

Valley Collaborative
Board of Directors Meeting
Thursday, September 11, 2025 ▪ 10:00 a.m.

[Virtual Meeting Link: Public Attendees](#)

Action Required

- I. Approval of Minutes
 - a. Board of Directors Meeting, General Session Minutes: June 12, 2025
- II. Financial Update
 - a. FY'25 & FY'26 Update
 - Balance Sheet as of 6.30.2025
 - Income Statement as of 6.30.2025
 - 25% Cumulative Surplus Calculation
 - b. Treasurer's Report(s)
 - May 2025
 - June 2025
 - July 2025
 - c. PARS Statement(s)
 - May 2025
 - June 2025
 - Annual Statement
 - July 2025
 - d. Enrollment Update
- III. 25 Linnell Circle, Billerica: Parking Lot Lease
 - a. Vote to approve Middlesex Retirement Board Lease for 25 Linnell Circle Parking Lot

No Action Required

- IV. Quarterly Reports on Collaborative Business – FY'25 Fourth Quarter
- V. Communications
 - State Agencies:
 - a. DESE Collaborative Newsletter June 2025
 - b. MOEC Financial Leadership Welcome Letter
 - c. MOEC Executive Director Email – seeking Financial Leadership series help
 - Valley Program Updates:
 - a. Elementary School September Monthly Newsletter – N/A
 - 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 – N/A
- f. Facilities Update – N/A

Community and Staff:

- a. Staff Appreciation Email
- b. Ticketing Report School Year 2024 – 2025
- c. Chief Roy Frost (Billerica PD) Email
- d. June Fundraiser Update

**Valley Collaborative Board of Directors
General Session Meeting Minutes
June 12, 2025
10:06 a.m. – 11:29 a.m.
11 Executive Park Drive, N. Billerica, Massachusetts**

Board Members Present: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

Board Members Absent:, Ms. Brenda Theriault-Regan, Dr. Michael Flanagan, Mr. Brad Morgan, Mr. Steven Stone

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

Also Present: Thomas Lent, Barrow Lent LLP; Dr. Anthony Bent, Consultant for M.A.S.S. Association of School Superintendents; Lori Likus, Creative Coaching Consultant; Linda Balfour, Academy Facilitator, Office of Professional Learning

Call to Order: Dr. Jay Lang, Chairman, convened the Collaborative Board Meeting at 10:06 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, individual and staff. Dr. Scott presented the Community Partner Award Presentation. The Board, Dr. Anthony Bent and Dr. Scott presented the Annual Dr. Anthony Bent Leadership Award to Heather MacKay, Principal, Valley Elementary School.

Valley Collaborative Updates

Dr. Anthony Bent and Linda Balfour presented the survey and conclusions of the Professional Learning Update and Valley Collaborative Team Culture Analysis. Lori Likus presented the Valley Collaborative District Improvement Plan Update, a copy of which was within the Board Binder and which concluded the five-year district improvement plan. Dr. Scott presented the Member District Special Education Directors Satisfaction Survey, a copy of which was included within the Board Binder. There was no further discussion.

Communications

Dr. Scott directed the Board to the communications contained within the Board materials, including specifically the 2025-2029 Valley Collaborative Technology Plan and 25 Linnell Billerica Parking Request/Lease. There was no further discussion.

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 Dr. Christopher Chew and seconded by Dr. Geoff Bruno, a quorum of voters being present, it was voted:

VOTED: To approve the General Session Meeting Minutes for the Board of Directors dated January 9, 2025, as revised.

The vote was 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

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

VOTED: To approve the General Session Meeting Minutes for the Board of Directors dated April 10, 2025.

The vote was 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

Board Governance 2025-2026

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. Dr. Jay Lang indicated his willingness to remain the Board Chairperson for the 2025-2026 School/Fiscal Year.

On a motion made by Dr. Denise Pigeon and seconded by Dr. Christopher Chew, 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 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

Appoint/Re-appoint Committee Members

On a motion duly made by Dr. Christopher Chew and seconded by Dr. Kerry Clery, 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 2025-2026 School Year.

The vote was 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

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 Financials, the 4th Quarter projections and Fiscal Year 2025 conclusions. Dr. Scott reviewed the revenues, expenses, budget and enrollment. Dr. Scott summarized her recent discussions with PARS representatives, with the Collaborative's Treasurer Heidi Kriger. 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 2024-2025 enrollment numbers throughout the School Year.

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. Dr. Scott acknowledged the Collaborative staff.

On a motion made by Dr. Denise Pigeon and seconded by Dr. Geoff Bruno, 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 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew,

Dr. Kerry Clery, Dr. Geoff Bruno

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 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. Christopher Chew and seconded by Dr. Denise Pigeon, 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 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

Treasurer's Report/Evaluation/Contract

Ms. Heidi Kriger, the Collaborative Treasurer, provided the Board with her report which covered the months through May 2025. 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 Dr. Denise Pigeon 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 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

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. Denise Pigeon and seconded by Dr. Christopher Chew, 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 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

On a motion made by Dr. Kerry Clery and seconded by Dr. Geoff Bruno, 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 2025-2026 School Year with the term of the agreement to be July 1, 2025 through June 30, 2026.

The vote was 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

Approval of 2025-2026 Employee Handbook

Dr. Scott referenced the employee handbook contained within the Board materials indicating that there were a singular substantive change relating to the Board's prior amendment the criteria for the OPEB Trust. There was no further discussion.

On a motion made by Dr. Denise Pigeon and seconded by Dr. Christopher Chew, 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 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

Approval of 2025-2026 Student & Family Handbook

Dr. Scott referenced the student and family handbook contained within the Board materials indicating that there were changes to the telephone and internet policies for the 2025-2026 School Year. There was no further discussion.

On a motion made by Dr. Denise Pigeon and seconded by Dr. Denise Pigeon, 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 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

Surplus Furniture

Dr. Scott recommended to the Board that certain furniture be designated and disposed of as surplus to the Collaborative and requested that the Board vote to designate the items surplus. Dr. Scott presented the approximate fair market value of the items as described in more detail within the Board materials. The Board discussed.

On a motion made by Dr. Christopher Chew and seconded by Dr. Geoff Bruno, a quorum of voters being present, it was voted:

VOTED: The Board designates the Woodshop Tools identified and presented at this meeting as surplus and authorizes the Executive Director to offer such items to the member districts and, if necessary, afterwards to dispose of the items as the Executive Director deems in the best interest of the Collaborative.

The vote was 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

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.

On a motion made by Dr. Christopher Chew and seconded by Dr. Geoff Bruno, a quorum of voters being present, it was voted:

VOTED: To adjourn the Board meeting.

The vote was 5-0. Yes: Dr. Jay Lang, Dr. Denise Pigeon, Dr. Christopher Chew, Dr. Kerry Clery, Dr. Geoff Bruno

Dr. Jay Lang adjourned the Collaborative Board Meeting at 11:29 a.m.

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

- School Year 2024-2025 Electronic Board Binder Board Meeting, June 12, 2025

Respectfully Submitted,

Dr. Jay Lang, Chairman

Dated: _____



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
Mr. James George, Accountant/Business Manager
Date: September 11, 2025
Re: Financial Update - FY'25 & FY'26

Valley Collaborative's FY'25 school year was very successful programmatically and financially.

- The financial position of the Collaborative remains very strong. The total assets at June 30, 2025 is \$25,662,367 (unaudited). This includes \$8,282,784 (unaudited) held in the OPEB Trust at June 30, 2025.
- Capital fund remains fully funded at the end of FY'25 (\$1.5M).
- Change in net assets from operations in FY'25 was approximately \$1,664,940 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 \$1M 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 25+%. After the final audit is complete in November, an additional vote will be required to return additional funds. At this time, we are expecting this number to be between \$100,000 and \$200,000 more.
- Valley has entered into FY'26 in a very strong financial position. Valley's payroll costs for July and August was \$3.428M and revenue was \$4.059M. Valley's Accountant/Business Manager James George will reconcile the first quarter of FY'26 and it will be presented at the October 23, 2025 Board of Directors' Meeting.

Required Action:

- None

Attachments:

- Balance Sheet June 30, 2025
- Income Statement June 30, 2025
- Preliminary 25% Surplus Calculation
- PARS May 2025
- Treasurer's Report May 2025

- PARS June 2025
- Treasurer's Report June 2025
- PARS July 2025
- Treasurer's Report July 2025
- Annual PARS Statement
- Enrollment Update

Valley Collaborative
Interim Statement of Net Assets
For the Period Ended
June 30, 2025

UNAUDITED	
ASSETS	
Current Assets	
Cash and Cash Equivalents	\$ 7,399,300
Restricted Investments - OPEB	8,282,784
Accounts Receivable, Net	2,818,294
Prepaid Expenses and Other Assets	44,287
Cash Held for Member Districts	504,466
Total Current Assets	<u>19,049,131</u>
Non-Current Assets	
Land & Building	4,352,391
Furniture, Equipment, and Leasehold Improvements,	
Net of Depreciation	2,260,845
Construction in Progress	-
Total Non-Current Assets	<u>6,613,236</u>
TOTAL ASSETS	<u>\$ 25,662,367</u>
LIABILITIES AND NET ASSETS	
Current Liabilities	
Accounts Payable and Accrued Liabilities	\$ 1,096,758
Other Liabilities	2,516,128
Member District Accounts (Settlement)	504,466
Total Current Liabilities	<u>4,117,352</u>
Total Liabilities	<u>4,117,352</u>
Net Assets	
Operating - Unrestricted	7,595,495
Restricted - Student Activities	42,696
Reserved - OPEB Trust	5,793,588
Reserved - Capital	1,500,000
Invested in Capital Assets, Net of Related Debt	6,613,236
Total Net Assets	<u>21,545,015</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 25,662,367</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, 2025
210 of 210 (100%) School Days

UNAUDITED		
	AMENDED BUDGET	ACTUAL
REVENUES		
Services	\$ 22,045,706	\$ 22,197,833
State Contracts	4,500,000	4,483,224
Other	649,609	692,920
Interest	55,000	54,508
Total Revenues	27,250,315	27,428,485 101%
EXPENSES		
Salaries	18,094,418	18,016,511
Employee Benefits	3,425,027	3,251,631
Operating Expenses	2,615,800	2,978,119
Leases & Rentals	593,247	608,161
Depreciation	751,000	909,123
Total Expenses	25,479,492	25,763,545 101%
Change in Net Assets - Operating	\$ 1,770,823	\$ 1,664,940
Non Operating Activities		
Return to Member Districts	-	-
Non-Operating Expenses (1)	(1,000,000)	-
Change in Net Assets	\$ 770,823	\$ 1,664,940

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

[illegible]

Valley Collaborative
Cumulative Surplus Calculation - FY 25
As of June 30, 2025 Projection

(A)	Voted Cumulative Surplus as of June 30, 2024	5,803,352
(B)	Amount of (A) used to make contribution to OPEB Trust PY	-
	Amount of Current Year Return Previously Voted	(1,000,000)
(c)	Unexpended FY 25 General Funds	1,782,313
(D)	Cumulative Surplus as of 6/30/25	6,585,665
(E)	FY 25 Total General Fund Expenditures	25,712,361
(F)	Cumulative Surplus Percentage	25.61%
	Estimated Amount of Excess Cumulative Surplus as of June 30, 2025	<u><u>157,574</u></u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
MAY 31, 2025**

