductions are scheduled to begin.

Annual Contracting

Each March, the Human Resource Department provides a complete staff list to principals/supervisors as well as the Executive Director for each program, and discusses programmatic ratios and the need for continued staffing.

Annual Performance Evaluations: Non-Professional Staff Evaluation & DESE Educator Evaluation

All Valley Collaborative staff are evaluated annually regarding his/her job performance.

Non-professional staff are evaluated using a Valley Collaborative developed evaluation tool with 8 outlined criteria for discussion, along with an open dialogue box for overall comment.

- Principal/Supervisor initiates the evaluation process each spring and completes the evaluation tool.
- Then, Principals/Supervisors and staff conference to review the evaluation, provide commentary as well as feedback, and gather signatures and dates as acknowledgement.

Professionally Licensed Staff are evaluated using the Department of Elementary and Secondary Education (DESE) rubrics to ensure each professional's performance aligns with state standards, indicators, and elements. The DESE Educator Evaluation Process is accessed via an employee's Valley Collaborative Google log-in and lives in Google Drive.

In accordance with DESE's standards regarding the length of each plan:

- Valley Collaborative's One year educator plan is an 11 Step process and the timeline for this process spans one school year (10 months). Staff subject to a one year plan are educators new in

his/her role, educators new to the district, and/or educators who do not possess a professional license.

- ValleyCollaborative's Two year educator plan is a 13 Step process and the timeline for this process spans two school years (22 months). Staff subject to a two year plan are educators who are professionally licensed and who received at least a proficient rating in the previous evaluation cycle.

Each September, Professionally Licensed educators on a one year plan need to begin the process by completing Step 1 via the following link: <https://forms.gle/hJxtRZNkgvK5es9F6>, while professionally licensed staff who are entering the second year of his/her evaluation cycle will be able to continue utilizing the Google workbook from the previous school year in order to access documents.

Appendix Z



Central Administration

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

Disabled Persons Protection Commission Abuser Registry Consent Form

Pursuant to M.G.L. c. 19C, §15, before employing or contracting with a care provider, the Department of Developmental Services (DDS) or any employer who is licensed by, funded by, or contracts with DDS is required to complete a search of the Disabled Persons Protection Commission (DPPC) Abuser Registry. As a prospective or current care provider, I understand that DDS and employers may only search the Abuser Registry with my signed consent. I also understand that DDS or employers cannot hire, utilize the services of, or employ a person who appears on the Abuser Registry or a person who refuses to consent to a search of their name on the Abuser Registry.

I hereby acknowledge and grant permission to DDS or my prospective or current employer to perform a search of my name and other personally identifying information on the Abuser Registry to determine whether I am listed on the Abuser Registry. I understand that the search of the Abuser Registry will be based upon the information exactly as provided below, and as verified by DDS or my prospective or current employer. I further understand that I may be required to provide additional information to DDS or my prospective or current employer to verify a search. Should DDS or my prospective or current employer learn that my name appears on the Abuser Registry, they will inform me that I am listed on the Abuser Registry and provide me with contact information for the DPPC.

By signing below, I provide my consent to a DPPC Abuser Registry search and affirm that the information provided is true and accurate.

Care Provider Information

First Name: _____ Middle Name: _____

Last Name: _____

Date of Birth (MM/DD/YYYY): _____ Last four digits of Social Security Number: _____

I attest that the information above is accurate and complete to the best of my knowledge.

(Care Provider Signature)

(Date)

DDS/Employer Verification

I attest that I reviewed the care provider's identifying documentation and confirmed the care provider's identity.

(Employer Name (print))

(Date)

(Employer Signature)

(Job Title)

Please submit a copy of your valid driver's license or passport as supporting documentation.



Central Administration

11 Executive Park Drive, N. Billerica, MA 01862 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Ph.D., Executive Director
Date: September 12, 2024
Re: Quarterly Reports on Collaborative Business – FY'24 Fourth Quarter

As per 603CMR 50.00: Educational Collaboratives – Education Laws and Regulations and in accordance with the provisions of M.G.L. c. 40, § 4E, please find below Valley Collaborative Quarterly Reports on Collaborative Business:

1. quarterly information and updates to the programs and services provided by the collaborative and any regional collaborative efforts;
 - Please find Valley Collaborative's Summer Newsletter attached
 - Please find Valley Collaborative's Treasurer Reports attached
2. a report on significant changes in programs, services, budgets, and property as they arise;
 - Please find attached the Interim Statement of Revenues, Expenses, and Changes in Net Assets
3. a copy of the collaborative agreement and any amendments;
 - Please find attached the Valley Collaborative's Articles of Agreement Amended and Restated Articles of Agreement (approved on June 13, 2013)
4. a copy of the annual budget and tuition rate;
 - Please find attached the Valley Collaborative academic calendar which includes the Valley Collaborative Board of Director meetings. Please note, Valley Collaborative's proposed FY'26 budget will be presented and discussed at the December 12, 2024 meeting. Also noteworthy, the Board of Directors meeting on January 9, 2025 will be Valley Collaborative's stakeholder meeting.



We are: On a Roll

■ Page 2: The Elementary School is wrapping up a great year, featuring lots of learning and a ton of fun.



We are: Over the moon

■ Page 4: A trip to the McAuliffe-Shepard Discovery Center in Concord, NH was a highlight for the Middle School.



We are: Out and About

■ Page 7: Individuals in Valley's Adult Programs have been enjoying more activities and learning opportunities than ever before.

VALLEY COLLABORATIVE

Volume 12, Issue 4 News for the extended Valley Collaborative community Summer 2024

Celebrating Our Successes, Planning for the Future



LEFT TO RIGHT: MAZYAR MOSHTAGHI, CHIEF TECHNOLOGY OFFICER; PATRICIA SICARD, ACCOUNTS MANAGER; DR. CHRIS A. SCOTT, EXECUTIVE DIRECTOR; RENATO SILVA, SCHOOL SAFETY & FACILITIES MANAGER

Dear members of the Valley Collaborative Community:

As we wind down the 2023 - 2024 school year, we are proud of all that has been accomplished at Valley due to the dedicated work, collaboration and communication of our families, our staff and our administration.

Planning forward is an important ingredient in our recipe for success at Valley. The professional learning opportunities provided this school year came about as a result of our assessments of the needs of everyone at the Collaborative and thoughtful planning to meet those needs. Additionally, we have already started to work on our next Five Year District

Improvement Plan. By applying the concept of collaboration, this process includes gathering input from a wide audience and a variety of sources to create a plan which will improve and enhance all we do in our programs. The plan will be completed within the next few months and will provide us with a basic roadmap for our continuing journey and quest for excellence.

As you may be aware, Valley Collaborative is a special education public entity which bills sending public school districts and other public entities for tuition and services provided to our amazing students and adults.

**continued on back page*

VALLEY COLLABORATIVE

Showing Our Colors at the Elementary School

The Elementary School is wrapping up a truly outstanding year, one filled with activities aimed at helping our students be stronger readers, healthier kids, and better stewards of the environment. There were also plenty of field trips and other fun-filled events—so many that students can't agree on their favorites.

"The holiday gift exchange was my favorite. It was fun to give and shop for people," said fourth grader Madeleine Clark. "My favorite was the Halloween Party and Trunk-or-Treat because I liked to see what other people were wearing," said fourth grader Olivia Lane. Another favorite event of the year was a fall African Drumming performance. "The African Drumming was fun!" said sixth grader Khloe Walsh. Fourth grader Lindsey Lavanga added: "The drumming and dancing were fun. Caroling was awesome too!"

On a Roll

We kicked off the spring half of the school year with a field trip to Roller Kingdom in Tyngsboro. Students had a chance to exercise perseverance as they learned and practiced skating. "Roller Kingdom is the best place on earth!" said third grader Nate Skuse. "Roller Kingdom is fun!" agreed sixth grader Javian Pettengill. And while dancing on skates isn't easy, that's exactly what second grader Lucas Harrington enjoyed, adding, "I like to dance at Roller Kingdom!"

A Month of Love and Kindness

February was a month filled with the spirit of love and kindness at the Elementary School, starting with spirit week from February 12th-16th: Love & Kindness Spirit Week, a "caught-being-kind" incentive program, and numerous kind-

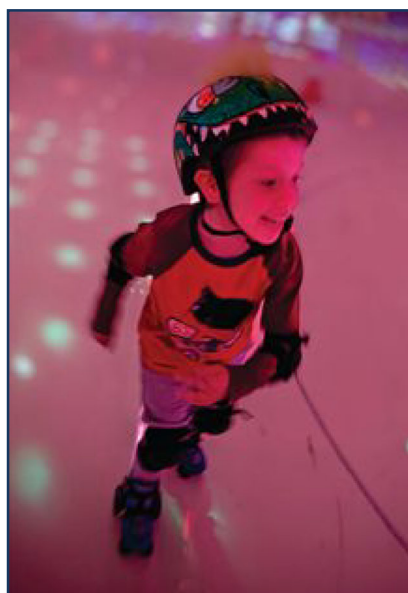


ness themed activities. A Valentine's Day celebration featured a dance, a photo booth, and crafts. Finally, we wrapped up the month with a special assembly on February 28th at which students learned about the life, work, and lasting influence of Doctor Martin Luther King Jr.

Read Across America

Students celebrated this annual tribute to all things literacy with a reading themed spirit week, buddy-reading, as well as visits from guest readers.

TOP: ELEMENTARY SCHOOL STAFF SHOW THEIR COLORS IN THE AUTISM AWARENESS "RAINBOW OF COLOR" THEMED WALK; BELOW SECOND GRADER ETHAN BARRY ON A VISIT TO ROLLER KINGDOM.



Hands-on Science

The Acton Discovery Center Traveling Science Program returned in March to lead hands-on "Force & Magnetism" science workshops. April featured a visit from Eyes on Owls, teaching our students about these fascinating creatures.

Autism Awareness

To celebrate Autism Awareness Month, we held a spirit week in early April, featuring themed spirit days, art projects, and other activities that focus on Autism Awareness. To cap off the spirit week, we held our annual Autism Awareness Walk on Friday, April 12th. This year we showed our support of the spectrum with a "rainbow of color" themed walk and activities.

Earth Days

We celebrated Earth Day on April 22 with earth and environment themed activities. On May 10, percussion ensemble Bash The Trash returned to Valley for a performance that combined music, science and creativity.

Mental Health Awareness

May is Mental Health Awareness Month, and we marked the occasion with a coping skills spirit week. We celebrated our current coping skills, and explored new skills that encourage self-care and emotional regulation.

Still ahead: our annual field day, graduation, and graduate talent show, capping off the year in June! ■

VALLEY COLLABORATIVE

Top Honors to an Outstanding Staff Member

When Eli Goumbakis was recognized as the top Division 1 assistant football coach in Massachusetts, Nick LeClair, principal of the Alternative Programs at the Transitional High School where Eli works, says he wasn't surprised at all. "Eli to his core is a coach on and off the field," says Nick. "He brings the best out of our kids."

Eli, whose official title at Valley is Consumer Science Vocational Coordinator, was recognized by the Massachusetts High School Football Coaches Association (MHSFCA) for his coaching success at Westford Academy. The head coach at Westford, Bruce Rich, nominated Eli in recognition of his hard work over the past three years, during which the football team, known as the Grey Ghosts, has emerged as a powerhouse, including winning the league last year.

For Eli, who has been coaching across a variety of sports for nearly twenty years, the award was a validation of his work with kids, whether on a high school team or at Valley. "The work I do here at Valley is all

about building relationships with the kids," says Eli. "That's how coaching works too. If kids believe in you they'll respond well. Then the possibilities are endless."

Eli dates the start of his coaching career to his college days when an injury kept him off of the football field. Eager to remain part of the football community, Eli took a coaching job at Chelmsford High when he was just 22. Over the years, he has coached multiple sports, including rugby and lacrosse, at a variety of schools. In addition to twelve years at Chelmsford High, Eli also spent four years at Groton-Dunstable High School before moving to Westford Academy.

On the football field, Eli is known for intense pre-game speeches that inspire and motivate his players. He brings that same spirit to his work with students at Valley. Whether the setting is a football game in front of a sell-out crowd of 5,000 or the local gym that is home to Valley's brand new Jiu

Jitsu Club, says Eli. "How do we motivate each individual? How do we feed the fire?"

While Eli says that while his decades of coaching has influenced his work at the Transitional High School,



ELI GOUMBAKIS, CONSUMER SCIENCE VOCATIONAL COORDINATOR AT THE TRANSITIONAL HIGH SCHOOL, HAS BEEN NAMED DIVISION 1 ASSISTANT FOOTBALL COACH OF THE YEAR.

five years working at Valley have also made him a better coach. "At Valley, we're super focused on each individual kid," says Eli, whose job includes setting up internships for students based on their interests. "You need to get to know them and how they're motivated, and then adjust accordingly."

When Eli accepted the coaching honor at an MHSFCA banquet in early May he was quick to turn the attention to the various 'teammates' who've assisted him over the years. "I've been fortunate to have had some incredible mentors," he says. On the list: coach Bruce Rich Sr. who gave him his first coaching job at Chelmsford High School, as well as coaches Jason Fletcher and Tom Caito. He also gave thanks to his personal 'team,' namely his parents, and especially his wife and son. "They've had to miss a lot of family time in order for me to get here today." ■



ELI GIVING ENCOURAGEMENT TO MEMBERS OF THE WESTFORD ACADEMY FOOTBALL TEAM.

VALLEY COLLABORATIVE

At Valley Middle School, a Year to Remember

The 2023-2024 school year in the Alternative Program of the Middle School was one to remember! Students worked extremely hard in their core classes engaging in various writing, reading and hands-on activities. In ELA, the students read *Camp Sunshine* by local author, Jarret J. Krosocza, and *Thank You, Ma'am* by Langston Hughes, then showed off their writing skills by completing an essay for each book. In science, students created rockets, plant and animal cells out of candy, and root beer floats to understand the states of matter. In history, students participated in a biography project that required them to research a famous person and create a visual representation of their work. In math, students utilized manipulatives to increase their skills and researched travel expenses for a dream vacation.

When core classes weren't in session, students enjoyed electives such as Football Club (with a special trip to



SPECIAL EDUCATION ASSISTANT ZACH GRUNDY AND STUDENTS ZACHARY HAMMOUMI AND LOGAN COUGHLIN ENJOY A SCHOOL EVENT.

Patriots Hall of Fame), Culinary Arts, and Dungeons and Dragons Club. Learning skills outside of the classroom in the community setting plays a large role in programming, and student incentive trips to Altitude, Franklin Park Zoo, Bolton Animal Adventures, Metro Rock, and Honey-pot Hill Orchards were among some of the favorite attractions.

The Transitional Program of the Middle School also enjoyed activities outside of the classroom this year. Among the favorites were the Pirate Museum in Salem, MA, Enchanted Village, rock climbing at Metro Rock, and hiking Mt. Watatik. In culinary arts, students loved cooking food from different countries each month. Students had a blast showcasing their talents at the school talent show and their athleticism at the Special Olympics.

Students in the Valley Middle School, transitional and alternative programming, shared many similar sentiments of what made their year

at Valley outstanding. Many students credited the staff and programming to their success, as well as the sensory spaces, behavioral support, and accommodations. Middle School staff credit a successful year to the students and all of their accomplishments and growth. Here's what students and staff had to say when asked, "What made it an outstanding year for you at Valley?"

Ryder Raines, student, Transitional Middle School: "All the staff being supportive and patient."

Jude Galbraith, student, Transitional Middle School: "It's been helpful having the staff and resources that I need."

Kayden Bovardi, student, Transitional Middle School: "Being able to take sensory breaks."

*continued on page 6



TRANSITIONAL MIDDLE SCHOOL STUDENT KAYDEN BOVARDI WITH HIS GINGERBREAD HOUSE.

VALLEY COLLABORATIVE

An Outstanding Year at Valley Transitional High School

The Transitional High Schoolers continued to gain valuable academic, vocational, and functional living skills in preparation for adulthood during this school year. With a steady mix of community-based, real-world experiences, they've also had lots of fun! In December, students in the transitional programs dressed to impress for the annual trip to the North Shore Music Theater to see a production of A Christmas Carol. Other favorite field trips this year included the Museum of Science, the Madagascar play, Stone Zoo, Fenway Park, and the Patriots Hall of Fame. An epic time was also had by the students who hiked Mt. Monadnock to watch the solar eclipse. Students had fun celebrating each of the seasons with friends at the Halloween, Holiday, and Winter dances.

The school store is a favorite memory of many in the Transitional High School. Students enjoyed cashing in their Dojo points for everything from Pokemon cards to headphones and fidgets. A favorite item was a

new gumball machine that lets students win a variety of prizes, including a chance to pick a prize from the treasure chest.

The destination for this year's school trip was Chicago, Illinois where the Valley Travelers enjoyed all the sights and sounds Chicago has to offer including Michigan Avenue's Magnificent Mile, Millennium Park, Wrigley Field, and Lincoln Park Zoo. The Valley travelers watched a Chicago Cubs game, took the Seadog River and Lake Architecture Cruise, and participated in a deep dish pizza making class.

Graduation and end of year preparations are in full swing at the Valley Transitional High School. During a recent student council meeting the room was buzzing with ideas for the upcoming prom.



TRANSITIONAL HIGH SCHOOL STUDENTS JADEN QUINONES, GAVIN WARGO, AIDEN MITCHELL, COREY ERICKSON ON THE JOB AT CHELMSFORD DPW

*continued on page 6

TRANSITIONAL HIGH SCHOOL STUDENTS ELLIOT URBAN, MICHAEL MCANDREWS, AND RILEY LADUKE WITH ADVISORS DURING A STUDENT COUNCIL MEETING.



VALLEY COLLABORATIVE

At Valley Transitional High School, an Outstanding Year

**continued from page 5*

Students ultimately voted on an 80's theme to close out a successful school year.

This year was a year of learning, fun, and making lots of memories with friends.

We asked students and staff to reflect on this past year. Work sites tailored to individual student interests, academic successes, and extra-curricular activities are just a few of the responses. Here's what students and staff had to say when asked, "What made it an outstanding year for you at Valley?"

Vanessa Sebastian, student: "Going to work. I started two new jobs this year at the Service Dog Project and the Guinea Pig Sanctuary."

Anthony Normand, student: "Meeting new people and taking field trips."

Aiden Russell, student: "Starting a new job in the bistro."

Nicholas Porcaro, student: "Passing my final MCAS."

Michael McAndrews, student: "Being involved in school leadership, helping everyone, motivating students."

Riley LaDuke, student: "I've been here since I was 13, it's all about gaining experience so you can learn, grow, thrive, and adapt."

Lori Escolas, teacher: "I get to work with an amazing staff and administration. These students never cease to amaze me with their resilience, perseverance, and ability to overcome challenges. I am very proud of all of their accomplishments, and it will be bittersweet to watch some of them graduate. This was a fantastic year, I am so lucky to work at the Collaborative."

Mitchell Doherty, special education assistant: "Seeing the progress of the students who I work with along with the connections I've made with the Valley team." ■

A Year to Remember



TEACHER HANNAH MORIARTY LEADS THE ALTERNATIVE MIDDLE SCHOOL STUDENTS IN A HOLIDAY CELEBRATION.

**continued from page 4*

Andres Diaz, student, Transitional Middle School: "The staff. They help me be a better person."

Hailey Hamilton, student, Alternative Middle School: "The staff and all the available resources and earning Dojo points to buy things from the school store."

Hannah Moriarty, Teacher, Alternative Middle School: "It's been super rewarding to see the gains the students have made in ELA, specifically with writing and their willingness to engage with reading."

Zach Grundy, Special Education Assistant, Transitional Middle School: "Seeing how our students have come over the year, both academically and in terms of their maturity."

Jaclyn Squeglia, M.Ed, SAC, LMHC: "Seeing our transitional support staff reach their goals and become Special Education teachers. It inspires me to watch them grow into mature, professional educators who love our students and love coming to work each and every day." ■

Special thanks to the generous donors who support our Student/Adult Services Activity Fund:

\$5,000.00 – Enterprise Bank and Trust, Mr. George Duncan Chairman
 \$1,000.00 – Allan Blume
 \$300.00 – Barrow Weatherhead Lent LLP
 \$250.00 – Fritz Deguglielmo, LLC
 \$100.00 – Anthony J. Bent
 \$100.00 – Autumns Hill Orchard
 \$100.00 – J.P. O'Connor Hardware Inc

In Kind Donations:

Mel's Funway Park LLC – \$25.00 Gift Cards (2)
 Market Basket – \$25.00 Gift Cards (2)

VALLEY COLLABORATIVE

Adult Services: More Space and a Big Year

This year has been a big one for the Adult Services program as we've settled into our larger space. More space has enabled us to offer improved and expanded learning opportunities to the adults in the Today and Tomorrow program. The space, which we share with Mass Rehab, is located right off the highway, which means less time on the road for individuals, whether they're headed from home or to the job site. What do our individuals have to say about the past year?

Mike Koczan – “I like working at BMS all year and doing the packages and mail. I like being able to see and talk to all the other staff that work at BMS. It makes me happy and it's one of my favorite job sites that I go to. I also love going to the Food Bank in Lowell and helping to deliver meals to people that need them.”

Billy Haberlin – “I really like working with all the job coaches here and all the new job coaches. When I need help they are there for me and they help me with the work tasks that we have and they help keep me on track. I like that I get to be out in the

community every day and go to all the different sites.”

Melaina Chaput – “I work independently at TJ Maxx three days a week and I've been there for almost 18 years. I like how my Job Developers come and check in with me to make sure I have everything I need and to help me if I'm having any issues at work. I've also had a great year being with all my friends and getting to try different activities with CBDS like going to the Tyngsboro Sports Center and helping with our community gardening.”

Crystal Dwyer – “I like all my friends and getting to see them every day. We have so much fun together everyday with all the different activities we do. I also work at Wegmans three days a week on my own. Job Developers come to check on me every week and help me and make sure everything is going good for me. I've been at Wegmans for nine years!”

Scott Noftle – “I really like working at 3M and Chelmsford High School. I really enjoy that I get to see everyone when I come to the program. I've made some good connections with other people in the program and now I can always talk to them even when I'm not at Valley. I also really like Career Planning and talking about all the different job sites I could work at one day.”

Jacob Bettencourt – “I really enjoyed all the stuff we do. I like going to different parks and seeing different parts of the community. I really like getting to work and earn money too. My favorite work site is the Chelmsford High School Kitchen and I also really like volunteering with Meals on Wheels.”



TOP: BILLY MCCLURE GREETES PEOPLE AT OUR FRONT DESK; BELOW: SHARIFAH NAMIGADDE AND JOE SEPE AT A LOCAL MUSEUM ON A CBDS FIELD TRIP.

Billy McClure – I like this building. I like being in our new building because it's fun. There is a lot of space! I love my jobs. I like working at CrossPoint and talking with all the different people that work there. I like Community Catering and serving people meals. People need food so I like to be able to help them and give them food.”

Sharifah Namigadde – “I enjoy going to work, I enjoy working with all my friends. I always feel happy when the job coaches are nice to me and we get to talk to each other about the things going on in our life. I get to work independently sometimes and I really like that. I've come a long way and I am becoming a better and better worker with all my opportunities. I like how many choices I get every day and getting to choose where I want to go.” ■



Valley Collaborative Leadership Team



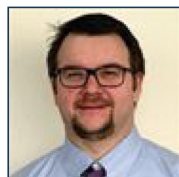
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Finance and Operations
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Joia Mercurio

Deputy Director
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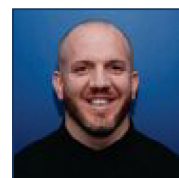
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Jessica Scalzi

Lead Nurse
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Valley Collaborative Board

Chair: Dr. Jay Lang

Superintendent, Chelmsford Public Schools

Dr. Kerry Clery

Superintendent, Billerica 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

Superintendent, Tewksbury Public Schools

Dr. Michael Flanagan

Superintendent, Tyngsborough Public Schools

Dr. Christopher Chew

Superintendent, Westford Public Schools

Celebrating Our Success, Planning for the Future

»continued from cover

This financial structure is far different than a typical public school district which receives monies from the state based on enrollment. As such, the competent fiscal management of Valley is crucial for us to be able to continue to provide state-of-the-art programming to the individuals we serve.