		<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	\$ 4,539,987.34	\$ 1,439,193.13		\$ (239,505.01)		\$ (1,316,000.00)	\$ 4,423,675.46
Payroll	a/c 795823	\$ 192,033.96		\$ (1,410,004.61)			\$ 1,320,000.00	\$ 102,029.35
Joe's Bistro	a/c 531401	\$ 4,323.92	\$ 1,608.25				\$ (4,000.00)	\$ 1,932.17
ICS MMDA	a/c 856490	\$ 4,774.85				\$ 2.02		\$ 4,776.87
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>\$ 6,241,234.43</u>	<u>\$ 1,440,801.38</u>	<u>\$ (1,410,004.61)</u>	<u>\$ (239,505.01)</u>	<u>\$ 2.02</u>	<u>\$ -</u>	<u>\$ 6,032,528.21</u>
 MMDT	a/c 0044263747	<u>\$ 1,148,388.73</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,366.67</u>	<u>\$ -</u>	<u>\$ 1,152,755.40</u>
 Total Unrestricted Cash		<u>\$ 7,389,623.16</u>	<u>\$ 1,440,801.38</u>	<u>\$ (1,410,004.61)</u>	<u>\$ (239,505.01)</u>	<u>\$ 4,368.69</u>	<u>\$ -</u>	<u>\$ 7,185,283.61</u>
 PARS OPEB Trust		<u>\$ 7,782,791.87</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (2,087.71)</u>	<u>\$ 243,309.21</u>	<u>\$ -</u>	<u>\$ 8,024,013.37</u>
 TOTAL CASH		<u>\$ 15,172,415.03</u>	<u>\$ 1,440,801.38</u>	<u>\$ (1,410,004.61)</u>	<u>\$ (241,592.72)</u>	<u>\$ 247,677.90</u>	<u>\$ -</u>	<u>\$ 15,209,296.98</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JUNE 30, 2025**

		<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	\$ 4,423,675.46	\$ 2,911,488.21		\$ (169,567.18)		\$ (2,750,000.00)	\$ 4,415,596.49
Payroll	a/c 795823	\$ 102,029.35		\$ (2,046,719.96)			\$ 2,750,000.00	\$ 805,309.39
Joe's Bistro	a/c 531401	\$ 1,932.17	\$ 2,109.98					\$ 4,042.15
ICS MMDA	a/c 856490	\$ 4,776.87				\$ 1.96		\$ 4,778.83
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>\$ 6,032,528.21</u>	<u>\$ 2,913,598.19</u>	<u>\$ (2,046,719.96)</u>	<u>\$ (169,567.18)</u>	<u>\$ 1.96</u>	<u>\$ -</u>	<u>\$ 6,729,841.22</u>
 MMDT	a/c 0044263747	<u>\$ 1,152,755.40</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,225.02</u>	<u>\$ -</u>	<u>\$ 1,156,980.42</u>
 Total Unrestricted Cash		<u>\$ 7,185,283.61</u>	<u>\$ 2,913,598.19</u>	<u>\$ (2,046,719.96)</u>	<u>\$ (169,567.18)</u>	<u>\$ 4,226.98</u>	<u>\$ -</u>	<u>\$ 7,886,821.64</u>
 PARS OPEB Trust		<u>\$ 8,024,013.37</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (2,147.58)</u>	<u>\$ 260,918.31</u>	<u>\$ -</u>	<u>\$ 8,282,784.10</u>
 TOTAL CASH		<u>\$ 15,209,296.98</u>	<u>\$ 2,913,598.19</u>	<u>\$ (2,046,719.96)</u>	<u>\$ (171,714.76)</u>	<u>\$ 265,145.29</u>	<u>\$ -</u>	<u>\$ 16,169,605.74</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JULY 31, 2025**

		<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	\$ 4,415,596.49	\$ 2,654,686.92		\$ (874,300.34)		\$ (1,370,000.00)	\$ 4,825,983.07
Payroll	a/c 795823	\$ 805,309.39		\$ (1,946,122.10)			\$ 1,370,000.00	\$ 229,187.29
Joe's Bistro	a/c 531401	\$ 4,042.15	\$ 1,648.00					\$ 5,690.15
ICS MMDA	a/c 856490	\$ 4,778.83				\$ 2.02		\$ 4,780.85
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>\$ 6,729,841.22</u>	<u>\$ 2,656,334.92</u>	<u>\$ (1,946,122.10)</u>	<u>\$ (874,300.34)</u>	<u>\$ 2.02</u>	<u>\$ -</u>	<u>\$ 6,565,755.72</u>
 MMDT	a/c 0044263747	<u>\$ 1,156,980.42</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,381.53</u>	<u>\$ -</u>	<u>\$ 1,161,361.95</u>
 Total Unrestricted Cash		<u>\$ 7,886,821.64</u>	<u>\$ 2,656,334.92</u>	<u>\$ (1,946,122.10)</u>	<u>\$ (874,300.34)</u>	<u>\$ 4,383.55</u>	<u>\$ -</u>	<u>\$ 7,727,117.67</u>
 PARS OPEB Trust		<u>\$ 8,282,784.10</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (2,206.31)</u>	<u>\$ 49,076.86</u>	<u>\$ -</u>	<u>\$ 8,329,654.65</u>
 TOTAL CASH		<u>\$ 16,169,605.74</u>	<u>\$ 2,656,334.92</u>	<u>\$ (1,946,122.10)</u>	<u>\$ (876,506.65)</u>	<u>\$ 53,460.41</u>	<u>\$ -</u>	<u>\$ 16,056,772.32</u>



VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
5/1/2025 to 5/31/2025

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

Account Summary

Source	Beginning Balance as of 5/1/2025	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 5/31/2025
OPEB	\$7,782,791.87	\$0.00	\$243,309.21	\$2,087.71	\$0.00	\$0.00	\$8,024,013.37
Totals	\$7,782,791.87	\$0.00	\$243,309.21	\$2,087.71	\$0.00	\$0.00	\$8,024,013.37

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	3.13%	1.46%	10.52%	7.84%	7.86%	6.53%	6/24/2015

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

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

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



VALLEY COLLABORATIVE
PARS OPEB Trust Program

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

Account Report for the Period
6/1/2025 to 6/30/2025

Account Summary

Source	Beginning Balance as of 6/1/2025	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 6/30/2025
OPEB	\$8,024,013.37	\$0.00	\$260,918.31	\$2,147.58	\$0.00	\$0.00	\$8,282,784.10
Totals	\$8,024,013.37	\$0.00	\$260,918.31	\$2,147.58	\$0.00	\$0.00	\$8,282,784.10

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	3.25%	6.99%	12.66%	11.12%	8.09%	7.33%	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

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VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
7/1/2024 to 6/30/2025

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 6/30/2025
OPEB	\$7,374,282.50	\$0.00	\$933,532.15	\$25,030.55	\$0.00	\$0.00	\$8,282,784.10
Totals	\$7,374,282.50	\$0.00	\$933,532.15	\$25,030.55	\$0.00	\$0.00	\$8,282,784.10

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	3.25%	6.99%	12.66%	11.12%	8.09%	7.33%	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

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VALLEY COLLABORATIVE
PARS OPEB Trust Program

Account Report for the Period
7/1/2025 to 7/31/2025

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

Account Summary							
Source	Beginning Balance as of 7/1/2025	Contributions	Earnings	Expenses	Distributions	Transfers	Ending Balance as of 7/31/2025
OPEB	\$8,282,784.10	\$0.00	\$49,076.86	\$2,206.31	\$0.00	\$0.00	\$8,329,654.65
Totals	\$8,282,784.10	\$0.00	\$49,076.86	\$2,206.31	\$0.00	\$0.00	\$8,329,654.65

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	0.59%	7.11%	10.64%	9.39%	7.41%	7.28%	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

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Valley Collaborative Programmatic Enrollment Data									
Program	9/15/2024			6/5/2025			9/10/2025		
	Member	Non-Member	Program Total	Member	Non-Member	Program Total	Member	Non-Member	Program Total
Elementary	43	38	81	56	49	105	44	49	93
Middle - ALT Programming	5	11	16	7	10	17	6	5	11
Middle - Transitional Programming	5	9	14	4	14	18	4	14	18
Middle - Transitional ISN	7	3	10	6	3	9	6	3	9
High - ALT Programming	31	21	52	33	21	54	31	20	51
High - Transitional Programming	52	31	83	42	34	76	43	35	78
Totals	143	113	256	148	131	279	134	126	260



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 11, 2025
Re: 25 Linnell Circle, Billerica Parking Lot Lease

Valley Collaborative has needed staff parking space at 25 Linnell Circle, Billerica for over a decade. This remains to be the case. Although we no longer lease building space at 25 Linnell Circle, Billerica, I asked Tom Gibson, Executive Director to approach the Middlesex Retirement Board for consideration to lease the parking lot to Valley Collaborative.

At its Board meeting on June 18, 2025, the Middlesex Retirement Board of directors voted to offer Valley Collaborative a 5-year lease as of July 1, 2025, at a rate of \$1000/month to park 36 vehicles in the front parking lot. (The lot Valley had previously striped and numbered).

It is my recommendation to accept the terms of this lease.

Required Action:

- Vote

Attachments:

- Email from Lisa Maloney, Chief Administrative Officer, Middlesex County Retirement System
- Memo from June 12, 2025 Valley Board meeting regarding "Parking Request – 25 Linnell Circle, Billerica".
- Temporary Parking Agreement

From: [Chris Scott](#)
To: [Lisa Maloney](#)
Cc: [Joia Mercurio](#)
Subject: Re: [EXTERNAL] Temporary Parking- board agenda
Date: Thursday, June 26, 2025 6:54:09 PM

Hi Lisa,
I will bring this matter to the Valley Board at the next Board meeting in September.
Thank you again for your time and consideration.
Best,
Chris
Sent from my iPad

On Jun 26, 2025, at 6:56 PM, Lisa Maloney
<LMaloney@middlesexretirement.org> wrote:

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

Hi Chris-

At its Board meeting on June 18, 2025, the Board ratified the Temporary Parking Agreement that you and Tom had executed.

In addition, after discussion, the Board voted to offer Valley Collaborative a 5-year lease as of July 1, 2025, at a rate of \$1000/month to park 36 vehicles in the front parking lot. (The lot Valley had previously striped and numbered)

Please let me know whether Valley would like to accept the Board's proposal and we can draw up the paperwork.

Thanks,

Lisa

Lisa M. Maloney, Esq.
Chief Administrative Officer
Middlesex County Retirement System
P.O. Box 160
Nutting Lake, MA 01865
Tel: (978) 439-3000
Fax: (978) 439-3050
Email: lmaloney@middlesexretirement.org

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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: June 12, 2025
Re: Parking Request – 25 Linnell Circle, Billerica

Valley has requested the use of 36 additional parking spots from the Middlesex Retirement Board at 25 Linnell Circle, Billerica for overflow parking from the Valley Middle & Transitional High School located at 40 Linnell Circle, Billerica.

Tom Gibson, Executive Director of Middlesex Retirement Board has taken this request to the Middlesex Retirement Board of Directors. It is my understanding that they will be putting together a lease proposal for Valley Collaborative's Board of Directors' consideration at the September Board meeting. In the meantime, Mr. Gibson has sent over a Memorandum of Agreement that we may continue to use the parking at 25 Linnell Circle, Billerica until September 12, 2025 and that they are not liable for any injuries related to this parking request.

Required Action:

- None

Attachments:

- Middlesex County Retirement System – Memorandum of Agreement

MIDDLESEX COUNTY RETIREMENT SYSTEM

MEMORANDUM OF AGREEMENT

This document memorializes the agreement between the Middlesex County Retirement Board (“Board”) and Valley Collaborative (“VC”) regarding VC’s temporary use of the front parking lot of the property owned by the Middlesex County Retirement System, and located at 25 Linnell Circle, Billerica, MA 01865, consisting of 36 spaces as previously designated by VC, under the following terms and conditions:

1. This Agreement shall commence on July 1, 2025 and terminate on September 12, 2025, unless terminated earlier by either party or by execution of a successor Agreement.
2. The parking area described above is to be used for the parking of vehicles only from 7:00 a.m. to 6:00 p.m., and any other use is strictly prohibited.
3. VC agrees that it is solely responsible for any and all injuries and damages which may result directly or indirectly from such use. VC agrees to indemnify and hold harmless the Board, its employees, agents, attorneys and assigns, from any and all liability whatsoever arising from any demand or claim, and from any action, or cause of action resulting directly or indirectly from such use.
4. VC agrees to keep the premises maintained in its current condition during such use, and to remove any debris, trash or other items at the end of the usage period.