The Department of Elementary and Secondary Education (DESE) is in the process of creating and implementing financial protocols for review of educational collaboratives across the Commonwealth. Given Valley's strong financial position and

its robust compliance with state laws and regulations, Valley was asked to provide feedback to the State on the draft financial protocols and has also been chosen to be the beta test site for this financial review. Valley is proud of its role in helping DESE to finalize these protocols of best practice as they will enhance the financial operations of Collaboratives statewide.

I thank each of you for the contributions you have made to such a wonderful school year of achievement and joy in learning, both in our programs and at home. It takes a village and our Valley village is strong!

As you can see, we are looking forward with anticipation to an even better year ahead. With a year of great accomplishment coming to a close, we feel we have only just begun. Have a wonderful summer!

My door is always open,

Chris A. Scott,
Executive Director

**VALLEY COLLABORATIVE
TREASURER'S REPORT
MAY 31, 2024**

		<u>Beginning Balance</u>	<u>Receipts</u>	<u>Payroll</u>	<u>Accounts Payable</u>	<u>Earnings</u>	<u>Transfers</u>	<u>Ending Balance</u>
ENTERPRISE BANK ACCOUNTS								
Operating	a/c 493426	\$ 3,700,715.20	\$ 2,490,559.57		\$ (175,465.42)		\$ (1,894,900.00)	\$ 4,120,909.35
Payroll	a/c 795823	\$ 515,150.45		\$ (2,264,583.03)			\$ 1,900,000.00	\$ 150,567.42
Joe's Bistro	a/c 531401	\$ 5,745.91	\$ 2,028.92				\$ (5,100.00)	\$ 2,674.83
ICS MMDA	a/c 856490	\$ 4,751.13				\$ 2.01		\$ 4,753.14
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	<u>\$ 114.36</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 114.36</u>
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 5,726,477.05</u>	<u>\$ 2,492,588.49</u>	<u>\$ (2,264,583.03)</u>	<u>\$ (175,465.42)</u>	<u>\$ 2.01</u>	<u>\$ -</u>	<u>\$ 5,779,019.10</u>
MMDT	a/c 0044263747	<u>\$ 1,092,439.09</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 5,101.05</u>	<u>\$ -</u>	<u>\$ 1,097,540.14</u>
Total Unrestricted Cash		<u>\$ 6,818,916.14</u>	<u>\$ 2,492,588.49</u>	<u>\$ (2,264,583.03)</u>	<u>\$ (175,465.42)</u>	<u>\$ 5,103.06</u>	<u>\$ -</u>	<u>\$ 6,876,559.24</u>
PARS OPEB Trust		<u>\$ 7,045,309.31</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (2,220.74)</u>	<u>\$ 239,189.37</u>	<u>\$ -</u>	<u>\$ 7,282,277.94</u>
TOTAL CASH		<u>\$ 13,864,225.45</u>	<u>\$ 2,492,588.49</u>	<u>\$ (2,264,583.03)</u>	<u>\$ (177,686.16)</u>	<u>\$ 244,292.43</u>	<u>\$ -</u>	<u>\$ 14,158,837.18</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JUNE 30, 2024**

		<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	\$ 4,120,909.35	\$ 2,792,681.83		\$ (398,070.19)		\$ (1,450,000.00)	\$ 5,065,520.99
Payroll	a/c 795823	\$ 150,567.42		\$ (1,300,407.85)			\$ 1,450,000.00	\$ 300,159.57
Joe's Bistro	a/c 531401	\$ 2,674.83	\$ 1,507.93					\$ 4,182.76
ICS MMDA	a/c 856490	\$ 4,753.14				\$ 1.95		\$ 4,755.09
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	<u>\$ 114.36</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 114.36</u>
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 5,779,019.10</u>	<u>\$ 2,794,189.76</u>	<u>\$ (1,300,407.85)</u>	<u>\$ (398,070.19)</u>	<u>\$ 1.95</u>	<u>\$ -</u>	<u>\$ 6,874,732.77</u>
 MMDT	 a/c 0044263747	 \$ 1,097,540.14	 \$ -	 \$ -	 \$ -	 \$ 4,956.17	 \$ -	 \$ 1,102,496.31
 Total Unrestricted Cash		 <u>\$ 6,876,559.24</u>	 <u>\$ 2,794,189.76</u>	 <u>\$ (1,300,407.85)</u>	 <u>\$ (398,070.19)</u>	 <u>\$ 4,958.12</u>	 <u>\$ -</u>	 <u>\$ 7,977,229.08</u>
 PARS OPEB Trust		 <u>\$ 7,282,277.94</u>	 <u>\$ -</u>	 <u>\$ -</u>	 <u>\$ (1,973.11)</u>	 <u>\$ 93,977.67</u>	 <u>\$ -</u>	 <u>\$ 7,374,282.50</u>
 TOTAL CASH		 <u>\$ 14,158,837.18</u>	 <u>\$ 2,794,189.76</u>	 <u>\$ (1,300,407.85)</u>	 <u>\$ (400,043.30)</u>	 <u>\$ 98,935.79</u>	 <u>\$ -</u>	 <u>\$ 15,351,511.58</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JULY 31, 2024**

		<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	\$ 5,065,520.99	\$ 3,112,166.78		\$ (544,736.34)		\$ (2,325,000.00)	\$ 5,307,951.43
Payroll	a/c 795823	\$ 300,159.57		\$ (1,456,787.73)			\$ 2,325,000.00	\$ 1,168,371.84
Joe's Bistro	a/c 531401	\$ 4,182.76	\$ 1,275.94					\$ 5,458.70
ICS MMDA	a/c 856490	\$ 4,755.09				\$ 2.01		\$ 4,757.10
Capital Reserve	a/c 4063467	\$ 1,500,000.00						\$ 1,500,000.00
Independence Project	a/c 821315	<u>\$ 114.36</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 114.36</u>
TOTAL ENTERPRISE BANK ACCOUNTS		<u>\$ 6,874,732.77</u>	<u>\$ 3,113,442.72</u>	<u>\$ (1,456,787.73)</u>	<u>\$ (544,736.34)</u>	<u>\$ 2.01</u>	<u>\$ -</u>	<u>\$ 7,986,653.43</u>
MMDT	a/c 0044263747	<u>\$ 1,102,496.31</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 5,145.19</u>	<u>\$ -</u>	<u>\$ 1,107,641.50</u>
Total Unrestricted Cash		<u>\$ 7,977,229.08</u>	<u>\$ 3,113,442.72</u>	<u>\$ (1,456,787.73)</u>	<u>\$ (544,736.34)</u>	<u>\$ 5,147.20</u>	<u>\$ -</u>	<u>\$ 9,094,294.93</u>
PARS OPEB Trust		<u>\$ 7,374,282.50</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (1,995.10)</u>	<u>\$ 179,154.61</u>	<u>\$ -</u>	<u>\$ 7,551,442.01</u>
TOTAL CASH		<u>\$ 15,351,511.58</u>	<u>\$ 3,113,442.72</u>	<u>\$ (1,456,787.73)</u>	<u>\$ (546,731.44)</u>	<u>\$ 184,301.81</u>	<u>\$ -</u>	<u>\$ 16,645,736.94</u>

Valley Collaborative
Interim Statement of Revenues, Expenses and Changes in Net Assets
For the Period Ending June 30, 2024
210 of 210 (100%) School Days

UNAUDITED		
	AMENDED BUDGET	ACTUAL
REVENUES		
Services	\$ 19,600,000	\$ 20,646,468
State Contracts	4,500,000	4,590,023
Other	700,000	663,525
Interest	5,000	59,537
Total Revenues	24,805,000	25,959,553 104.65%
EXPENSES		
Salaries	16,431,226	16,717,809
Employee Benefits	2,935,498	2,797,607
Operating Expenses	2,364,910	2,972,265
Leases & Rentals	593,247	657,562
Depreciation	751,000	796,384
Total Expenses	23,075,881	23,941,627 103.8%
Change in Net Assets - Operating	\$ 1,729,119	\$ 2,017,926
Non Operating Activities		
Return to Member Districts	-	-
Non-Operating Expenses (1)	(1,015,000)	
Change in Net Assets	\$ 714,119	\$ 2,017,926

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

VALLEY COLLABORATIVE
Amended and Restated Articles of Agreement



Approved by the Board of Directors of the
Valley Collaborative (MSEC) on June 13,
2013

TABLE OF CONTENTS

	Page
PREAMBLE	1
ARTICLE I Membership	1
ARTICLE II Mission, Objectives, Focus, and Purpose	2
ARTICLE III Programs and Services Offered	3
ARTICLE IV Governance and Powers and Duties of the Board	3
ARTICLE V Responsibilities of Individual Board Members	9
ARTICLE VI Indemnification	11
ARTICLE VII Finance	12
ARTICLE VIII Procedure for Termination of the Collaborative	17
ARTICLE IX Procedure for Withdrawal of Member Districts	18
ARTICLE X Procedure for Admitting New Member Districts	20
ARTICLE XI Procedure for Amending this Collaborative Agreement	21
ARTICLE XII Non-Discrimination	22
APPROVAL BY THE MEMBER DISTRICT SCHOOL COMMITTEES	23

PREAMBLE

This agreement constitutes the amended and restated Articles of Agreement (the “Collaborative Agreement”) of the Valley Collaborative (the “Collaborative”) which is established and exists pursuant to Massachusetts General Laws, Chapter 40, Section 4E, as amended from time to time, and 603 CMR 50.00. This Collaborative Agreement and any subsequent amendments hereto, shall not take effect until approved by the school committees of the Collaborative’s member districts and the Massachusetts Board of Elementary and Secondary Education, upon recommendation by the Commissioner of the Department of Elementary and Secondary Education (“DESE”). This Collaborative Agreement amends and restates the Collaborative Articles of Agreement dated July 1, 2007 entered into by the certain school committees listed in Article I (the “member districts”).

ARTICLE I

Membership

The membership of the Collaborative, as of the effective date of this Collaborative Agreement, includes the school committees from the following member districts, as memorialized by the signatures of the chairs of the school committees:

- School Committee for Billerica Public Schools
- School Committee for Chelmsford Public Schools
- School Committee for Dracut Public Schools
- School Committee for Groton-Dunstable Regional School District
- School Committee for Nashoba Valley Technical School
- School Committee for North Middlesex Regional School District
- School Committee for Tewksbury Public Schools

- School Committee for Tyngsborough Public Schools
- School Committee for Westford Public Schools

ARTICLE II

Mission, Objectives, Focus, and Purpose

The mission of the Collaborative is to conduct educational programs and/or services for member districts in a cost-effective manner and to increase educational opportunities and to improve educational outcomes for its students. The purpose of the Collaborative is to provide high quality intensive educational, therapeutic and transitional programs and related services to individuals with disabilities referred by member districts, non-member districts and social service agencies, including both children and adults, and to provide professional development to educators. The focus of the Collaborative is the provision of special education, transitional, occupational, and therapeutic programs and services in the least restrictive environment and comprehensive professional development within the local communities of the member districts. The overall objectives of the Collaborative include improving the academic achievement and/or occupational skills of students and individuals with disabilities in the least restrictive environment through high quality programs and services; offering a variety of high quality professional development opportunities to general and special education teachers and related service providers; and offering its programs and services in a cost-effective manner.