Signed and Sealed this __ Day of June, 2025.

Name: _____

Title: _____
on behalf of VC

Thomas F. Gibson, Chairman
on behalf of the Middlesex County Retirement Board



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 11, 2025
Re: Quarterly Reports on Collaborative Business – FY25 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 Report 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 calendar of Valley Collaborative Board of Director meetings. Please note, Valley Collaborative's proposed FY27 budget will be presented and discussed at the December 11, 2025 meeting. Also noteworthy, the Board of Directors meeting on January 8, 2026 will be Valley Collaborative's stakeholder meeting.



We are: On the Move

■ Page 2 Students at Valley Elementary School are wrapping up a very active year.



We are: Showing our Pride

■ Page 3 Students in Valley Middle School's Alternative and Transitional Programs had a year that was as busy as it was fantastic.



We are: Adaptive

■ Page 8 Five individuals in Valley's Adult Program went to an Assistive Technology Fair to learn about devices that can help people with disabilities.

VALLEY COLLABORATIVE

Volume 13, Issue 4 News for the extended Valley Collaborative community Summer 2025

At Valley, We Love What We Do!



EXECUTIVE DIRECTOR DR. CHRIS SCOTT GIVING RAY BUSBY GOLDEN KEYS TO VALLEY COLLABORATIVE. A VALLEY VETERAN, RAY JOINED THE ADULT PROGRAM IN 1994.

Dear Valley Community: Valley's focus on high quality leadership makes the difference. Each year the Dr. Anthony Bent Leadership Award is given to a Valley employee who exemplifies leadership qualities and has made a significant difference to the climate and culture of the collaborative. This award is named in honor of Dr. Anthony Bent. Dr. Bent is a dedicated educator who held central office positions in Watertown and was superintendent in Shrewsbury for fifteen years. In 2008-2009, Dr. Bent was president of the Massachusetts Association of School Superintendents (MASS). Having previously served

(2012-2014) on the Valley Collaborative Board of Directors during his interim superintendency at Groton-Dunstable Regional School District, Dr. Bent has been a long-time supporter and advocate for the great work done at Valley Collaborative. For over a decade, Dr. Bent has facilitated Valley's "Leadership at Every Level" professional development series. This coming year we will, once again, welcome Dr. Bent to share his knowledge and expertise with Valley Administrators and future Administrators.

*continued on page 10

VALLEY COLLABORATIVE

Elementary School: What a Year!

It's been quite a year at Valley Elementary. From adventurous field trips to new clubs and more spirit weeks than we can count, we're ending the 2024-2025 school year on a high note. Here's a look at some of the highlights.

January 10th: **Roller Kingdom.** The school participated in a field trip to a roller rink in Tyngsboro, giving students the opportunity to practice perseverance as they learned how to skate.

February 10th: **Acton Discovery Center Event:** The Acton Discovery Center Traveling Science Program returned to Valley to run hands-on science workshops.

February 10th-14th: **Love and Kindness Spirit Week**—Valley's annual celebration of all things kindness.

March 3rd-7th: **Read Across America Week.** We celebrated Read Across America Week with a reading themed spirit week, door decorating, guest readers, book fair, and other activities to celebrate and promote literacy.

April 4th: **Skateboard Physics Assembly.** A follow-up to our popular presentation on the physics of motion as demonstrated through skateboarding!

April 14th-17th: **Autism Acceptance Spirit Week.** We capped off the week with our annual Autism Acceptance Walk.

May 5th: **Rock Out for Reading** - an assembly geared towards inspiring students to pursue reading as a lifelong adventure through songs and stories.

May 12th-16th: **Mental Health Awareness Spirit Week.** We celebrated our coping skills and explored new skills, encouraging self-care and emotional regulation.

Fishing Club

Thanks to paraprofessional Nick Cote Valley Elementary has a popular new Fishing Club. Students explore local waterways, gain knowledge about different fish species, and develop essential skills like casting, knot tying, and understanding water ecosystems. "Most of them never expected there could be big fish lurking just beneath the surface, so when they feel that tug on the line, it's a thrilling surprise," says Nick, who founded and runs the club. "The look on their faces when they reel in a big bass is priceless—pure excitement and pride." Beyond learning fishing techniques, the club fosters teamwork, patience, and environmental awareness, while also creating lasting memories and friendships. Whether it's a quiet afternoon by the water or the rush of landing a big catch, the Valley Collaborative Fishing Club offers an unforgettable experience where kids build confidence and a deeper connection to nature. ■



JASON KATMADEU-WENDEU, THIRD GRADER, AT WE ROCK THE SPECTRUM.

A few of our favorite things

Louis Lorino, sixth grade, "Legos and friends."

Brian Bolcome, fourth grade, "Fishing Club and field trips."

William Desousa-Diaz, fourth grade, "Fishing, camping, hiking and Mr. Matt!"

Nate Skuse, fourth grade, "Using computers and playing games with friends."

Marnie Stone, fifth grade, "Everything is fun and educational!"

Sophia Stewart, fourth grade, "My Friends."

CJ Lillie, third grade, "Basketball and football."

Colton Tyler, first grade, "Pizza, trade-in, friends and teachers."

Lindsey Lavanga, fifth grade, "Horseback riding and swimming. Swimming is fun. I like it."

David Makayi, first grade, "Going out in the nice weather and bug hunting."



FIRST GRADER CARTER LEWIS SHOWS OFF HIS CATCH.

VALLEY COLLABORATIVE

Valley Middle School: A Busy Year, A Fantastic Year

The 2024-2025 school year kept students in the Middle School's Alternative Program busy both academically and while in the community. In their core academic classes, students were challenged across all content areas. Students solved a 13-year old mystery while reading "The Curious Vanishing of Beatrice Willoughby" by G.Z. Schmidt and gained a better understanding of the parts of the plot in books. They even learned to identify the parts independently in their own books! Mysteries were a huge hit this year. In Science class, students had the opportunity to participate in a STEM project each week! Alka-Seltzer lava lamps and the Egg Drop competition were highlights. Many of our budding engineers' eggs survived the drop off the school roof. Students were able to use coordinates to plot mystery pictures in math as well as participate in a mock restaurant where orders were taken, bills paid and everyone got a little hungry. In History class, there was a heavy focus on civics this year. Students

were challenged to create their own countries including laws, flags, and citizen's rights.

When not in core classes, students enjoyed electives such as basketball, soccer, Geoguesser, and cooking (always with delicious results)! Students even got to adventure out into the community for fun, educational trips at Metro Rock, Altitude Trampoline Park, Honey Pot Hill Orchards, In the Game, the Illusion Museum, Franklin Park Zoo and others! "Valley is the best school. We have fun and we love getting outside! My favorite trip this year was Altitude and I really liked going fishing", stated 7th grader, Anthony Estrada.

The Outdoor Education Club made a resurgence and the club summited mountains such as Mt. Watatic, Mt. Wachusett, North Mountain, Prospect Hill and even Mt. Monadnock! Way to go, team! Sixth grader, Colton Knowlton shared that, "The staff are nice and the best part is the school store and the trips! I really liked going hiking with Pete and Aidan."

As always, the holidays played a large part in the middle school community. At Halloween, students showed off their costumes, raced to eat donuts on a string, and did a mummy race. At Thanksgiving, the program celebrated with a dinner served by teachers and administrators. Students even wrote what they were thankful for and decorated our Thankful Tree. During the winter holidays, students decorated the Christmas tree, participated in the gingerbread house competition, and made gifts for loved ones at You're Fired. Students were certainly busy learning and growing! Let's do it again next year!

Students in the Middle School's Transitional Program had a fantastic and busy school year as well. Here are some of the highlights that the students wanted to share. In Shana Dunlevy's classroom, students raved about the field trips. The group sledding trip was an absolute blast. "My favorite was sledding and going fast. We built a giant jump and all had so much fun", exclaimed 8th grader Keegan Graham when asked to share a highlight from the year. In Victoria Clauson's class, one of the favorite activities this school year was cooking class. Seventh grader Eli Sanchez shared, "My favorite memory that I made this year was cooking class, especially when I got to cook with my friends". Students in Dana Watford and Tina Carrabba's class shared that they had fun making Mother's Day gifts, which tied a Science lesson into an art project. Roman Beyer-Beckford exclaims, "Mom is going to love my plant!" We are looking forward to more fun and adventure in the upcoming school year. ■



VICTORIA CLAUSON'S STUDENTS ENJOYING THE TREATS MADE IN COOKING CLASS. FROM LEFT TO RIGHT: ANDRES DIAZ, LUCHIEN MOORE, ARIANNA ARIAS, LIANNA WARNER, GABE DUENAS, DENIS MORIS

VALLEY COLLABORATIVE

Valley Transitional High School, Transitional Programs: Independence, Here We Come!

The theme at Valley Transitional High School this year has been ‘independence.’ Thanks to the hard work of Vocational Coordinator, Scott Morin, more students are being placed in internships that correspond to their interests. Scott says that the surge in placements reflects both the rebound of Valley’s vocational programming after COVID and the students’ hard work. “We have a number of students who’ve been in classes for a few years and have shown a lot of growth,” says Scott. “They’re gaining in confidence and independence and were ready to take the next step.” The next step is going from working on a vocational jobsite with a job coach to having an internship in the community utilizing the supervisor of the company or business as the natural support. They are working independently in the surrounding communities gaining experience for when they leave Valley.

Kai Steil-Ng is one of them. During his time at the Transitional High School, Kai demonstrated a passion for all things mechanical and a real desire to be challenged. Once Kai settled on diesel engine repair as something he was eager to try, Scott reached out to a local repair shop to try to get him an internship. “He’s been there almost six months and it has worked out really well,” says Scott. “Now they’re looking to hire him part time.”

Brandon Taipe discovered his love of cooking while working at the Bistro downstairs at Valley. After he decided that it was time to expand his culinary skills, Scott reached out on his behalf to the manager of the 99 Restaurant nearby. One thing led to another and before long Brandon had been

granted an internship in the kitchen, assisting with prep, and a chef’s coat to match. “He told his parents and the rest of the team that he absolutely loves going to work,” says Scott.

Nathan Dunham is yet another success story. After he indicated his desire to work independently, Scott and other team members began searching for possible positions near Nathan’s home in Hudson. These days, Nathan takes his electric scooter to a nearby Shaws, where he works during the week as well as on the weekends. While he began with janitorial work, managers at the store have indicated that there are opportunities for advancement.

While Scott’s tireless advocacy is a major reason for these successful placements, he’s quick to credit all of the other staffers at Valley who are part of its unique team-based approach. Vocational staff, therapists and teachers work together to assess students’ readiness for vocational next steps. Some students know exactly what they’d like to do, says Scott, in which case it’s time to begin reaching out to employers. For those students who aren’t yet settled on a particular field or position, the team presents them with opportunities. Scott also credits community partners who’ve bought into the mission at Valley for being willing to consider student interns. “They want to see the kids be successful,” says Scott. “They also appreciate that we’re there to provide supports and guidance if the student needs them.”

However the process plays out, it’s working—and so are a growing number of Valley students. ■



BRANDON TAIPE IN THE KITCHEN AT THE 99 RESTAURANT IN BILLERICA.

Vocational Placement Sites

99 Restaurant, Billerica MA
 Merrimack Valley Truck Service, Tyngsboro MA
 Shaws, Hudson MA
 Dynamic Computers, Medford MA
 Ocean State Job Lot, Tewksbury and North Reading MA
 Strongwater Farm, Tewksbury MA
 Mem Tea, Wakefield MA
 Pro-Fitness, Billerica MA
 Trader Joes, Nashua NH
 Bitty and Beaus, Cambridge MA
 Tewksbury Auto, Tewksbury MA
 Market Basket, Billerica MA

VALLEY COLLABORATIVE

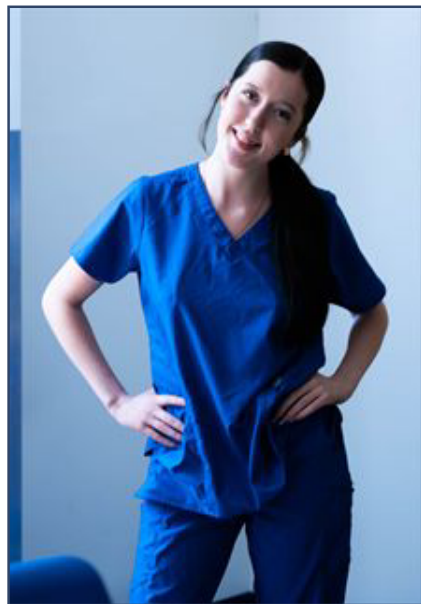
Valley Transitional High School, Alternative Programs: Many Paths to Success

The Transitional High School Alternative Programs are celebrating another successful year, as students in all three of our sites are finding their way and planning for the future. Here's a look at three students who exemplify Valley's individualized approach.

Career readiness in action

Madison Murray, an eleventh grader in the Vocational Program, represents a Valley first: dual enrollment in the nursing program at Northern Essex Community College. "I've always been interested in nursing," says Madison. "I brought it up to the staff at Valley and they helped me figure out how to do it." Combining course work at Valley and NECC, Madison is now about to take her CNA test. Most importantly, she'll be closing out her time at Valley ready to have a career.

"Our vocational program is all about career readiness," explains



VOCATIONAL STUDENT MADISON MURRAY WILL LEAVE VALLEY PREPARED TO BEGIN A NURSING CAREER.

Principal Nick LeClair. "This experience means that when Madison leaves Valley she'll be able to live independently."

Choosing a path

While some students arrive at Valley with a clear sense of what they want to do after graduation, the majority do not. The unique structure of the program helps facilitate a process of exploration. In addition to the vocational program where students can try their hands at a variety of occupations, including carpentry, landscaping, culinary arts and digital media. Two sites, Psi for underclassmen and Delta for eleventh and twelfth graders, help students choose a path for high school and what comes after.

Matt Maille is currently a Psi tenth grader and is already thinking ahead to life after school. "When students pick a site for eleventh and twelfth grade, we're focused on what feels right for them, here at Valley and in the future," explains Nick. Matt is considering moving into the vocational program because a hands-on job in a field such as construction appeals to him. He also likes the teachers in the program. "The staff and student personalities mesh well," says Matt, singling out one staff member for special praise. "Daniel MacDonald is a real one." Nick says that the staff think just as highly of Matt. "He's a quiet leader and beloved on his site." And while Matt still hasn't made a final decision about a site for the next school year, the decision making process is part of what makes Valley's approach so effective, says Nick. "Students in all



BILLY COCHRAN RECENTLY MADE THE DRACUT HIGH SCHOOL BASEBALL TEAM.

of our programs have access to the same opportunities. The question is what is going to be best for the individual student?"

A better fit—and a hit

Billy Cochran started at Valley's Transitional High School but was convinced that the school's alternative programming would be a better fit for him. Fast forward a year and that assessment has proven correct. A 10th grader in the Delta Program, Billy is excelling at his academics and has already made the high honor roll three times. He's especially passionate about physics and STEM, and has already started to think about where he might like to go to college. His proudest accomplishment this school year has been back in Dracut, his home school district, where Billy tried out for and made the high school baseball team. "My first time at bat I got a hit," says Billy. "We're very proud of him," says Nick. "Billy is a great friend to everyone on his site, and to see him doing so well in his classes and now on the baseball field is really something." ■

VALLEY COLLABORATIVE

Valley School Trip, 2025 Destination: Montreal, Canada



AMONG THE HIGHLIGHTS OF VALLEY'S SCHOOL TRIP TO MONTREAL: LEARNING ABOUT GRAFFITI AND DESIGNING OUR OWN HATS.

On May 12, 2025, our Valley travelers hopped on a bus and started their journey on their 11th annual adventure. This time our final destination was Montreal, Canada! A total of twenty-eight individuals from Valley's Adult Program and Transitional High School made the trek across the northern border. It was truly a trip for all interests.

We spent the week learning about Montreal's history. We found the Pointe-a-Calliere, the Archaeological Museum, quite interesting. We learned about North America's first collector sewer and the people who lived in Montreal during the 1830's. St. Patrick's church and Notre Dame Basilica were exquisite sights to see.

We enjoyed the many picture taking viewpoints, especially at the top of Mount Royal, the highest point in Montreal. Our ghost

tour was a fun way to see Old Montreal's sites too. When asking Nora Bailey about her favorite moments on the trip, she exclaimed, "The ghost tour! I liked learning about the history and I have watched videos about other ghost stories too".

Montreal's Science Centre, Bio Dome and Rio Tinto Alcan Planetarium were a big hit with our travelers. We especially liked the Science Centre as it gave us the opportunity to learn with our hands and explore life science, human evolution and participate in an immersive quest of the Great Canadian North. Student Dylan Tran said, "I liked seeing the fish at the Bio Dome."

We got to express ourselves and show our creativity through graffiti. We learned how to do different techniques and create graffiti on our very own hats.

2025 Valley School Trip by the Numbers

Number of Valley sites that participated in the trip: 2

Number of travelers: 28

Distance from Valley to Montreal, Canada: 295 miles

Top elevation of Mount Royal: 768 feet

Year that the first collector sewer for rainwater was constructed in Montreal: 1832

Number of trips taken by Valley travelers: 11.

VALLEY COLLABORATIVE

Valley School Trip, 2025 Destination: Montreal, Canada



THE BELL CENTRE OF THE MONTREAL CANADIENS HOCKEY TEAM WAS A FAN FAVORITE FOR THE VALLEY TRAVELERS

»continued from previous page

The individuals and students especially enjoyed this activity and proudly wore their hats the rest of the trip.

The Sugar Shack or *La Sucrierie de la Montagne* was another great way to immerse ourselves in French Canadian culture. We learned how maple syrup is made and enjoyed French Canadian folk music and traditional cuisine. Nora Bailey said “The Sugar Shack’s pancakes and maple syrup were so good!” We got to participate in traditional French Canadian music and were given a lesson on playing wooden spoons

during a song.

Lastly, touring the Bell Centre of the Montreal Canadiens hockey team was a fan favorite. We got to go behind the scenes and tour the Canadiens’ locker room, learn how the ice is made and how the venue sets up for concerts. Our group was very engaged with our tour guide and was even able to give them reminders that we are big BRUINS fans! Being one of our sports super fans, student Kayden Bovardi said without a doubt that, “the Bell Centre was my favorite.”

Overall, it was a great historical and cultural experience that they will never forget. ■

2025 Valley School Trip Highlights

Touring the Bell Center of the Montreal Canadiens hockey team.

The Sugar Shack or *La Sucrierie de la Montagne* for pancakes.

Montreal’s Science Centre, Bio Dome and Rio Tinto Alcan Planetarium

Pointe-a-Calliere Archaeological Museum

Mount Royal, the highest point in Montreal

VALLEY COLLABORATIVE

Adult Services: Exploring Assistive Technology

The Valley Collaborative Adult Program is regularly seeking out opportunities for the individuals to learn about new technology and initiatives that can help them with every day life, while also learning about new and exciting ways to receive standardized, on-going support. Recently, five individuals attended an Assistive Technology Fair hosted by the Northeast Arc at the Liberty Tree Mall. This event gave the individuals the chance to learn about a range of assistive technology products from 30 vendors.

Northeast Arc, a nonprofit which helps people with disabilities become full participants in the community; choosing for themselves how to live, learn, work, socialize and play, sees Assistive Technology enabling people to live productive, meaningful, and dignified lives. According to the

group, “Assistive Technology can enhance an individual’s ability to perform daily tasks, facilitate independent living, and contribute to a higher quality of life.”

The individuals who attended the event got the chance to see and learn about medication management devices, communication devices and software, mobility aids, smart home technology, remote supports, adaptive gaming and recreation, and more.

Jenilee Lopez was one of the Valley individuals who made the trip to Danvers, said that she was impressed by what she saw at the Assistive Technology Fair. “It was pretty cool. I saw a lot of different things and it was very interesting. I liked seeing all the technology and how it will help all the individuals,” says Jenilee. “I like how everything there could help people be more independent. Even for people who can’t speak they had a bunch of different things that could help them communicate.”

While not every individual served by Valley Collaborative uses Assistive Technology in their everyday life, new and creative ideas are regularly being introduced to the populations served by DDS and can create a drastic change in an individual’s life. As an example, Valley supports an individual who utilizes remote check-ins with an outside agency through smart home technology. This allows for a new level of independence for the individual as they receive necessary supports through a remote system and therefore is able to operate with a new level of independence while still having regular check-ins to ensure safety and care.

Many of the initiatives presented at the Assistive Technology Fair are still in their infancy. However, the



FIVE INDIVIDUALS FROM VALLEY'S ADULT PROGRAM RECENTLY TRAVELED TO DANVERS TO ATTEND NORTHEAST ARC'S ASSISTIVE TECHNOLOGY FAIR IN BACK: BRIAN, GREG AND JACOB. IN FRONT: JENILEE AND KAITLYN.



INDIVIDUALS IN VALLEY'S ADULT PROGRAMS CHECK OUT SOME OF THE OFFERINGS ON DISPLAY AT THE NORTHEAST ARC ASSISTIVE TECHNOLOGY FAIR.

more awareness that can be brought to them and the more opportunity the individuals and their families have to access these products and services, the more personal growth that can be achieved. This happens through providing individuals with tools necessary to operate at their highest level without compromising the level of support they receive.

Services provided for Adults with Disabilities have come a long way over the years, but it is never enough to get complacent and be satisfied with the supports out there. It is imperative that individuals and their support teams continue to advocate for new and creative ways to help individuals maximize their potential while getting their specific needs met. The DDS Assistive Technology Fair was a great way to facilitate this process. ■

VALLEY COLLABORATIVE

Valley Collaborative 2024-2025: Our Year in Pictures



VALLEY MIDDLE SCHOOL STUDENTS LOGAN STURGIS AND COLTON KNOWLTON ON A WINTER HIKE.



4TH GRADER NELSON LOZADA WITH VISITING BARBER PHILL MCNULTY



MORE THAN 50 FAMILY MEMBERS ATTENDED VALLEY ELEMENTARY'S ANNUAL COMMUNITY BREAKFAST.



STUDENT TONY ESTRADA SHOWS OFF HIS BIG CATCH.



MIKE KOCZAN AND RENEE BOYDEN, ON THE JOB AT CHELMSFORD HIGH SCHOOL.



STUDENT ERIK REGO COOKING UP TURKEY WITH CHEF BRIDGET FOR FRIENDSGIVING.

VALLEY COLLABORATIVE

At Valley, We Love What We Do!