ARTICLE III

Programs and Services Offered

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

- Day school placements and other programs and services, including educational, therapeutic, transitional, and occupational programs and services for students and individuals with disabilities.
- Professional development programs for general and special educators.
- Other appropriate services and programs as may be established and approved by the Board of Directors of the Collaborative, as permitted by Massachusetts General Laws Chapter 40, Section 4E.

ARTICLE IV

Governance and Powers and Duties of the Board of Directors

1. The Board of Directors of the Collaborative (the “Board”) shall consist of one representative from each member district. Each member district shall annually appoint either a member of its school committee or its superintendent of schools as its appointed representative on the Board. Each Board Member shall have one (1) vote with respect to matters before the Board. No such appointed Board Member may serve on the board of directors or as an officer or employee of a related for-profit or non-profit organization. No Board Member shall receive an additional salary or stipend for his or her service to the Collaborative. The Board also shall consist of an appointee by the DESE Commissioner, who shall serve as a voting Board Member and who shall be entitled to one (1) vote with respect to matters before the Board. No employee of the Collaborative may serve as a Board Member, and no Board Member shall be eligible to serve concurrently as the Executive Director or Treasurer of the Collaborative, or the

Collaborative's business manager or employee with responsibilities similar to those of a town accountant.

2. The Board shall be responsible for providing fiduciary and management oversight and accountability over the operation and management of the Collaborative. The Board shall have all the powers and duties conferred and imposed upon educational collaborative boards by law, including without limitation those powers and duties conferred and imposed upon the Collaborative and the Board by this Collaborative Agreement, Massachusetts General Laws Chapter 40, Section 4E, 603 CMR 50.00, and all acts and regulations amendatory thereof. The Board is responsible for the establishment and maintenance of policies and procedures to support the effective and economical operation of the Collaborative and to oversee the operation of the Collaborative to the end that the educational needs of the students enrolled in its programs are met in a cost-effective way. In addition to other requirements of law, at a minimum, the Board shall develop and maintain policies relative to personnel, students, finance and internal controls, and health and nursing. The policies and procedures formulated or adopted by the Board shall comply with the pertinent policies and guidelines of the DESE, as amended. The Board shall review the effectiveness of its policies and procedures from time to time to ensure currency and appropriateness. The Board shall also establish a process to provide to member district school committees, students, parents, guardians, and the general public all information required by law and regulation.

3. The Collaborative, acting by and through the Board, may adopt by-laws consistent with law and with this Collaborative Agreement to govern the day to day operation or other appropriate matters of the Collaborative. If a particular matter is not covered by such a

document, if any, then any such matter will be handled as the Board deems appropriate by a majority vote of the Board Members unless otherwise provided in this Collaborative Agreement.

4. The Board shall meet no less than six (6) times during each school year, and shall conduct all such additional meetings as are appropriate to carry out the purpose and objectives of the Collaborative. Prior to the commencement of any school year, the Board shall post its regularly scheduled meetings for such school year on the Collaborative's website. Special or emergency meetings may be held upon request, which shall be called by the Board's Chairperson. Public notice shall be given of the date, time, and location of all Board meetings, accurate records of every Board meeting shall be kept, and all meetings of the Board shall be held in compliance with the Massachusetts Open Meeting Law.

5. A quorum of the Board shall consist of a majority of the voting Board Members, and the Board may act by a simple majority vote of the Board Members present unless otherwise provided in this Collaborative Agreement. The vote of each Board Member shall have equal weight.

6. The Board shall, annually during the final meeting of the school year, organize itself by electing a Chairperson and any other Board positions deemed appropriate by the Board. The Chairperson, with the majority vote of the Board, may appoint such committees and subcommittees of the Board as will facilitate its duties and responsibilities.

7. The Board shall hire or appoint an Executive Director, to serve under its general direction, to manage and supervise the Collaborative, oversee the day to day operation of its programs and services, and implement the policies of the Board. The Executive Director shall have the authority granted by Massachusetts General Laws Chapter 40, Section 4E. The Board shall annually evaluate the Executive Director's effectiveness in implementing the programs,

policies, and goals of the Collaborative. The Executive Director shall not serve concurrently (i) as a Board Member or the Treasurer of the Collaborative, (ii) as the Collaborative's business manager or employee with responsibilities similar to those of a town accountant, or (iii) as a board member, officer, or employee of any related for-profit or non-profit organization.

8. The Board shall hire or appoint a business manager or employee with responsibilities similar to those of a town accountant who shall be subject to Massachusetts General Laws Chapter 41, Section 52. The business manager or employee with responsibilities similar to those of a town accountant may not serve concurrently as a Board Member, the Treasurer, or the Executive Director of the Collaborative. The Board shall annually evaluate the performance and effectiveness of its business manager or employee with responsibilities similar to those of a town accountant.

9. The Board shall hire or appoint a Treasurer. The Treasurer shall be responsible for the oversight and certification of all receipts and disbursements related to the Collaborative's funds, and shall perform such duties as are required by the Board and authorized by Massachusetts General Laws Chapter 40, Section 4E and its regulations, and any amendments thereof. The Treasurer shall not serve concurrently as a Board Member, the Executive Director, or the Collaborative's business manager or employee with responsibilities similar to those of a town accountant. The Treasurer shall be compensated in such amount as to be set from time to time by the Board. The Treasurer shall give bond annually for the faithful performance of his or her duties in a form and amount approved by the Commonwealth of Massachusetts Department of Revenue and the Board. The Board may hire or appoint a treasurer of a member district city, town or regional school district to serve as its Treasurer. The Board shall annually evaluate the Treasurer's performance and effectiveness.

10. The Board shall hire or appoint one or more registered nurse(s) as a school nurse and shall provide such nurses with the proper facilities to ensure that the health needs of the Collaborative students are met.

11. The Collaborative shall be considered a government entity and public employer and the Collaborative, by and through its Board of Directors, may employ or appoint such other qualified personnel as may be required to fulfill its duties and responsibilities and the Collaborative's mission, purpose, and objectives, subject to the requirements of Massachusetts General Laws Chapter 40, Section 4E and its regulations, and any amendments thereof. Collaborative employees shall be considered public employees subject to all applicable laws, including without limitation Massachusetts General Laws, Chapter 268A.

12. The Board shall ensure that an annual report is prepared for each fiscal year, which shall, upon approval of such report by the Board, and no later than January 1, be submitted to the DESE Commissioner and the chair of the school committee of each member district. The Collaborative's annual report shall be made available to the public on the Collaborative's website and in hard copy to the public upon a request consistent with the Massachusetts Public Records Law.

13. The Board shall ensure that annual financial statements are prepared, including (a) a statement of net assets; (b) a statement of activities; (c) a governmental funds balance sheet; (d) a governmental funds statement of revenues, expenditures, and changes in fund balance; (e) a general fund statement of revenues, expenditures and changes in fund balance; (f) a statement of fiduciary net assets; (g) a statement of changes in fiduciary fund net assets; and (h) a capital plan identifying current capital obligations or future planned capital projects.

14. The Board shall ensure that an independent audit of the Collaborative is completed annually in accordance with 603 CMR 50.08, and upon approval by the Board, and no later than January 1, submit the audit report for the preceding fiscal year to the chair of the school committee of each member district, the DESE Commissioner, and the Massachusetts Office of the State Auditor.

15. The Board shall ensure that the Collaborative adopts and maintains a financial accounting system, in accordance with generally accepted accounting principles as prescribed by the governmental accounting standards board and any supplemental requirements prescribed jointly by the DESE Commissioner and the Commissioner of Revenue. The Collaborative's financial accounting system shall delineate, at a minimum: (a) administration and overhead; (b) rental of real property; (c) program costs; (d) capital expenditures, including fixed assets, real property or the improvement of real property; (e) debt payments; (f) deposits into a capital reserve; and (g) all additional disclosures required in 630 CMR 50.08(2).

16. The Collaborative, acting by and through the Board, may, subject to Massachusetts General Laws, Chapter 30B, enter into contracts for the purchase of supplies, materials, and services and for the purchase or leasing of land, buildings, and equipment as deemed appropriate by the Board.

17. The Board shall ensure that the Collaborative establishes and maintains a website, which shall include, among other things: (a) a list of the appointed representatives on the Board; (b) copies of the approved and released minutes of the open meetings held by the Board; (c) a copy of this Collaborative Agreement and any amendments; (d) a copy of its annual report and independent audit report; and (e) contact information for key Collaborative personnel.

ARTICLE V

Responsibilities of Individual Board Members

1. Each member district shall annually appoint either a member of its school committee or its superintendent of schools to be its appointed representative on the Board. Prior to the first regularly scheduled Collaborative Board meeting of the school year, each member district shall deliver to the Collaborative an executed appointment letter confirming the identity of its appointed representative and the date(s) of such appointment.

2. Each Board Member shall attend and complete training required by the DESE, as set forth in Massachusetts General Laws, Chapter 40, Section 4E and 603 CMR 50.05. Should a Board Member fail to complete the required training within the timelines set by law and regulations, the Board Member shall automatically become an inactive Board Member, shall not count towards a quorum, and shall not have voting rights on the Board, but shall continue to have all other rights and obligations of membership. The Board Member shall become an active member and voting rights shall be reinstated once the appointed representative completes the required training and provides certificates of proof thereof. A Board Member may meet one or more of the training requirements through an alternative means by providing a description of the training and a certification of completion, which upon determination by the DESE, may satisfy certain training requirements.

3. Each Board Member shall be an active and engaged voting Board Member. All Board Members shall attend scheduled meetings and fulfill all duties required of the Board by law and this Collaborative Agreement. Each Board Member is expected to attend every Board meeting. When a Board Member has missed one-half (1/2) of the Board meetings within a fiscal year, the Chairperson of the Board shall inform the chair of the Board Member's appointing

member district of the absences. A Board Member who misses more than two-thirds (2/3) of the Board meetings within a fiscal year will no longer be considered an appointed representative Board Member, in which case, the Board will notify the respective school committee that the seat will remain vacant until such time as the member district, by appropriate vote, appoints a new representative Board Member. When a Board seat becomes vacant, the member district shall automatically become an inactive member of the Board, shall not count towards a quorum, and shall not have voting rights on the Board, but shall continue to have all other rights and obligations of membership.

4. As appointed representatives of their respective member districts, each Board Member shall be responsible for providing the following information to his or her respective member district: (a) quarterly information and updates to the school committee on the programs and services provided by the Collaborative; (b) quarterly financial information of the Collaborative; (c) a copy of this Collaborative Agreement and any amendments; (d) a copy of the annual budget and tuition rates; (e) a copy of the annual report and financial audit; (f) notification of applications for real estate mortgages; (g) a copy of any capital plan approved by the Board; and (h) any additional information as may be requested by a vote of the school committee of the member district.

5. No Board Member shall delegate his or her duties or powers or send a representative in his or her place as a voting Board Member and no member district shall delegate the rights, responsibilities, or duties of its appointed representative Board Member to any other individual, unless the member district is replacing the appointed representative Board Member with that individual.

ARTICLE VI

Indemnification

Neither the Executive Director nor any Board Member shall be liable to the Collaborative for any act or omission of the Executive Director or any Board Member or be held personally liable in connection with the affairs of the Collaborative except only liability arising out of his or her own willful misfeasance, bad faith, gross negligence, or reckless disregard of duty to the Collaborative or its members districts.

Neither the Executive Director nor any Board Member shall be personally liable for any debt, claim, demand, judgment, decree, liability or obligation of any kind of, against, or with respect to the Collaborative or arising out of any action taken or omitted for or on behalf of the Collaborative and the Collaborative shall be solely liable therefore and resort shall be had exclusively to the Collaborative property for the payment or performance thereof, and the Executive Director and each Board Member shall be entitled to full indemnity and full reimbursement out of Collaborative property, including, without limitation, fees and disbursements of counsel, if, contrary to the provisions hereof, the Executive Director or such Board Member shall be held personally liable.