**continued from cover*

The 2025 Dr. Anthony Bent Leadership Award will be presented to Heather MacKay, Valley Elementary School Principal. Previous award winners include:

2016 - Joia Mercurio, Deputy Director

2019 - Kari Morrin, Director of Human Resources

2020 – Sandra Morency, Lead Custodian

2021 – Jessica Scalzi, Lead Nurse

2022 – Nicole Noska, Valley Middle School & Valley Transitional High School Principal

2023 – Matthew Gentile, Director of DDS & MassAbility

2024 – Mazyar Moshtaghi, Chief Technology Officer

The School Spirit Award 2025

Deven Beltran (Valley Transitional High School – Transitional Programming)

Everett V. Olsen, Jr. Award for Highest Academic Honors 2025

Felicite Kodak, (Valley Transitional High School – Alternative Programming)

The Community Partner Award 2025

Billerica Town Hall

Valley Collaborative Retirees

We would like to thank our retirees for their many years of dedication and service to Valley's mission.

Vivi Leighton – 18 Years of service at Valley Elementary School as the Culinary Manager

Christopher Woodward - 5.5 Years of service at Valley Adult Program as Job Placement Specialist

meeting throughout the school year, we recognize students, individuals, and staff of the month who demonstrate Valley's core values. Below please find a comprehensive list of these awards recipients for the 2024 – 2025 school year- congratulations to all!

September 2024

Staff Making a Difference Awards

Technology Department: Mazyar

Moshtaghi & Francisco Laureano

Maintenance/Facilities Department:

Renato Silva, Sandra Morency, Fabio

Agostinho, William G. Hernandez,

Nobelita Bento

October 2024

Valley Elementary School

Student of the Month: Patrick Carrier

Staff of the Month: Noah Colon

Valley Middle School

Student of the Month: Ivy Lefebvre

Staff of the Month: Rajeswari Ravichandran

Valley Transitional High School – Alternative Programming

Student of the Month: Robert Pirnie

Staff of the Month: Brittany Maiuri

Valley Transitional High School – Transitional Programming

Student of the Month: Brandon

Taibe

Staff of the Month: Madison Watford

Valley Adult Services

DDS/MRC Adult Program Participant:

Jennifer Glidden

Staff of the Month: Rebecca Thibodeau

Valley Collaborative – District Wide

Staff of the Month: Kari Morrin

December 2024

Valley Elementary School

Student of the Month: Lindsey

Lavanga

Staff of the Month: Erin Frazier

Valley Middle School

Student of the Month: Dinitri Scott

Staff of the Month: Kali Rowe

Valley Transitional High School – Alternative Programming

Student of the Month: Tyler Marchand

Staff of the Month: Jake Smith

Valley Transitional High School – Transitional Programming

Student of the Month: Jack Murphy

Staff of the Month: Haley Parker

Valley Adult Services

DDS/MRC Adult Program Participant:

Sharifah Namigadde

DDS Staff of the Month: Simeon

Zorokong

MRC Staff of the Month: Dayse

Doliver

Valley Collaborative – District Wide

Staff of the Month: Joia Mercurio, Nicole Noska, Nick LeClair, Heather Mackay, Kathleen Diaz, Donna Driscoll

January 2025

Valley Elementary School

Student of the Month: Ethan Leonardo

Staff of the Month: Katelyn Rose

Valley Alternative Programming High School

Student of the Month: Felicite Kodak

Staff of the Month: Katharine Werner

Valley Transitional Programming Middle School

Student of the Month: Gabriella Rattanavong

Staff of the Month: Faithe Shatford

Valley Transitional Programming High School

Student of the Month: Luke Murphy

Staff of the Month: Leslie Ayers

**continued on next page*

VALLEY COLLABORATIVE

At Valley, We Love What We Do!

**continued from previous page*

Valley Adult Services

Individual of the month: Jenna Boudrot
Staff of the Month: Maureen Lydon

April 2025

Valley Elementary School

Student of the Month: Brody Romano
Staff of the Month: Rebecca Valcanas

Valley Middle School

Student of the Month: Rose Morin
Staff of the Month: Jaclyn Squeglia

Valley Transitional High School – Alternative Programming

Student of the Month: Madison Murray
Staff of the Month: Christine Brennick

Valley Transitional High School – Transitional Programming

Student of the Month: Sean McCarthy
Staff of the Month: Molly Doctor

Valley Adult Services

DDS/MRC Adult Program Participant: Rose Chen
Staff of the Month: Romario Honorat

Valley Collaborative – District Wide

Staff of the Month: Ian MacAulay, Fabio Agostinho, Sandra Morency, Francisco Laureano, Matthew Gentile, Holly Tierney, Benjamin Morrison, Maureen Lydon, Jessica Marcotte

June 2025

Valley Elementary School

Student of the Month: Michael Sheehan
Staff of the Month: Nicole Rosa, Kathryn Richard, Renee Christian
Student of the Year: Louis Lourino

Valley Alternative Programming High School

Student of the Month: Phillip D. Hoffman IV
Staff of the Month: Vlad Stoicescu

Valley Transitional Programming Middle School

Student of the Month: Lexi Fuentes
Staff of the Month: Joanna Bazzinotti

Valley Transitional Programming High School

Student of the Month: Brittany Dorney
Staff of the Month: Scott Morin

Valley Adult Services

Individual of the Month: Jeremy Cyr
Staff of the Month: Ashlee Hamel

We are finalizing Valley's 2026-2031 District Improvement Plan facilitated by Dr. Lori Likis, Consultant with Creative Coaching. Dr. Lori Likis was the DESE consultant for school improvement planning. Prior to retirement, Dr. Likis was responsible for developing the school and district improvement planning protocols for the Massachusetts Department of Elementary and Secondary Education. Valley was one of the original pilot sites for these protocols a decade ago. Valley was honored when Dr. Likis agreed to come out of retirement to help Valley develop its 2026-2031 five year District Improvement Plan. A great deal of work was accomplished this past school year and we are energized about executing the goals embedded in our new plan.

In order to obtain some baseline data for this five year plan, we surveyed Valley's 38 member Leadership Team and Valley's Member District Special Education Directors.

This feedback along with the recent FY24 surveys for students, staff, and adult services participants gives us a great baseline for the new plan. I proudly share the results with you in this newsletter.

I wish you all a fun filled and safe summer. As you are aware, Valley doors are open 12 months of the year and we are looking forward to kicking off summer school on July 7th – see you then!

My door is always open,



Chris A. Scott, Ph. D.
Executive Director

A special thank you to all of our charitable donors

\$5000.00 - Enterprise Bank, Mr. George Duncan Chairman
\$2000.00 - The Torrice Family Charitable Trust
\$1500.00 - Charities Aid Foundations of America
\$500.00 - Powell Controls Inc
\$500.00 - Fritz Deguglielmo, LLC
\$300.00 - Marathas, Barrow & Weatherhead LLP
\$200.00 - Mary T. Conway
\$100.00 - Dr. Anthony J. Bent
\$100.00 - J.P. O'Connor Hardware, Inc
\$100.00 - Camelia and Florin Rosca
\$25.00 - Chip-In Farm, Inc

In Kind Donations:
Market Basket - \$25.00 Gift Cards (2)

VALLEY COLLABORATIVE

Discussion of Status of Valley's Culture

Discussion of Status of Valley's Culture

Administrative Leadership
2024/2025 SY



1. What do you SEE in Valley's culture?

29 responses



2. What do you FEEL about Valley's culture?

38 responses



3. What do others SAY about Valley?

37 responses



VALLEY COLLABORATIVE

Member District Special Education Directors Satisfaction Survey

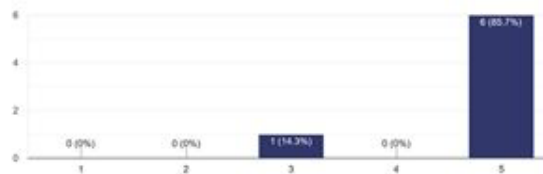
Member District Special Education Directors Satisfaction Survey

2024/2025 SY



1.) How responsive/timely is Valley Collaborative to your questions and concerns?

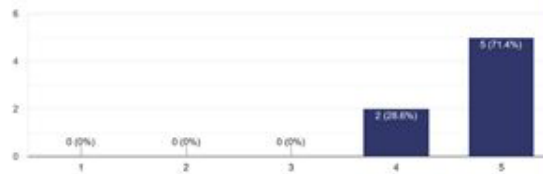
7 responses



Average rating (4.71)

2.) How effectively does Valley Collaborative address your out-of-district needs?

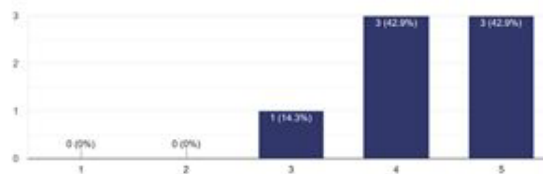
7 responses



Average rating (4.71)

3.) How would you rate your students' growth while attending Valley Collaborative?

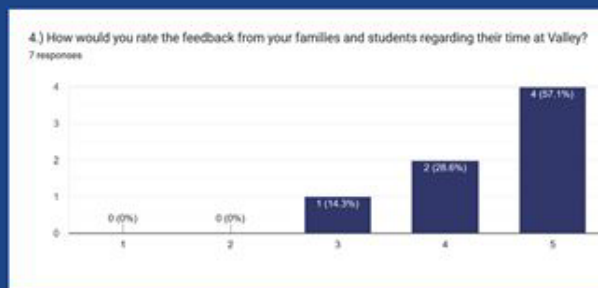
7 responses



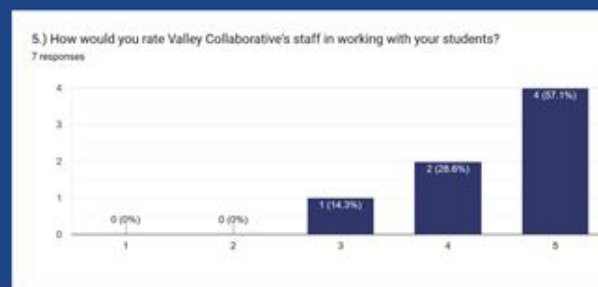
Average rating (4.29)

VALLEY COLLABORATIVE

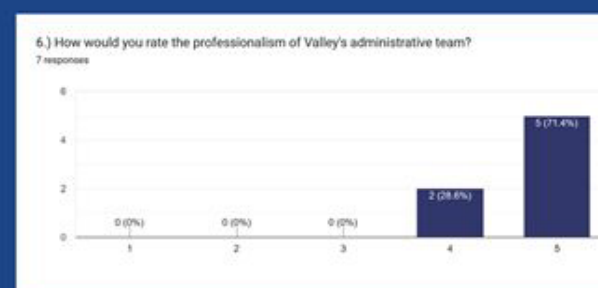
Member District Special Education Directors Satisfaction Survey



Average rating (4.43)



Average rating (4.43)



Average rating (4.71)



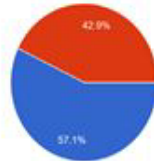
Average rating (4.86)

VALLEY COLLABORATIVE

Member District Special Education Directors Satisfaction Survey

8.) How does the quality of Valley's programming compare to other out-of-district placements?

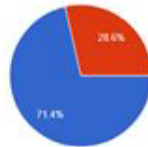
7 responses



- Valley Collaborative offers the highest quality programming
- Valley Collaborative offers good quality programming
- Valley Collaborative programming needs improvement

9.) We understand the continuity of staff is important to building productive professional relationships. How would you compare the retention of Valley Collaborative's administrative team to other out-of-district placement administrative teams?

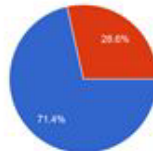
7 responses



- The longevity of Valley Collaborative's administrative team is among the highest retained
- The longevity of Valley Collaborative's administrative team is comparable
- The longevity of Valley Collaborative's administrative team is considerably less

10.) How does Valley's tuition rates compare to other out-of-district placements?

7 responses



- Valley is the most cost effective
- Valley is comparable
- Valley is the most expensive

Please share any other feedback you would like Valley Collaborative to consider.

1 response

My experience with referrals at the elementary school is usually met with a need for a 1:1 even when the student does not have on their grid-I realize the students we are referring have behavioral needs-my concern is attaching the 1:1 so quickly into the process and then getting it out of the IEP months later proves to be a challenge as parents invoke and the removal of the service is a challenge. Not an easy answer just worth considering...thx

Valley Collaborative Leadership Team



Chris A. Scott, PhD

Executive Director,
Finance and Operations
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Chief Technology Officer
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Matthew Gentile

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Heather Mackay

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Joia Mercurio

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Nick LeClair

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Renato Silva

School Safety & Facilities
Manager
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Kari Morrin

Director of HR, Title IX and
504 Coordinator
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Nicole Noska

Principal, Valley Middle School
Valley Transitional High School
Transitional Programming
nnoska@valleycollaborative.org

Valley Collaborative Board



Dr. Jay Lang, chair

Superintendent, Chelmsford
Public Schools



Dr. Geoff Bruno

Superintendent, Groton-
Dunstable Regional School
District



**Ms. Brenda
Theriault-Regan**

Superintendent, Tewksbury
Public Schools



Dr. Kerry Clery

Superintendent, Billerica Public
Schools



Dr. Denise Pigeon

Superintendent, Nashoba Valley
Technical School District



Dr. Michael Flanagan

Superintendent,
Tyngsborough Public Schools



Mr. Steven Stone

Superintendent, Dracut Public
Schools



Mr. Brad Morgan

Superintendent, North
Middlesex Regional School
District



**Dr. Christopher
Chew**

Superintendent, Westford Public
Schools

Valley Collaborative partners with families, districts, and the community to provide innovative programming that empowers all students and adults to discover their diverse individual strengths, interests, and abilities. In doing so, those we serve become self-actualized members of society who contribute in a responsible manner.

**VALLEY COLLABORATIVE
TREASURER'S REPORT
MAY 31, 2025**

		<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	\$ 4,539,987.34	\$ 1,439,193.13		\$ (239,505.01)		\$ (1,316,000.00)	\$ 4,423,675.46
Payroll	a/c 795823	\$ 192,033.96		\$ (1,410,004.61)			\$ 1,320,000.00	\$ 102,029.35
Joe's Bistro	a/c 531401	\$ 4,323.92	\$ 1,608.25				\$ (4,000.00)	\$ 1,932.17
ICS MMDA	a/c 856490	\$ 4,774.85				\$ 2.02		\$ 4,776.87
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>\$ 6,241,234.43</u>	<u>\$ 1,440,801.38</u>	<u>\$ (1,410,004.61)</u>	<u>\$ (239,505.01)</u>	<u>\$ 2.02</u>	<u>\$ -</u>	<u>\$ 6,032,528.21</u>
 MMDT	a/c 0044263747	<u>\$ 1,148,388.73</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,366.67</u>	<u>\$ -</u>	<u>\$ 1,152,755.40</u>
 Total Unrestricted Cash		<u>\$ 7,389,623.16</u>	<u>\$ 1,440,801.38</u>	<u>\$ (1,410,004.61)</u>	<u>\$ (239,505.01)</u>	<u>\$ 4,368.69</u>	<u>\$ -</u>	<u>\$ 7,185,283.61</u>
 PARS OPEB Trust		<u>\$ 7,782,791.87</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (2,087.71)</u>	<u>\$ 243,309.21</u>	<u>\$ -</u>	<u>\$ 8,024,013.37</u>
 TOTAL CASH		<u>\$ 15,172,415.03</u>	<u>\$ 1,440,801.38</u>	<u>\$ (1,410,004.61)</u>	<u>\$ (241,592.72)</u>	<u>\$ 247,677.90</u>	<u>\$ -</u>	<u>\$ 15,209,296.98</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JUNE 30, 2025**

		<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	\$ 4,423,675.46	\$ 2,911,488.21		\$ (169,567.18)		\$ (2,750,000.00)	\$ 4,415,596.49
Payroll	a/c 795823	\$ 102,029.35		\$ (2,046,719.96)			\$ 2,750,000.00	\$ 805,309.39
Joe's Bistro	a/c 531401	\$ 1,932.17	\$ 2,109.98					\$ 4,042.15
ICS MMDA	a/c 856490	\$ 4,776.87				\$ 1.96		\$ 4,778.83
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>\$ 6,032,528.21</u>	<u>\$ 2,913,598.19</u>	<u>\$ (2,046,719.96)</u>	<u>\$ (169,567.18)</u>	<u>\$ 1.96</u>	<u>\$ -</u>	<u>\$ 6,729,841.22</u>
 MMDT	a/c 0044263747	<u>\$ 1,152,755.40</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,225.02</u>	<u>\$ -</u>	<u>\$ 1,156,980.42</u>
 Total Unrestricted Cash		<u>\$ 7,185,283.61</u>	<u>\$ 2,913,598.19</u>	<u>\$ (2,046,719.96)</u>	<u>\$ (169,567.18)</u>	<u>\$ 4,226.98</u>	<u>\$ -</u>	<u>\$ 7,886,821.64</u>
 PARS OPEB Trust		<u>\$ 8,024,013.37</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ (2,147.58)</u>	<u>\$ 260,918.31</u>	<u>\$ -</u>	<u>\$ 8,282,784.10</u>
 TOTAL CASH		<u>\$ 15,209,296.98</u>	<u>\$ 2,913,598.19</u>	<u>\$ (2,046,719.96)</u>	<u>\$ (171,714.76)</u>	<u>\$ 265,145.29</u>	<u>\$ -</u>	<u>\$ 16,169,605.74</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
JULY 31, 2025**

		<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	\$ 4,415,596.49	\$ 2,654,686.92		\$ (874,300.34)		\$ (1,370,000.00)	\$ 4,825,983.07
Payroll	a/c 795823	\$ 805,309.39		\$ (1,946,122.10)			\$ 1,370,000.00	\$ 229,187.29
Joe's Bistro	a/c 531401	\$ 4,042.15	\$ 1,648.00					\$ 5,690.15
ICS MMDA	a/c 856490	\$ 4,778.83				\$ 2.02		\$ 4,780.85
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>\$ 6,729,841.22</u>	<u>\$ 2,656,334.92</u>	<u>\$ (1,946,122.10)</u>	<u>\$ (874,300.34)</u>	<u>\$ 2.02</u>	<u>\$ -</u>	<u>\$ 6,565,755.72</u>
 MMDT	 a/c 0044263747	 <u>\$ 1,156,980.42</u>	 <u>\$ -</u>	 <u>\$ -</u>	 <u>\$ -</u>	 <u>\$ 4,381.53</u>	 <u>\$ -</u>	 <u>\$ 1,161,361.95</u>
 Total Unrestricted Cash		 <u>\$ 7,886,821.64</u>	 <u>\$ 2,656,334.92</u>	 <u>\$ (1,946,122.10)</u>	 <u>\$ (874,300.34)</u>	 <u>\$ 4,383.55</u>	 <u>\$ -</u>	 <u>\$ 7,727,117.67</u>
 PARS OPEB Trust		 <u>\$ 8,282,784.10</u>	 <u>\$ -</u>	 <u>\$ -</u>	 <u>\$ (2,206.31)</u>	 <u>\$ 49,076.86</u>	 <u>\$ -</u>	 <u>\$ 8,329,654.65</u>
 TOTAL CASH		 <u>\$ 16,169,605.74</u>	 <u>\$ 2,656,334.92</u>	 <u>\$ (1,946,122.10)</u>	 <u>\$ (876,506.65)</u>	 <u>\$ 53,460.41</u>	 <u>\$ -</u>	 <u>\$ 16,056,772.32</u>

**VALLEY COLLABORATIVE
TREASURER'S REPORT
AUGUST 31, 2025**

		<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	\$ 4,825,983.07	\$ 678,601.71		\$ (483,059.43)		\$ (1,395,000.00)	\$ 3,626,525.35	
Payroll	a/c 795823	\$ 229,187.29		\$ (1,449,728.97)			\$ 1,400,000.00	\$ 179,458.32	
Joe's Bistro	a/c 531401	\$ 5,690.15	\$ 949.66				\$ (5,000.00)	\$ 1,639.81	
ICS MMDA	a/c 856490	\$ 4,780.85				\$ 2.02		\$ 4,782.87	
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>\$ 6,565,755.72</u>	<u>\$ 679,551.37</u>	<u>\$ (1,449,728.97)</u>	<u>\$ (483,059.43)</u>	<u>\$ 2.02</u>	<u>\$ -</u>	<u>\$ 5,312,520.71</u>	
MMDT	a/c 0044263747	\$ 1,161,361.95	\$ -	\$ -	\$ -	\$ 4,393.34	\$ -	\$ 1,165,755.29	
Total Unrestricted Cash		<u>\$ 7,727,117.67</u>	<u>\$ 679,551.37</u>	<u>\$ (1,449,728.97)</u>	<u>\$ (483,059.43)</u>	<u>\$ 4,395.36</u>	<u>\$ -</u>	<u>\$ 6,478,276.00</u>	
PARS OPEB Trust		\$ 8,329,654.65	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,329,654.65	as of July 31, 2025
TOTAL CASH		<u>\$ 16,056,772.32</u>	<u>\$ 679,551.37</u>	<u>\$ (1,449,728.97)</u>	<u>\$ (483,059.43)</u>	<u>\$ 4,395.36</u>	<u>\$ -</u>	<u>\$ 14,807,930.65</u>	

Valley Collaborative
Interim Statement of Revenues, Expenses and Changes in Net Assets
For the Period Ending June 30, 2025
210 of 210 (100%) School Days

UNAUDITED		
	AMENDED BUDGET	ACTUAL
REVENUES		
Services	\$ 22,045,706	\$ 22,197,833
State Contracts	4,500,000	4,483,224
Other	649,609	692,920
Interest	55,000	54,508
Total Revenues	27,250,315	27,428,485 101%
EXPENSES		
Salaries	18,094,418	18,016,511
Employee Benefits	3,425,027	3,251,631
Operating Expenses	2,615,800	2,978,119
Leases & Rentals	593,247	608,161
Depreciation	751,000	909,123
Total Expenses	25,479,492	25,763,545 101%
Change in Net Assets - Operating	\$ 1,770,823	\$ 1,664,940
Non Operating Activities		
Return to Member Districts	-	-
Non-Operating Expenses (1)	(1,000,000)	-
Change in Net Assets	\$ 770,823	\$ 1,664,940

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

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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

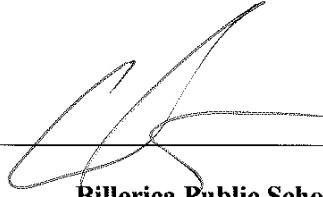
Non-Discrimination

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

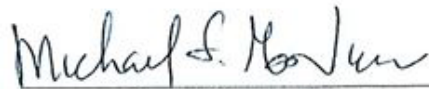
Date



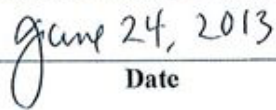
**Chelmsford Public Schools
School Committee Chairperson**

19 December '13

Date

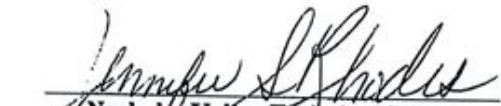
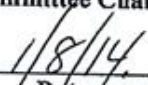


**Dracut Public Schools
School Committee Chairperson**



Date

Alison J. Hamigan
Groton-Dunstable Regional School District
School Committee Chairperson
November 22, 2013
Date

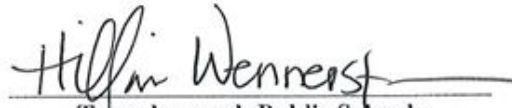

Nashoba Valley Technical School
School Committee Chairperson

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



2025 - 2026 Academic Calendar

July 2025						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
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27	28	29	30	31		

August 2025						
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September 2025						
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28	29	30				

October 2025						
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November 2025						
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23/30	24	25	26	27	28	29

December 2025						
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January 2026						
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February 2026						
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March 2026						
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29	30	31				

April 2026						
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May 2026						
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24/31	25	26	27	28	29	30

June 2026						
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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

Center for Educational Options Education Collaborative Team

June 2025

Gratitude

As the school year winds down, we want to extend our gratitude and admiration for your unwavering dedication and tireless efforts supporting your students, families, colleagues, and communities. You have navigated another year with resilience, creativity, and a profound commitment to students.