The Executive Director and his or her legal representatives and each Board Member and his or her legal representatives shall be indemnified by the Collaborative against all liabilities and expenses, exclusive of amounts paid to the Collaborative, including judgments, fines, penalties, amounts paid in settlement and counsel fees, incurred in reasonable settlement of any action, suit or proceeding to which the Executive Director or such Board Member or his or her legal representatives may be made a party or otherwise involved by reason of his or her capacity as the Executive Director or a Board Member, except only liabilities and expenses arising out of

his or her own willful misfeasance, bad faith, gross negligence or reckless disregard of duty to the Collaborative as finally adjudged in such action or, in the event of settlement or termination of such action without final adjudication, as determined by independent counsel for the Collaborative. Said right of indemnification shall be in addition to any other rights to which the Executive Director or such Board Member may be entitled as a matter of law or which may be lawfully granted to him or her.

ARTICLE VII

Finance

1. The Collaborative's fiscal year shall commence on July 1 and end on June 30 of the following year. All funds of the Collaborative shall be deposited into and shall comprise the Valley Collaborative Fund (the "Collaborative Fund"). All monies paid by the member and non-member districts and social agencies, and all grants or donations from the federal government, state government, charitable foundations, private corporations, or any other source shall be paid to the Board and deposited into the Collaborative Fund. The Treasurer of the Collaborative, subject to the direction of the Board, shall have the authority to receive and disburse funds without further appropriation.

2. Revenues of the Collaborative shall be derived from the following sources:

- A. Program Tuition: The costs of the Collaborative's programs, as determined by the Executive Director and approved by the Board, shall be assessed to the member and non-member districts based on the combined cost of providing such programs to the Collaborative's students and the number of students enrolled in the Collaborative's programs from the respective member and non-member districts. A non-member surcharge may be assessed to a non-member district based on each student enrolled from such non-member district, at the recommendation of the Executive Director, and by an annual vote of the Board.
- B. Fees for Services. The Collaborative may charge a fee, as determined by the Executive Director and approved by the Board, for contracted services to be provided by the Collaborative.

- C. Donations, Grants, and Contributions: The Executive Director may, with the approval of the Board, from time to time accept donations, grants or contributions from governmental and private sources, whether in cash or in kind, which will further the purpose of the Collaborative.

3. The Board shall approve on or before December 15 the program tuition rates and fees-for-services for the next fiscal year beginning on July 1.

4. Annual Budget, Assessment of Costs, and Payment of Tuition and Fees

The Board shall annually determine the Collaborative budget consistent with the timelines, terms, and requirements set forth in Massachusetts General Laws, Chapter 40, Section 4E, regulations promulgated by the DESE, and this Collaborative Agreement. The Board shall propose a budget for the upcoming fiscal year by December 15 of the preceding fiscal year. The proposed budget shall identify all of the programs and services to be offered by the Collaborative and the corresponding costs, and contain all planned financial activity for the upcoming fiscal year. Expenditures from grant funds, the Collaborative Fund, and other funds not designated as general funds that by law may be expended by the Board without further appropriation shall be segregated in the budget. The general fund budget shall segregate all operating expenditures, capital expenditures, debt service payments and deposits to capital reserve.

The proposed budget shall include the methodology used to determine tuition rates and fees-for-services to be paid by member and non-member districts, which shall be based on the combined cost of providing such programs and services. A non-member surcharge may be assessed on non-member districts based on each student enrolled from a non-member district, at the recommendation of the Executive Director, and by an annual vote of the Board. Tuition costs and fees-for-services shall be paid by member and non-member districts on a monthly basis as invoiced by the Collaborative.

The proposed budget shall be discussed at a public meeting of the Board and notice shall be provided to each member district at least fourteen (14) calendar days before the date of the Board meeting at which the proposed budget will be discussed. The Board shall adopt the final budget by an affirmative majority vote at a subsequent meeting no earlier than ten (10) business days following the Board meeting at which the budget was first proposed. The Treasurer shall certify and transmit the budget and tuition rates and fees-for-services for the upcoming fiscal year to each member district no later than February 1 of the preceding fiscal year.

All budget amendments after certification and transmission by the Treasurer shall be proposed at a public meeting of the Board, and must be approved by a majority vote of the Board to take effect. Any amendment to the budget that results in an increase in tuitions rates or fees-for-services must (a) be provided to the member districts within thirty (30) calendar days of the public meeting of the Board at which such amendment is first proposed; (b) voted on by the Board at a public meeting of the Board not more than fourteen (14) calendar days after the Board meeting at which such amended was first proposed; and (c) certified and transmitted by the Treasurer to the member districts within thirty (30) calendar days following the effective date of such amendment. The Board has the authority to reduce tuition rates and fees-for-services to member and non-member districts when doing so is determined to be in the best interest of the Collaborative.

5. Borrowing, Loans, and Mortgages

The Board may authorize the borrowing of funds or enter into short or long-term agreements or mortgages, and acquire or improve real property to support Collaborative operations. All borrowing, loans, and mortgages shall be discussed at a public meeting of the Board. The Board shall investigate options related to borrowing, loans, and mortgages in order

to determine that the terms related to any borrowing, loans and mortgages are the most favorable available at the time of the application. The Board shall determine, at a public meeting, through a majority vote, that the terms related to borrowing, loans, and mortgages are (a) cost-effective; (b) necessary to carry out the purpose and objectives for which the Collaborative is established; (c) in the best interests of the Collaborative and its member districts; (d) consistent with this Collaborative Agreement; and (e) consistent with standard lending practices. When the borrowing or short or long-term agreements or mortgages are for the approved acquisition or improvement of real property, the Board shall (a) provide notice to each member district within thirty (30) calendar days of applying for real estate mortgages; and (b) discuss its intent to apply for a real estate mortgage at a public meeting of the Board prior to the meeting of the Board at which the final vote is taken.

6. Surplus Funds

At the end of the fiscal year, unexpended general funds, as defined by 603 CMR 50.07, plus any previous year's remaining surplus funds, as determined through the Collaborative's financial statements, will be considered cumulative surplus funds. On an annual basis, the Board shall, upon review of the Collaborative's audit results for the previous fiscal year, determine by a majority vote the final dollar amount of cumulative surplus funds. Surplus funds shall not include funds deposited in a capital reserve as provided for in 603 CMR 50.07(10), funds deposited in trust in accordance with Massachusetts General Laws, Chapter 32B, Section 20, or any amounts prepaid for tuition or services in accordance with Massachusetts General Laws, Chapter 40, Section 4E. As set forth in 603 CMR 50.07(9), in no event shall cumulative surplus funds exceed twenty-five percent (25%) of the previous fiscal year's general expenditures from the Collaborative Fund.

Cumulative surplus funds may, at the discretion of the Board, be retained and carried forward in subsequent budget cycles to fund its operations or may be distributed to member districts. The Board shall vote annually to determine whether cumulative surplus funds will be retained by the Collaborative or whether all or some percentage of such funds will be distributed to the member districts or credited to support programs and services offered to member districts. In the event an amount of cumulative surplus funds is to be distributed or credited to the member districts, each member district's share will be apportioned in accordance to its tuition payments to the Collaborative for the previous fiscal year.

7. Capital Reserve Fund

The Collaborative may create a capital reserve fund to support costs associated with the acquisition, maintenance, and improvement of fixed assets, including real property, pursuant to a capital plan. Funds in a capital reserve account may be used only for the project or purpose for which the account is established. The establishment or revision of a capital reserve shall be subject to the approval of two-thirds (2/3) of the member school committees. Any request for approval of a capital reserve fund must state the reason for the reserve and a limit on the balance that may be held in the reserve. Deposits into the capital reserve shall be proposed and approved through the budget process. In the event that the purpose for which the capital reserve was created requires modification, the Board shall revise its capital plan and provide notice to all member districts. If any member district does not vote to disapprove the revised capital plan within a forty-five (45) calendar day period, that member district shall be deemed to have approved the revised capital plan.

ARTICLE VIII

Procedure for Termination of the Collaborative

A member district may request that the Board initiate proceedings to terminate the Collaborative by giving notice to all other member districts and the Executive Director at least nine (9) months prior to the end of the fiscal year. Within thirty (30) calendar days of such request, the Board shall meet to discuss the request to terminate the Collaborative and determine necessary steps with respect to such proposed termination. A majority vote of the Collaborative Board is required to terminate the Collaborative, which termination shall only be effective at the end of the fiscal year during which such vote is taken. Any vote to terminate the Collaborative must be taken by the Board no less than one hundred eighty (180) calendar days prior to end of the fiscal year in which such vote is taken. Following an affirmative vote by the Board to terminate the Collaborative, the Executive Director shall, within thirty (30) calendar days of such vote, provide written notice of such termination to the member districts and non-member districts served by the Collaborative, as well as the DESE. Upon termination of the Collaborative, its unencumbered net liabilities and assets, including cumulative surplus funds, capital assets and reserve funds, equipment, materials and supplies shall be distributed to member districts on a pro-rata basis, based on average enrollment for the preceding three (3) years of the member districts in the Collaborative's programs and services. Prior to the effective termination of the Collaborative, the Board shall have a final independent financial audit of the Collaborative prepared, including an accounting of assets and liabilities, a copy of which shall be made available to each member district.

Upon a vote to terminate the Collaborative, the Board shall prepare a closing plan to be shared with each member district, which also shall be submitted to the DESE. The closing plan documents shall include without limitation:

1. A process for determining the appropriate disposition of federal/state funds, equipment, and supplies.
2. Identification of the member district(s) responsible for maintaining all fiscal records upon termination of the Collaborative.
3. Identification of the member district(s) responsible for maintaining student, employee, and program records upon termination of the Collaborative.
4. The plans of the member districts to accommodate the programs and services formerly provided by the Collaborative.
5. A process for determining the appropriate disposition of all assets of the Collaborative, including capital property owned by the Collaborative.
6. A process for meeting all liabilities of the Collaborative, including obligations for post-employment benefits.
7. Copies of the minutes of the meetings of the Board and the member districts' recording of the vote to terminate the Collaborative.
8. The effective date of the termination.
9. A copy of the final independent financial audit of the Collaborative, including an accounting of assets and liabilities of the Collaborative and the disposition of same.

In the event that the Collaborative receives notice from the DESE of its intent to revoke its approval of this Collaborative Agreement, the Collaborative shall initiate the process of the termination of the Collaborative.

ARTICLE IX

Procedure for Withdrawal of Member Districts

A member district may withdraw from the Collaborative as of the end of any fiscal year upon a vote of its school committee, provided that such member district school committee provides advance written notice of its intention to withdraw by December 31 of such fiscal year, with an effective withdrawal date of June 30, and provided that all approvals for such withdrawal, including the approval of the Board and the Massachusetts Board of Elementary and

Secondary Education, have been obtained by April 30 of such fiscal year. Written notification of a member district's intent to withdraw from the Collaborative shall include (a) notification addressed to the Chairperson of the Board and the Executive director that the member district has voted to withdraw from the Collaborative as of June 30 of the fiscal year, and (b) a copy of the minutes from the school committee meeting in which the member district voted to withdraw from the Collaborative.

Within thirty (30) days of notification of a member district's intent to withdraw from the Collaborative, an amendment shall be prepared to reflect such withdrawal. This Collaborative Agreement shall then be amended to reflect such withdrawal, subject to and in accordance with Article XI.

Upon withdrawal from the Collaborative, a former member district shall not be entitled to any assets or portion of assets of the Collaborative, including any capital assets, reserve funds, equipment, materials and supplies; provided, however, that within sixty (60) calendar days after the annual independent financial audit of the Collaborative is submitted to and approved by the Board for the fiscal year at the end of which the withdrawal was effective, the Board shall conduct a vote to determine if cumulative surplus funds, if any, for the fiscal year in which the member district withdrew will be distributed to the withdrawing member district. If approved by a majority vote of the Board, the Collaborative shall distribute to the withdrawing member district a pro-rata share of any such cumulative surplus funds , if any, for programs in which its students enrolled and for which it paid program tuition, based upon the average student enrollment of such member district of the programs of the Collaborative for the preceding three (3) years. A withdrawing member district shall remain responsible for any financial

commitments or obligations to the Collaborative existing as of the end of the fiscal year, as well as the liabilities of the withdrawing member, if any, arising in the course of its membership.