Now as the summer months approach, we encourage you to prioritize rest and rejuvenation. While we hope you can reflect on all you have accomplished, we really encourage you to take time to recharge, pursue some personal interests, and spend time with loved ones. Remember, your well-being is important; a well-rested educator is an even more effective educator! 😊

However, we know that even during the summer, your mind might drift to plans for the next academic year. If that is the case, please know that we believe in the power of education collaboratives as part of the public education landscape in Massachusetts and are here to support you. In addition, we look forward to welcoming Commissioner Pedro Martinez in July and hope you share our excitement about the opportunities ahead.

We thank you for your continued dedication to the students and families of the Commonwealth, and we wish you all the best!

Ruth and Paulajo

Updates

Online Board Member Training

The online board member training is expected to be available in early July. Please continue to update your collaborative membership lists so that when the system is launched for the board members, their information will be current. We thank you for your patience.

Revised Annual Audit and Annual Report Guidelines

Watch the [DESE education collaborative webpages](#) for these updates:

- FY25 Annual Independent Audit Guidelines
- FY25 Annual Report Guidelines

Resources

General

- [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](#)



Center for Educational Options Education Collaborative Team

June Bulletin 2025

- [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.

Supporting Transgender & Nonbinary Youth: Supporting Transgender & Nonbinary Youth Toolkit Implementation Sessions: The Massachusetts Transgender Political Coalition (MTPC) is excited to announce the Supporting Transgender & Nonbinary Youth Toolkit. This digital resource will be free and accessible in early June 2025 and accompanied by implementation training sessions. The purpose of this toolkit is to ensure the safety, well-being, and lived equity of all transgender, nonbinary, and gender diverse children and young people in Massachusetts and beyond. The document outlines guidelines and considerations for adult supporters and professionals who serve, educate, and care for trans youth. This toolkit is ideal for:

- Staff and leaders in youth programming, community centers, and support services
- Teachers and school-based staff
- Therapists, counselors, and social workers
- Clinicians and health providers
- Faith leaders
- Parents, caregivers, and adult supporters of young people

Join MTPC for a 90-minute virtual webinar this June to review and implement guidance, strategies, and information for supporters of transgender, nonbinary, and gender-diverse young people.

Register now at www.masstpc.org/training:

- Thursday, June 26, 2025, from 9:30 am to 11:00 am

A flyer is [attached](#) that can be shared with colleagues and community members. MTPC asks that you do not share information regarding the implementation training sessions on social media. Be the first to access the Supporting Transgender & Nonbinary Youth Toolkit by signing up for MTPC's newsletter: www.masstpc.org/receive-updates/

Know Your Rights Guide About Immigration Action:

The Attorney General's Office has [issued a Know Your Rights guide for immigrants](#), families, and communities about federal Immigration and Customs Enforcement (ICE). The guide outlines the rights of the individual being arrested/detained and the rights of bystanders. [The guide](#) also includes a link to previously issued [guidance for K-12 schools on protecting students and their information](#). The Attorney General's Office is in the process of having the Know Your Rights Guide translated. Please review the guide and share it with your staff and families.

In addition, the [slides from the Know Your Students' Rights webinar](#) that the state Office for Refugees and Immigrants and the Attorney General's Office held for superintendents in January remain available for download on DESE's website.

Center for Educational Options Education Collaborative Team
June Bulletin 2025

Reminders

DESE Restraint Reporting

All districts, **collaboratives**, charter schools, and approved special education schools are required to use the Restraint Application Tool in [DESE's Security Portal](#) to report any physical restraints and related injuries to students and staff that occur during the school day, per [603 CMR 46.00 Prevention of Physical Restraint and Requirements if Used](#). Those same entities must also certify restraint data at the end of the school year.

The 2024-25 school year restraint data collection will close at **5:00 p.m. on Friday, June 27**, and all districts, collaboratives, charter schools, and special education schools must certify their restraint data (**even if there were no restraints**) by that time. Anyone with questions about this data collection is asked to email restraint@doe.mass.edu.

Provide Board of Director Meeting Schedules for 2025-26 and:

- hold at least 6 (six) board meetings;
- post the 2025-26 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; 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

Massachusetts Organization of Educational Collaboratives



Dear Participants in MOEC Financial Leadership Academy,

I hope your school year is off to a great start! And thank you for registering for the MOEC Financial Leadership Academy. This Academy is designed to enhance the knowledge and skill of leaders about finance issues that are unique to collaboratives compared to districts or municipalities. You will learn about practices that will enhance your leadership skills and strengthen your understanding of Collaborative Finance. This will also promote communication within your organization as you learn more about these topics.

Dates and topics are listed in the table below but are subject to change. Through a combination of presentations and group discussions, participants will engage in collaborative inquiry and capacity building. They will incorporate work with colleagues in this cohort to conduct analyses of problems of practice for their own Collaborative and share practices with colleagues.

MOEC Leadership Financial Academy		
Session	Date	Tentative Topics by Date
1	Sep. 30th 9:00 - 3:00	Effective Budgeting and Financial Management Consistent and Stable Revenue Stream Sufficient and Diverse Funding Sources
2	Oct. 28th 9:00 - 3:00	Compliance with Legal and Regulatory Requirements Supporting the Business Office Team
3	Nov. 18th 9:00 - 3:00	Adequate Facilities Problems of Practice

Presenters:

This Financial Leadership Academy provides a unique opportunity to learn from a variety of experienced Executive Directors and Business Managers who will be sharing aspects of Collaborative Leadership with you. There will also be many opportunities to learn from each other as we recognize the value that comes from sharing your experiences.

Our presenters include: Chris Scott, Executive Director Valley Collaborative; Susan Farrell, Executive Director, Central Mass Collaborative; Catherine Cooper Executive Director, Southeastern Mass Educational Collaborative; Chris Haraden, Business Manager, Southeastern Mass Educational Collaborative; and various other presenters.

Location and Parking

Our sessions will be hosted at **Assabet Valley Educational Collaborative at 28 Lord Rd, Marlborough, MA 01752, Suite 125**. The entrance to Suite 125 is on the first floor to the right of the main walkway into the building.

Parking is located in the front, back and along one side of the building. Visitors are welcome to park in any open parking spot. Please be aware there are a few designated spots (with signage) for a neighboring business (JS Flemming). We ask visitors to avoid parking in spots with those designated signs. If you park in the back of the building, you will be entering on the second floor. Please take the stairs or elevator to the first floor. AVC is located in Suite 125.

Preparation:

For each session, participants are encouraged to come prepared with artifacts from your collaborative including data, policies and processes/procedures about how your collaborative addresses the topics of the day. We will use these in discussions with collaborative colleagues.

For the first session, please consider bringing data, policies, and processes used at your collaborative for Effective Budgeting and Financial Management as well as for Consistent, Stable, and Diverse Revenue Streams. For example, among other things, you bring information about how you project revenue and enrollment, or ideas about the diverse ways your collaborative generates revenue.

Accommodations

Continental Breakfast and Lunch are included in your registration. If you wish to discuss a need for reasonable accommodations or any dietary restrictions for this Academy, please contact me so we have time to prepare.

Contact

I will serve as the contact person for overarching or logistical questions about the course that you may have, so feel free to contact me at any time and I will respond as quickly as I can. I look forward to meeting those of you whom I have not met at our first session on September 30th.

My best,

Joanne Haley Sullivan

Joanne Haley Sullivan, MOEC Executive Director

jhaleysullivan@moeenet.org

617-291-5586

From: [Joanne Haley-Sullivan](#)
To: [Pam Girouard](#); [Arnold Lundwall](#); [Fran Rosenberg/NEC](#); [Chris Scott](#); [Cathy Lawson](#); [Catherine Cooper](#); [Dympna Thomas](#); [Robert Jokela](#); [Emily Parks](#)
Cc: [Susan Farrell](#)
Subject: [EXTERNAL] Financial Leadership Academy--seeking your help
Date: Monday, July 14, 2025 3:47:21 PM

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

Hello everyone,

I hope your summer is off to a good start.

I am writing today to let you know that Chris Scott and Susan Farrell have stepped forward to take the lead in our Leadership Academy program for the Fall.

We/they are hoping that some of you will be willing to join them in the presentations. They will take responsibility for the overall day, but would like more voices to be part of this to make it a richer experience for the participants.

Will you please review this [list](#) and let us know if there is one or more of the topics or subtopics that you or your business manager would feel comfortable leading? Some topics might only require 20-30 minutes, some are part of a panel presentation, and others might need more depth. We can determine all of that once we know more about who might be willing to present. For example, maybe you wouldn't feel comfortable leading about all of the compliance and regulatory requirements, but you could present on the subtopic of procurement. Maybe you don't feel comfortable talking about Facilities in general, but could talk about programs in district classrooms; etc. If there is a topic you would be willing to lead, but have questions, please feel free to let me know and we can talk it over.

Please give this some consideration and let me know your thoughts. The dates are on the flyer, the location will be determined once we see who is registered and where they will be coming from.

On another note, we are still seeking someone to coordinate the Academy. I am attaching the posting [here](#). Please give it some consideration.

It takes a village!

Joanne

Joanne Haley Sullivan, Executive Director
Massachusetts Organization of Educational Collaboratives

From: Vivi Leighton <vleighton@valleycollaborative.org>

Date: June 12, 2025 at 12:50:12 PM EDT

To: Chris Scott <cscott@valleycollaborative.org>

Subject: thank you

Dear Chris

Thank you for your kind words today. I'm not comfortable with speaking in public.

What I would like to say is I appreciate the confidence you have always had in me.

I love what I do and I love the students big and small. My years with the vocational high school was just as much a learning experience for me as it was for the students I worked with I enjoyed all of it. The move to the elementary school was a little scary at first but it all worked out for the best.

I want to say thank you for allowing me to share what I know with other team members ,it was a bumpy ride this last year trying to fit the right people in and I believe you succeeded. Chris, Tim and Craig are good people and are a pleasure to work with. I'm proud to leave my kitchen in Christina's hands.

Finally ,keep showing staff the value you see in them it goes a long way.