The withdrawal of any member district at any time shall not affect the status of the Collaborative under Massachusetts General Laws, Chapter 40, Section 4E, except that, if after the withdrawal of a member district, less than two member districts remain, the Board shall initiate termination proceedings as set forth in Article VIII.

ARTICLE X

Procedure for Admitting New Member Districts

A school committee for any town, city, or regional school district may seek membership of the Collaborative through a majority vote of such school committee. Notice of request for admission to the Collaborative must be received by the Executive Director or the Board's Chairperson no later than December 31 of the fiscal year preceding the fiscal year for which such school committee seeks admission. Upon receipt of the prospective school committee's notification, the Board will consider the request at its next regularly scheduled Board meeting. Upon a majority affirmative vote by the Board to admit any new school committee, this Collaborative Agreement shall be amended subject to and in accordance with Article XI to reflect said school committee as a member district of the Collaborative.

New member districts shall be effectively admitted as of July 1 of the fiscal year provided that all required approvals, including that of the Board and the Massachusetts Board of Elementary and Secondary Education, are obtained by April 30 of the fiscal year prior to the fiscal year in which the new member is to be admitted to the Collaborative. The authorizing votes of the Collaborative Board may provide for the deferral of said admission until July 1st of the subsequent fiscal year. Following approval for admission to the Collaborative and

continuing until the actual date of admission, an incoming member district may designate a non-voting representative to the Board.

ARTICLE XI

Procedure for Amending this Collaborative Agreement

The Collaborative Agreement of the Valley Collaborative may be amended from time to time, as needed, pursuant to the following procedure:

1. Any member district, Board Member, or the Executive Director may propose an amendment to this Collaborative Agreement.
2. The proposed amendment shall be presented in writing to the Executive Director and the Chairperson of the Board no less than thirty (30) calendar days prior to a scheduled meeting of the Board at which it shall first be discussed. No less than ten (10) business days prior to the Board meeting at which the amendment is to be first discussed, the Executive Director shall cause copies thereof to be sent to all Board Members and the chairs of the school committees of the member districts, together with notice as to the time and place of the first reading of the proposed amendment.
3. Following the first reading of any proposed amendment and any changes as requested by the Board, the Executive Director shall, upon approval of the Board, submit the proposed amendment to the DESE for initial review.
4. Following the initial review by the DESE, the Executive Director shall make such changes, if any, to the proposed amendment as the DESE requires.
5. No less than ten (10) business days prior to the next scheduled Board meeting at which the proposed amendment is to be discussed a second time, the Executive Director shall cause copies thereof to be sent to all Board Members and the chairs of the school committees of the member districts, together with notice as to the time and place of the second reading of the proposed amendment.
6. The proposed amendment shall be read a second time at the next scheduled Board meeting subsequent to the DESE review, at which time, in order to be approved, there must be a majority vote of the Board in favor of the amendment. Following approval by the Board, the amended Collaborative Agreement shall be submitted by the Chairperson of the Board and the Executive Director to the chairs of the school committees of the member districts for a vote to approve the amended agreement.
7. If approved by a majority of the member districts, and once the member districts have signed the amended Collaborative Agreement, the Executive Director shall

submit the signed amended Collaborative Agreement, consistent with 603 CMR 50.03, to the Commissioner of the DESE for approval by the Massachusetts Board of Elementary and Secondary Education .

8. The amended Collaborative Agreement shall become effective as of the date of approval by the school committees of the Collaborative's member districts and the Massachusetts Board of Elementary and Secondary Education.

ARTICLE XII

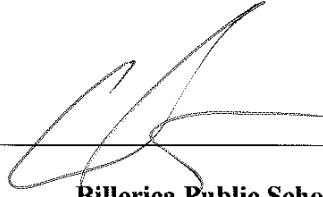
Non-Discrimination

The Valley Collaborative does not discriminate in its programs, activities, facilities, employment, or educational opportunities on the basis of race, color, creed, age, disability, gender, gender identity, religion, national origin, ancestry, sex, sexual orientation, genetic information, or any other protected class, under state or federal law, and does not tolerate any form of discrimination, intimidation, threat, coercion, and/or harassment that insults the dignity of others by interfering with their freedom to learn and work.

**APPROVAL BY THE
MEMBER DISTRICT SCHOOL COMMITTEES**

This Amended and Restated Collaborative Agreement shall take effect upon the date of approval of the Massachusetts Board of Elementary and Secondary Education, as indicated by the signature of the Commissioner of the DESE below, and shall continue until terminated, revoked or amended. This Amended and Restated Collaborative Agreement is authorized by a vote of each of the Member District School Committees, signed by the chair of each Member District School Committee, and signed by the Commissioner of the DESE.

[Remainder of Page Intentionally Left Black – Signature Pages to Follow]



Billerica Public Schools
School Committee Chairperson

12-18-13

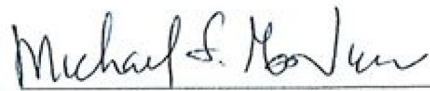
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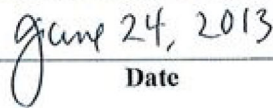
**Chelmsford Public Schools
School Committee Chairperson**

19 December '13

Date

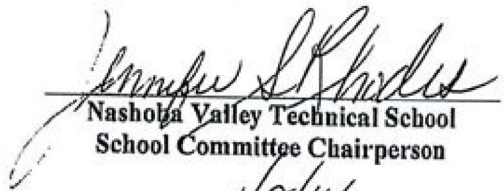


**Dracut Public Schools
School Committee Chairperson**



Date

Alison S. Manigault
Groton-Dunstable Regional School District
School Committee Chairperson
November 22, 2013
Date


Nashoba Valley Technical School
School Committee Chairperson
1/8/14
Date

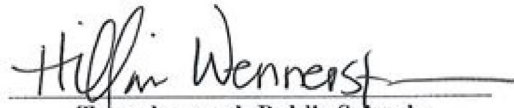

North Middlesex Regional School District
School Committee Chairperson
12-12-13
Date



Tewksbury Public Schools
School Committee Chairperson

12/11/13

Date


Tyngsborough Public Schools
School Committee Chairperson

Date



Westford Public Schools
School Committee Chairperson
1/6/14

Date

A handwritten signature in blue ink, appearing to read "Mark Hunter", is written over a horizontal line.

Commissioner of the Department of Elementary
and Secondary Education

1-16-2014

Date



2024 - 2025 Academic Calendar

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

July 2024						
Su	Mo	Tu	We	Th	Fr	Sa
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August 2024						
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September 2024						
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October 2024						
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November 2024						
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December 2024						
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January 2025						
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February 2025						
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March 2025						
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April 2025						
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May 2025						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June 2025						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

	First/Last Day of Summer Program
	*Professional Development Day All Staff - No School for Students
	No School/Holiday/School Vacation
	Professional Development Day for Professional Staff - No School for Students
	Last Day of School Year (0 snow days used)

	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
	Early Release - High School Graduation Day

Valley Collaborative by the Numbers



Analytical Review 2023-2024

Valley Graduates and Outcomes

Transitional Programming will graduate 15 students

- 2 will attend Valley's adult program
- 6 will attend other adult programs
- 4 will pursue employment
- 3 will pursue other options



Alternative Programming will graduate 18 students

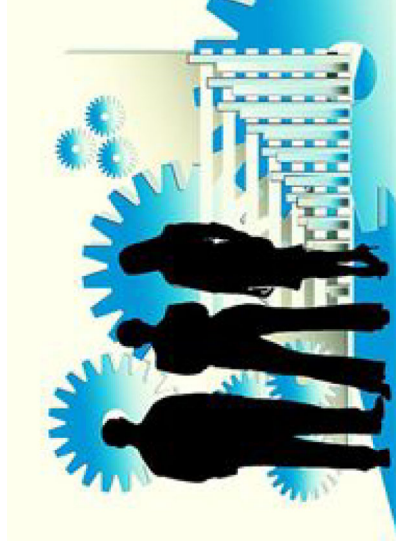
- 11 Students attending college
- 7 students are joining the workforce

This year...

- 2 students completed the Peterson school electrical course
- 1 student took dual enrollment classes (MCC)
- 17 students participated in Valley internships program

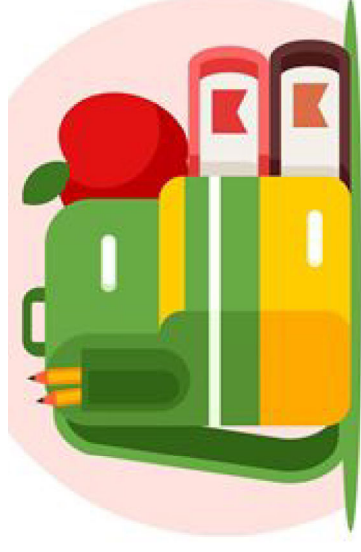
Adult Program

- 128 Individuals Served
- 11 Paid Group Worksites
- 26,622 Total hours worked by individuals in Group Employment this year
- 10 Volunteer Sites
- 37 Independently employed individuals
- 25 Unique Independent Employers



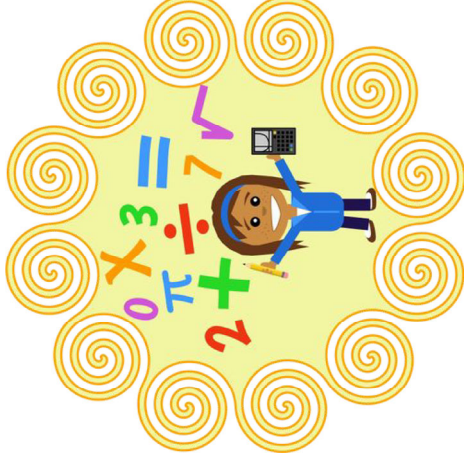
Elementary School

- 30 students received haircuts from the mobile barber
- 21 school-wide events were held this year
- 5 school spirit weeks were held this year
- 220 community based enrichment activities (including field trips)



Valley Elementary, Middle, and High School IXL Performance

- 8,425 questions answered (almost double the amount from last year)
- 180 skills mastered



Reading Comprehension

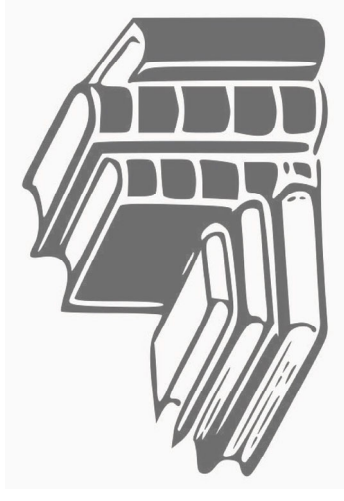
Test Participation and Growth for Middle School and High School Programs 2023-2024

- Average MS and HS Lexile gain of 77L
- Alt MS 6th grade- Avg Lexile gain of 54L
- Alt MS 7th grade-Avg gain of 95L
- 13% increase in reading proficiency in Middle School Grades, 7% increase in reading proficiency in High School Grades

- Over 100 Reading Inventory Assessments Completed (90% Completion Rate Across All Sites)
- Over 130 Hours of Direct Classroom Instruction in the form of Weekly or Daily Reading Groups

Elementary School

- 5,034 books now inventoried into our library
- 411 books checked out in the 23/24 school year



Elementary School mClass Dibels Data For students with reading abilities Grades 1-6

Beginning of Year- Reading Accuracy of reading a grade
level passage

At Benchmark-60%

*84% of students in data sample participated in
assessment

End of Year- Reading Accuracy of reading a grade level
passage

At Benchmark-72%

*96% of students in data sample participated in
assessment

Valley MS & HS Sports

- 8 basketball players, across programs, participated during the season
- 7 players participated in the Greater Boston Basketball League tournament (GBBL)
- Overall record: 10-2
- Made it to the semi-finals in the GBBL Tournament
- Valley students won the 3 point and free throw contest
- 91 students represented Valley in the Special Olympics

Valley Outdoor Education

- 15 students participated throughout the year, 46 summits combined and 17 camping nights
- Climbed 6 mountains (Watatic, Wachusett, Monadnock, Major, Willard, Greylock)
- Completed 3 overnights (Highland Center, Cardigan, Lonesome Lake)
- In total the club hiked 232 miles and covered 69,413 ft of elevation



Valley's School Store

- Each dojo point is worth 25 cents
- Students have the opportunity to earn up to 16 points per day which is equivalent to \$2.00.
- Popular items include headphones, Pokémon cards, Valley gear, or a token for the prize machine where the top prize is to pick an item from the treasure chest.
- School store items range in price from \$0.25-\$50.00.



Case Study

Decrease Ouburst Duration
9/6/2023-5/10/2024

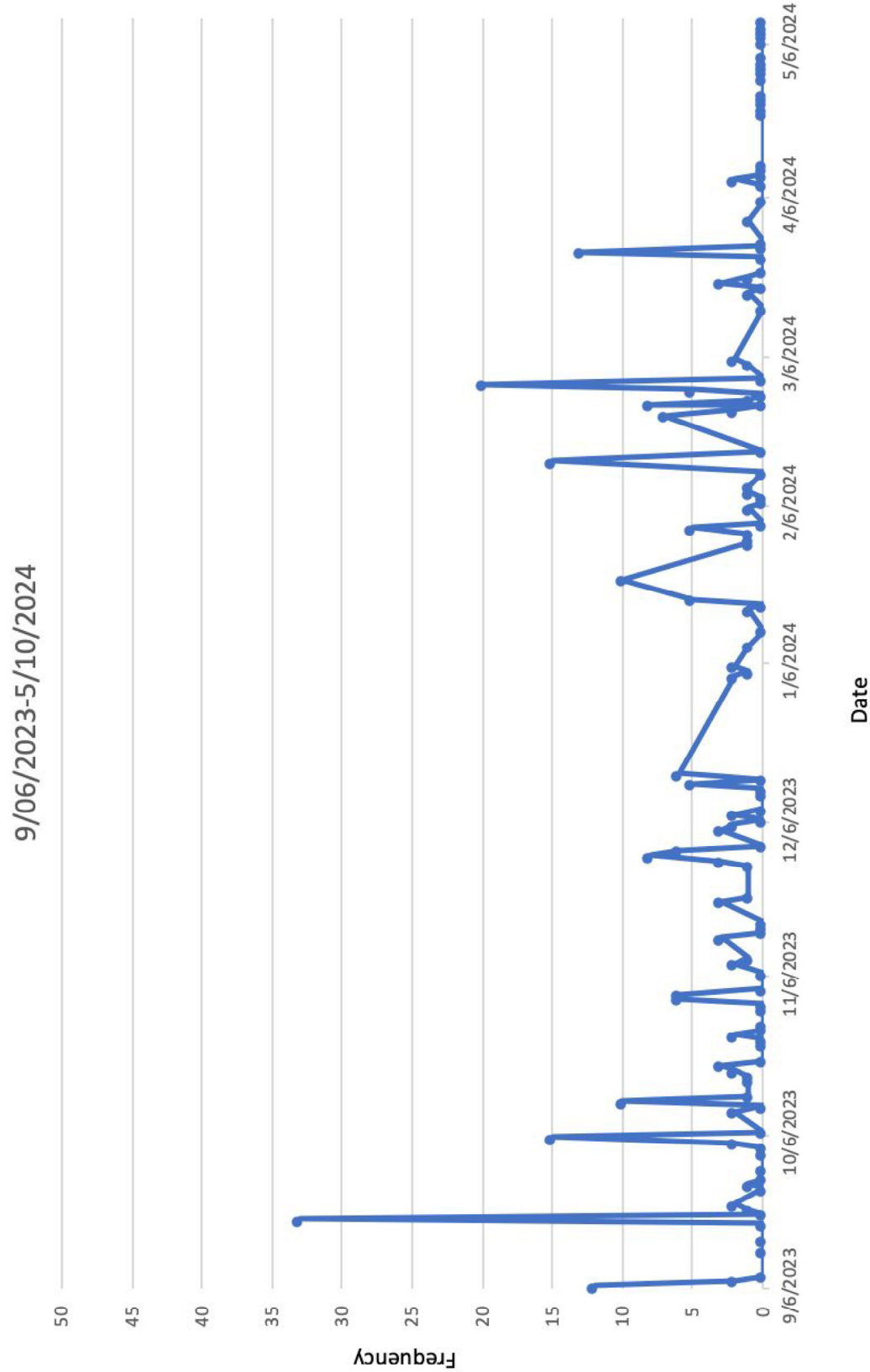


Case Study

Decrease Outburst Frequency
9/06/2023-5/10/2024



Case Study



Transitional High School Vocational Programming

- 27 total vocational sites, 10 new sites
- 7 internship sites
- 30 students attend work each day
- 5 Students employed part-time/after school



Technology Additions

Hardware

- 10- ClearTouch

Interactive

- 1- HP Color LaserJet Pro
- 1- Mac Mini
- 30- iPads
- 2- MacBook Air
- 42- HP Laptops
- 10- Monitors
- 9- Charging Carts
- 1-NAS Server
- 5- Phones
- 1- Samsung TV

Applications

- PDQ Deploy & Inventory Software
- Aruba Central AP Foundation 5 year Subscription
- PRTG Pressler
- Monitoring system
- Acronis Cyber Protect
- GoGuardian Student protection
- SchoolPass

Nursing

Department of Public Health Mandated Screenings:

- 85 Vision and Hearing Screenings
- 78 Postural Screenings
- 49 BMI Screenings

Food Services

- 340 turkey dinners were served this past Thanksgiving at the elementary, middle, and high school programs in addition to Billerica Housing Authority catering.

The Wish Project

- 100 backpacks with school supplies were distributed
- 123 families received gifts for the holiday season
- 100 Mother's Day bags with self-care items were distributed

Induction/Mentor Program

- 13 mentors
- 18 mentees



2024 School Trip Chicago, IL

- 5 days, 4 nights
- approx. 2,000 miles traveled by plane and car
- 21 students and adults
- 6 staff chaperones
- Wrigley Field tour and Cubs game, Sears Tower tour, and Seadog River and Lake Architecture Tour Sunset Cruise were some of the favorite attractions



Central Administration

11 Executive Park Drive, N. Billerica, MA 01862 | Tel: (978) 528-7826 | www.valleycollaborative.org

MEMORANDUM

To: Valley Collaborative Board of Directors
From: Dr. Chris A. Scott, Executive Director
Date: September 12, 2024
Re: Staff Making a Difference Award Presentation

We would like to recognize Valley's staff members of the month from the Technology and Maintenance/Facilities Departments for all their hard work and dedication to the Collaborative.

Technology Department

Mazyar Moshtaghi
Francisco Laureano

Maintenance/Facilities Department

Renato Silva
Sandra Morency
Fabio Agostinho
William G. Hernandez
Nobelita Bento

Required Action:

- None

Attachments:

- None

Center for Educational Options
Education Collaborative Team

June 2024

Celebrations, Updates, Resources & Reminders



Celebrations

As another school year draws to a close, we hope you are able to reflect on the incredible journey you've undertaken with your students, families and staff. We are sure it has been a year filled with growth, learning, and unforgettable memories. As you prepare to bid farewell to this academic year, take a moment to celebrate your achievements. Massachusetts education collaboratives continue to provide essential programs and services in the face of unanticipated and often difficult challenges. Once again, we would like to take this opportunity to express our gratitude to everyone who has contributed to making the school year a success.

In the upcoming weeks, we urge you to spend time with loved ones and refresh your spirit. We thank you for your continued dedication to the students and families of the Commonwealth.

Ruth and Paulajo

Updates & Online Resources

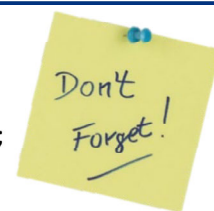
- [Duties and Responsibilities of Appointed Representatives and Collaborative Boards of Directors](#)
- [Guidance on Education Collaboratives' Use of Surplus Funds](#)
- [Amending a Collaborative Agreement](#)
- [Education Collaborative Closing Guidelines](#)
- [Collaborative Agreement Checklist](#)
- [Waivers to Provisions of 603 CMR 50.00](#)
- [State Ethics Commission](#) - For questions concerning Massachusetts' Ethics Law, employees may call the Commission at (617) 371-9500 to request confidential advice from the Attorney of the Day or send the Commission a request for written advice.
- [Open Meeting Law](#) - For questions concerning Massachusetts' Open Meeting Law, you may visit the Division of Open Government website, call (617) 963-2540, or send an email to: openmeeting@mass.gov.

Watch the [DESE education collaborative webpages](#) for these updates:

- FY24 Annual Independent Audit Guidelines
- FY24 Annual Report Guidelines
- Amending a Collaborative Agreement
- Collaborative Checklist

Reminders

- Update Board Membership in the BMMS – July 1st and as needed during the school year;
- Provide the Board of Directors Meeting schedule for 2024-25; and
 - ✓ hold at least 6 (six) board meetings;
 - ✓ post the 2024-25 board meeting schedule to the collaborative website, with the anticipated date for the annual independent audit review;
 - ✓ post all agendas and approved board meeting minutes per Open Meeting Law requirements; and
 - ✓ submit an electronic (pdf) board packet to the [Education Collaborative Team](#), prior to each scheduled board meeting.



Massachusetts Department of Elementary and Secondary Education

Center for Educational Options

We expand and enhance high quality educational options for learners of all ages, and ensure equitable access for all, especially for those who have been historically underserved.

Con Ganas • Kaizen • Ujima • Stewardship • Learner-Centered • Equity and Racial Equity



FOR IMMEDIATE RELEASE

Media Contact: Liz Kalaijian

Tuesday, June 25, 2024

Phone: (781) 428-3299

Email: elizabeth@jgpr.net

Educational Collaboratives in the Northeast Region of MOEC Host Joint Second Annual Special Olympics



Educational Collaboratives in the Northeast Region of MOEC recently hosted its joint second annual Special Olympics event. (Photo courtesy Massachusetts Organization of Educational Collaboratives)

DANVERS — The Massachusetts Organization of Educational Collaboratives (MOEC) is pleased to share that four Educational Collaboratives in its Northeast Region including, CREST Collaborative, SEEM Collaborative, Northshore Education Consortium and Valley Collaborative recently hosted the second annual Special Olympics event.

On Tuesday, June 11, CREST Collaborative Executive Director Bob Jokela, SEEM Collaborative Executive Director Cathy Lawson, Northshore Education Consortium Executive Director Francine Rosenberg and Valley Collaborative Executive Director Chris Scott, along with staff and students from their respective schools, participated in a variety of Special Olympic activities at St. John's Preparatory School in Danvers.

Throughout the day, more than 350 students from all four collaboratives participated activities including, Field Hockey, Hoop Roll Relay, Throwing, Jumping, Soccer, Obstacle Course, a Walk / Run and Football.

Following the activities, all student participants were recognized during a small ceremony on the stage built for the Special Olympics Game day and were awarded with medals.

The team of organizers held a Welcome Ceremony prior to the lunch break. The students walked the track with each collaborative team led by a couple of students holding a banner representing each collaborative.

A few words of thanks was shared by CREST Collaborative's Bill Bryant, Kevin O'Grady School Family Center Director Sheila Guiney, SEEM Collaborative's Program Lead Susan Tremonte, Valley Collaborative's Program Lead Katie Nutile, Valley Collaborative's Program Lead Peter Loring and Kevin O'Grady School Principal, Martha Krol.