I will miss Valley

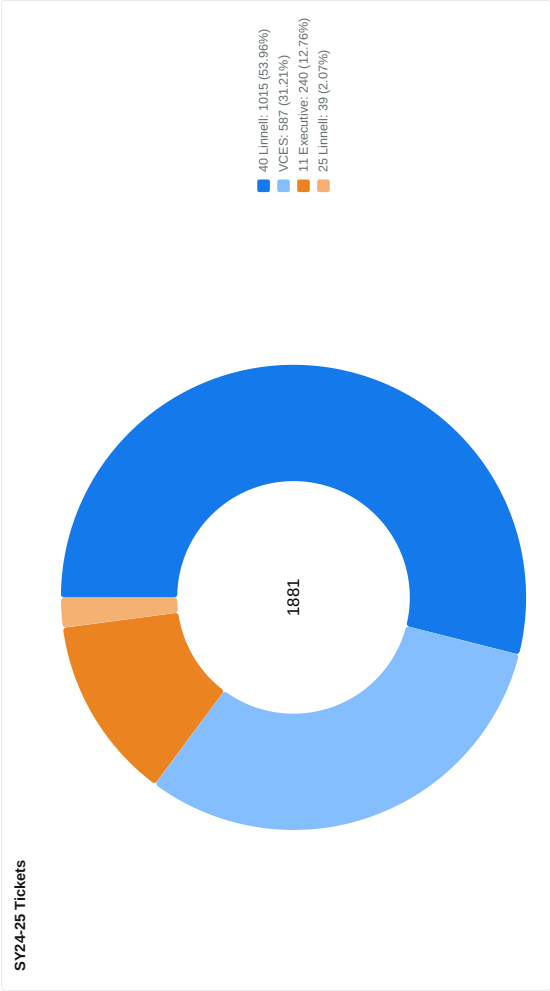
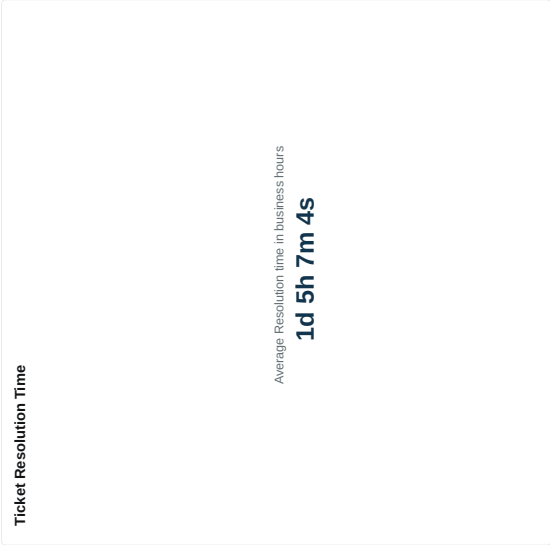
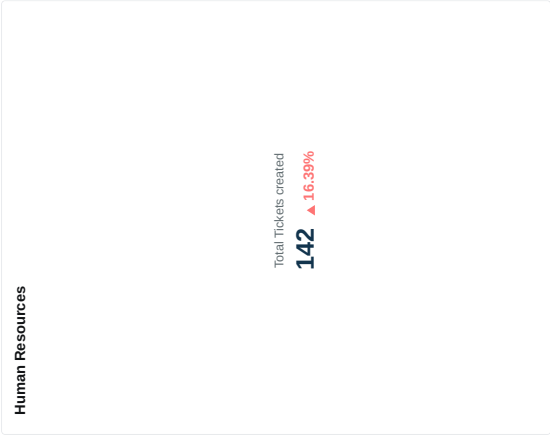
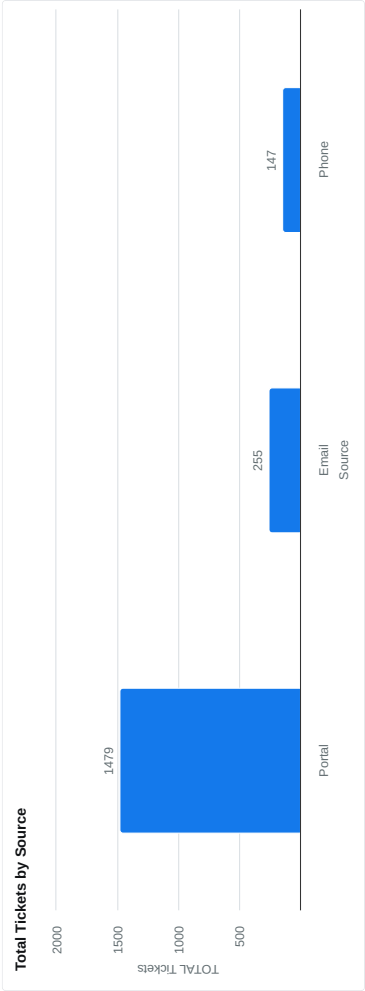
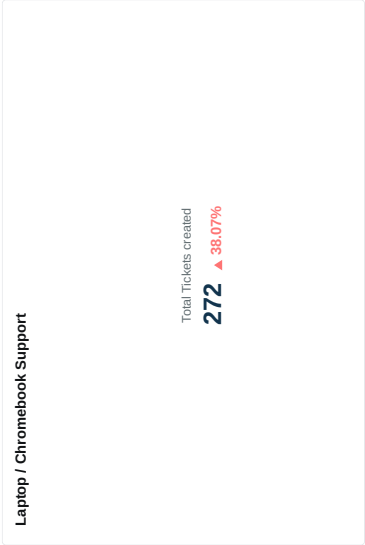
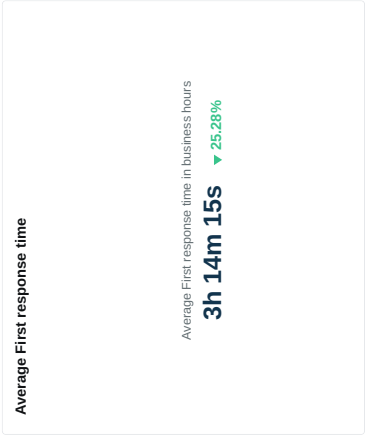
Sincerely,Vivi

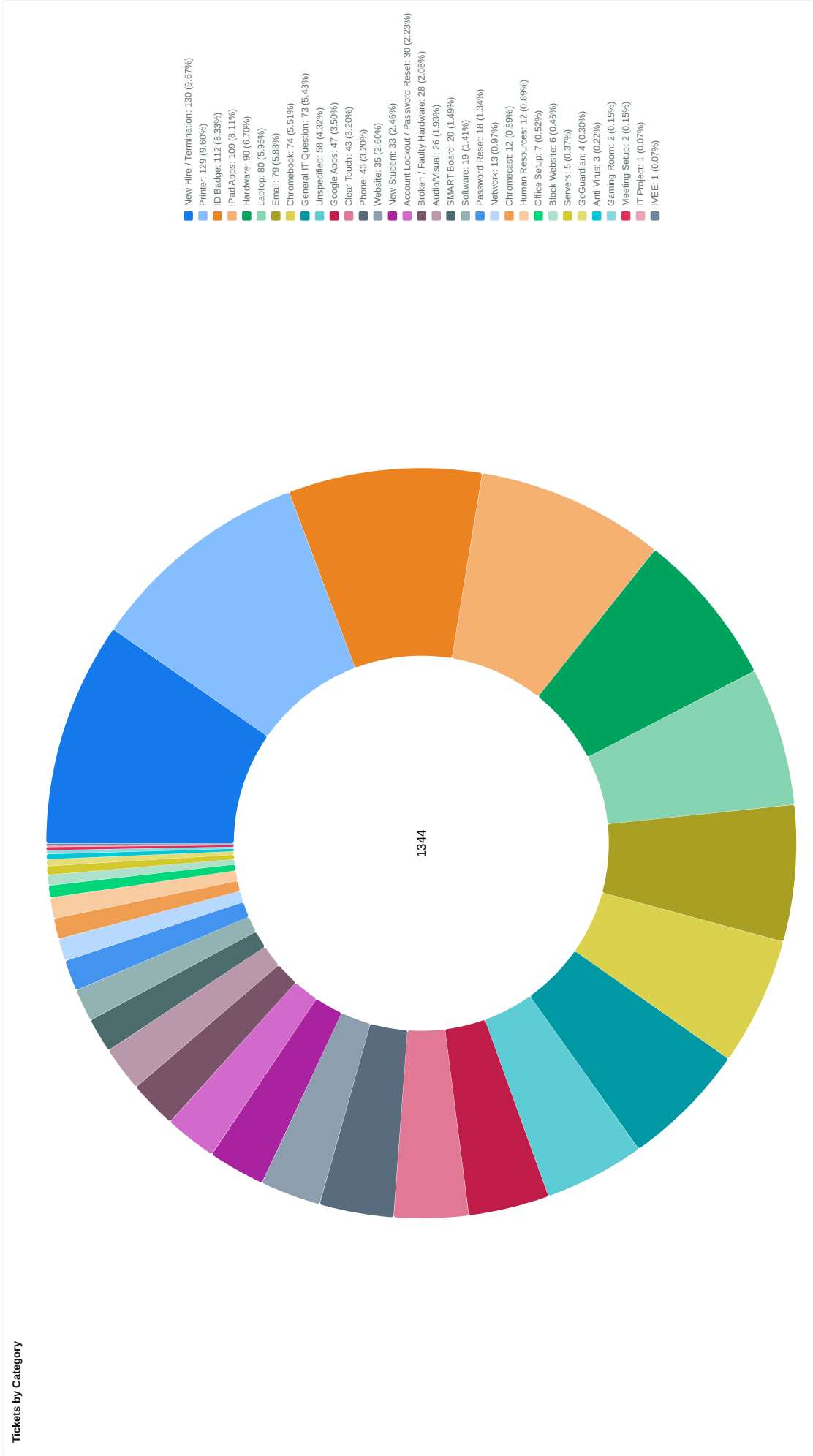
SY24-25

Generated Date: June 27, 2025

Date Range: in the last 90 Days

Technology Department at a glance





From: [Roy W. Frost](#)
To: [Chris Scott](#)
Subject: [EXTERNAL] Thank you
Date: Monday, September 8, 2025 8:32:25 AM

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

Chris

Thank you so much for the mug and socks (and the signed MOU). I really appreciate it and will fondly think of you whenever I enjoy a coffee! You're so thoughtful.

Best

Roy

Roy W. Frost

Chief of Police

Billerica Police Department

6 Good St

Billerica, MA 01821

Direct Phone: 978-215-9653 Agency Phone: 978-671-0900 Fax: 978-667-3252

Website: <https://police.billericaps.com>

This message contains information which may be confidential and privileged. Unless you are the addressee (or authorized to receive for the addressee), you may not use, copy or disclose to anyone the message or any information contained in the message. If you have received the message in error, please advise the sender by reply e-mail, and delete or destroy the message. Thank You.

Chief Roy W Frost

Billerica Police Department

978-215-9652



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 Scott, Executive Director
Joe Venskus, Community Engagement Specialist & Chrystalia Metrakas, Assistant Principal
Date: June 12, 2025
Re: Fundraiser Update – Montreal Trip

On May 12, 2025, thirty Valley travelers hopped on a bus and started our 11th annual adventure to Montreal, Canada. It was a great cultural experience that had all of our travelers interested in what we would see. We spent the week learning about the city's history. We explored the Pointe-a-Calliere, the Archaeological Museum, St. Patrick's church, the Notre Dame Basilica, Montreal's Science Centre, Graffiti Art, Bio Dome, Rio Tino Planetarium and was able to get a tour of the famous Montreal Canadian Bell Centre and locker room. The Sugar Shack or La Sucrierie de la Montagne was another great way to immerse ourselves in French Canadian Culture. We learned how maple syrup is made and enjoyed French Canadian folk music and traditional cuisine. Everyone enjoyed and participated in traditional French Canadian music and were given a lesson on playing wooden spoons during song. The Valley travelers enjoyed a great historical and cultural experience that we will never forget!

A special thank you to all of our charitable donors:

\$5000.00 - Enterprise Bank, Mr. George Duncan Chairman
\$2000.00 - The Torrice Family Charitable Trust
\$1500.00 - Charities Aid Foundations of America
\$500.00 - Powell Controls Inc
\$500.00 - Fritz Deguglielmo, LLC
\$300.00 - Marathas, Barrow & Weatherhead LLP
\$200.00 - Mary T. Conway
\$100.00 – Dr. Anthony J. Bent
\$100.00 - J.P. O'Connor Hardware, Inc
\$100.00 - Camelia and Florin Rosca
\$25.00 - Chip-In Farm, Inc

Required Action:

- None

Attachments:

- None