A special shout out to Terri Keilty and Gabe Velasquez who represented The Special Olympics Organization, and St. John's Prep Liaison Mike Evans.

The second annual Special Olympics event was organized by Bill Bryant of CREST Collaborative.

By joining forces, these organizations not only demonstrated their commitment to promoting diversity and inclusion but also enriched the lives of countless athletes and their supporters.

"As we reflect on the success of our second Special Olympics event, we extend our heartfelt gratitude to everyone who contributed to this remarkable event," said CREST Collaborative Executive Director Bob Jokela.

"Events such as these, shine a light on the efforts of collaborative programs across the state to create an inclusive society where individuals of all abilities, have the opportunity to learn and thrive," said Executive Director Joanne Haley Sullivan.

About Massachusetts Organization of Educational Collaboratives

[MOEC](#) represents the Commonwealth's 25 educational collaboratives. MOEC serves as the voice of its members and works to develop a full appreciation for and understanding of educational collaboratives at the state, regional, and local levels. MOEC is the Commonwealth's primary advocate for collaboratives and the critical role they play in the Massachusetts educational system.



Educational Collaboratives in the Northeast Region of MOEC recently hosted its joint second annual Special Olympics event. (Photo courtesy Massachusetts Organization of Educational Collaboratives)



Educational Collaboratives in the Northeast Region of MOEC recently hosted its joint second annual Special Olympics event. (Photo courtesy Massachusetts Organization of Educational Collaboratives)



Educational Collaboratives in the Northeast Region of MOEC recently hosted its joint second annual Special Olympics event. (Photo courtesy Massachusetts Organization of Educational Collaboratives)

A message from Massachusetts Organization of Educational Collaboratives

John Guilfoil Public Relations, P.O. Box 22, Georgetown, MA 01833, United States, (617) 993-0003



Valley Collaborative Elementary School Newsletter

September 2024



Principal's Welcome

I would like to introduce myself to any families that may not know me. My name is Heather Mackay and I am the principal here at the Valley Elementary School. We are so excited to start this new school year! Our staff had a great two weeks off to rest and rejuvenate following our ESY program. It feels great to be back in our school building and we are looking forward to all the great programming we have planned for your student. If you have any questions please do not hesitate to reach out to me at hmackay@valleycollaborative.org or 978-528-7843.



September Events

September 20th: Reptile Show

Reptile Shows of New England is coming to our school for an informative and exciting presentation. They will bring in a variety of reptiles from around the world for a captivating hands-on educational experience.

September 26th: Barber Visit

The barber will return for haircuts on 9/26 in advance of picture day. Information and permission slips will be sent home.

Student & Health Packets

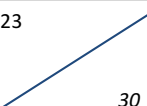
If you have not already done so, please return back completed student/health packets.

—
Please call 978-528-7843 with any questions.

Open House

Open House will be held on 9/25/24 at 3pm.
Please RSVP to Karen Blackburn: 978-528-7855
kblackburn@valleycollaborative.org

September Calendar

Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4 <i>First Day for Students</i>	5	6
9	10	11	12	13
16	17	18	19	20 <i>Reptile Show</i>
23  30	24	25 <i>Early Release for Students / Open House 3pm</i>	26 <i>Barber Visit</i>	27

Looking Ahead

October 1st - Picture Day
October 2nd - Dentist Visit

—
Details for both events will be sent home in the coming weeks



Central Administration

11 Executive Park Drive, N. 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: September 12, 2024
Re: Safety Committee Update

Safety continues to be the central focus behind everything we do at Valley. Never has this been more evident than our most recent and continuing safety and security improvements.

At our schools in Tyngsborough and 40 Linnell Circle in Billerica, Valley is currently replacing every classroom and office door lock with locksets equipped with push-button locks. We've also installed audible door alarms on our hallway and break room exit doors in Tyngsborough. In addition, a pilot program is underway whereby 10 classrooms throughout the collaborative have been installed with premium emergency lockdown kits which include items such as flashlights, water pouches, and biohazard bags to be used in the event of a lockdown situation.

Finally, new classroom number signs have been ordered and will be installed at our Tyngsborough elementary school. These signs are a two-piece set where one will be affixed outside the class on the hallway wall and the other will be installed above the classroom doorway and will jet out into the hall making classroom number identification simple and easy from any point in the hallway.

Required Action:

- None

Attachments:

- None

From: [Renato Silva](#)
To: [Chris Scott](#)
Subject: Facilities Update
Date: Saturday, August 31, 2024 12:53:42 PM

Hello Dr. Scott,

I went to the Billerica Town Hall on Friday to speak with the Director of Permitting, Mark LaLumiere, but he was not in the office. I left a message with one of the receptionists. She stated that if we continue to not hear from him, to reach out to his superior - Clancy Main, Billerica Town Manager.

Below is an update on what Facilities have done at each Valley site this summer.

Tyngsborough Elementary School

- Stripped and waxed all classrooms, offices, and hallways
- Shampooed all classroom rugs
- Deep cleaned every classroom
- Deep cleaned every trash bucket and recycle bin throughout the building
- Used Kaivac to clean all bathrooms
- Installed new keyed audible alarms on exterior doors in gym, breakroom, and the exits at ends of the main halls
- Washed all windows inside and out
- Installed new washer and dryer unit
- Installed new plexiglass in Beat Cave window
- Installed protective lattice above music room in gym
- Painted every interior classroom door, break room door, and all 3 rooms inside gym
- Painted exterior doors at ends of hallways
- With George Richardson from Tyngsborough Public - replaced several bulbs and ballasts throughout the building
- Deep cleaned all chairs in lobby and common area
- Installed/replaced Exit signs in West Street hallway
- Repaired faulty oven and dishwasher equipment in cafeteria kitchen
- Replaced all glass in cafeteria serving line/sneeze guard with new tempered safety glass

On Order/Pending

- New signage for each classroom and office
- 4 new 12' cafeteria tables
- New teacher's desk for social worker

- Premium classroom lockdown kits to be installed as part of pilot program
- New push-button locksets for every classroom and office door

11 Executive Park Drive

- Stripped and waxed all offices, milieus and common areas
- Deep cleaned every office
- Deep cleaned every bathroom
- Washed all windows inside and out
- Installed new shades in offices with faux-windows
- Mowed the lawn

On Order/Pending

- Large furniture order for Matt's program
- Lockers in milieu and new staff room - options were presented to Matt, to be reviewed with you.

25 Linnell Circle

- Stripped and waxed all rooms and common areas
- Broke down greenhouse/grow room and moved materials into storage
- Deep cleaned greenhouse/grow room
- Installed new and moved existing ClearTouch's and televisions
- Deep cleaned every trash bucket and recycle bin throughout the building
- Deep cleaned the refrigerator and freezer in main kitchen

40 Linnell Circle

- Stripped and waxed every classroom, office, hallway, and milieu
- Deep cleaned every trash bucket and recycle bin throughout the building
- Deep cleaned all classrooms and offices
- Washed all windows inside and out - both floors
- Deep cleaned all time-out mats
- Deep cleaned the HVAC vents
- Deep cleaned the walk-in refrigerator
- Deep cleaned the Bistro dining room

Deep cleaned lobby chairs

- Delivered large smallwares order and new prep table for Bistro kitchen
- Replaced all ceiling tiles in Bistro dining room
- Replaced all ceiling tiles in I.T. Room
- Installed new kitchenette and full-size refrigerator outside Nick and Dave's office
- Installed new floor lamps in each classroom and office in Nick's program
- Installed desks in Brian's office on first floor
- Patched, repaired, and painted various holes, scrapes, and dings throughout the building
- Mowed lawn and installed flowers around main Valley Collaborative parking lot sign
- Deep cleaned every van - some were cleaned multiple times

On Order/Pending

- Large furniture orders for both Nicole and Nick's programs
- Ordered under-counter refrigeration unit for Bistro serving area
- Premium classroom lockdown kits to be installed as part of pilot program
- New under-counter dishwasher for second floor kitchen
- New push-button locksets for every classroom and office door

Sandy, Ian, Fabio, Luis, William, Bella, Shawn, and Pam all volunteered to stay late and come in on a couple of Saturdays to ensure all of our goals were met and the buildings were ready for the launch of the school year - truly a team effort.

I would also like to single-out Sandy, Bella, Fabio and William for special recognition. All three went above and beyond what was asked of them and were invaluable throughout the summer.

Thank you, Dr. Scott, and please let me know if you have any questions.

Regards,

Renato Silva
School Safety and Facilities Manager
Valley Collaborative
40 Linnell Circle
Billerica, MA 01821
978-528-7831 (office)

From: [Heather Mackay](#)
To: wrussell@tyngsboroughma.gov
Cc: [Chris Scott](#)
Subject: Thank You
Date: Tuesday, August 6, 2024 10:02:06 AM

Good Morning Chief Russel,

I wanted to send a heart felt thank you to you and your firefighters who came on Friday to give our students an amazing Touch A Truck event.

They were caring, patient and so insightful of the student profiles and needs. The kids and staff had such a wonderful day and pictures were sent to parents who were over the moon their students were able to participate in that. Seeing the ladder go up, spraying water from the hose, watching your firemen get dressed in their gear and showing all the tools they use to help people in emergencies. A special thank you to Captain Brad Biscornet and Lt. Pellettier for organizing and facilitating the event.

We appreciate working with your department always!

Heather Mackay, M.Ed
Principal/Special Education Administrator
Valley Collaborative
Elementary School
[Tyngsborough, MA 01879](#)
(978) 528-7843

From: [Wes Russell](#)
To: [Heather Mackay](#)
Cc: [Chris Scott](#)
Subject: Re: **[**EXT**]** Thank You
Date: Tuesday, August 6, 2024 12:13:37 PM

You don't often get email from wrussell@tyngsboroughma.gov. [Learn why this is important](#)

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

Thank you for your kind words. I will pass the praise along to the crew. Making these positive connections with kids is an important part of our job. It's great to hear when we are successful.



Wes Russell

Fire Chief & Emergency Management Director
Tyngsborough Fire Department

978-649-7671 | www.tyngsboroughfire.com/

wrussell@tyngsboroughma.gov

26 Kendall Road, Tyngsborough MA



On Tue, Aug 6, 2024 at 10:02 AM Heather Mackay <hmackay@valleycollaborative.org> wrote:

Good Morning Chief Russel,

I wanted to send a heart felt thank you to you and your firefighters who came on Friday to give our students an amazing Touch A Truck event.

They were caring, patient and so insightful of the student profiles and needs. The kids and staff had such a wonderful day and pictures were sent to parents who were over the moon their students were able to participate in that. Seeing the ladder go up, spraying water from the hose, watching your firemen get dressed in their gear and showing all the tools they use to help people in emergencies. A special thank you to Captain Brad Biscornet and Lt. Pellettier for organizing and facilitating the event.

We appreciate working with your department always!

Heather Mackay, M.Ed

Principal/Special Education Administrator

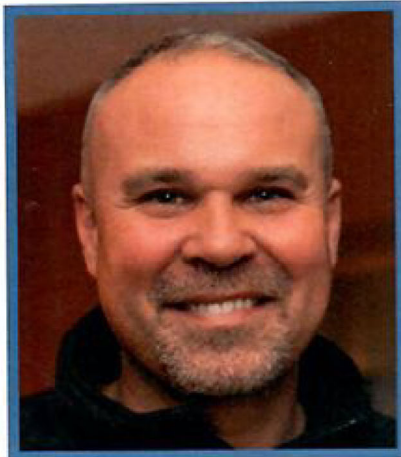
Valley Collaborative

Elementary School

[Tyngsborough, MA 01879](#)

(978) 528-7843

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SGT. Ian G Taylor - EOW 4/26/2024

Thank you doesn't even begin to cover how grateful we are for your support of Sgt. Ian Taylor's family, friends and co-workers.

Words can not express the BPD's thanks.

Valley Collaborative / Chris Scott

*Thank you so much for
your condolences.*

Chief Roy Frost

