



AGENDA and NOTICE SCHOOL COMMITTEE MEETING

This is a remote meeting, with public comment available via the meeting link.

Regular Session Meeting
Monday, January 26, 2026

LOCATION

Remote Location

Dial In: 1 301 725 8592 - Webinar ID: 871 2146 6606

URL: <https://us02web.zoom.us/j/87121466606>

AGENDA

7:00 p.m. Open Regular Session

(Approximate Time)

1. Public Comment 15 Mins
 - a. At the start of each regularly scheduled School Committee meeting, community members may address the Committee. Remote attendees on Zoom should use the "Raise Hand" feature (in the Reactions menu, or under "More" on mobile) and must type their full name into the Zoom name field to be called on. Per Policy BEDH, each speaker has up to three (3) minutes and must state their name and city/town. Public comment is not a discussion or debate, but an opportunity to share opinions on matters within the Committee's authority. Meetings are live-streamed and recorded for SudburyTV; participation constitutes consent to be recorded and broadcast.

2. Special Matters 55 Mins
 - a. 2025-2026 School Committee Goal: Digital Citizenship, Current Practices, Framework (Discussion) Alignment and Policy Implementation (Michael O'Brien, Liz Kerrigan and Shannon Famigletti) 55 Mins

3. Consent Calendar (Discussion/Action) 5 Mins
 - a. CASE Collaborative Q2 Report
 - b. ACCEPT Collaborative Q2 Report
 - c. Policy Subcommittee Meeting Minutes (01/16/2026)
 - d. Sudbury Public Schools Town Report (2025)
 - e. Monthly Accounts Payable and Payroll Warrant Submissions
 - f. Minutes (12/08/25, 12/09/25 and 12/15/25)
 - g. **January At-A-Glance Newsletter and Community Email**
 - h. **Update copy for School Committee Website Regarding Public Comment**

4. Business and Policy Matters 20 Mins
 - a. Discussion on how the Sudbury School Committee and Sudbury Public Schools may partner with the Sudbury 250 Committee in their efforts to honor the 250th Anniversary of the Commencement of the American Revolution (Discussion/Action) 20 Mins
 - b. Superintendent Update and Discussion Regarding Summer Programming (Discussion/Action) 15 Mins
 - c. Initial Discussion Regarding Community Feedback on Antisemitism and Racism, And Next Steps (Discussion/Action) 15 Mins
 - District Update: Antisemitic and Racial Incidents — 2025–2026 School Year
 - d. Vote on Superintendent's Recommended Annual Town Meeting Warrant Articles (Discussion/Action) 15 Mins
 - e. Policy BDB: Step 2: Review, Discussion, and Potential Vote for Counsel Review (Discussion/Action) 20 Mins
 - i. New - BDFC, Parent Advisory Councils, ELPAC
 - ii. New - IJNDG Generative Artificial Intelligence Policy for Teachers and Students
 - iii. AD, Mission Statement
 - iv. CBI, Evaluation of the Superintendent
 - f. Discussion and Potential Vote on the FY27 Budget Book (Discussion/Action) 25 Mins

"This listing of matters is those reasonably anticipated by the Chair, which may be discussed at the meeting. Not all items listed may in fact be discussed, and other items not listed may also be brought up for discussion to the extent permitted by law. The Chair will strive to honor timed items as best as possible."

The next School Committee Meeting is scheduled for **Monday, February 9, 2026**

**Sudbury Public Schools
School Committee Meeting**

Date: January 26, 2026

Agenda Item: 2a

Digital Citizenship, Current Practices, Framework Alignment and Policy Implementation (Michael O'Brien, Liz Klerrigan and Shannon Famigletti)

Recommendation:

Background Information:

Attachments:

SPS Instructional Technology SC Presentation

Action:

Report:

Discussion:

XX

Digital Resources and Instructional Technology

January 26, 2026



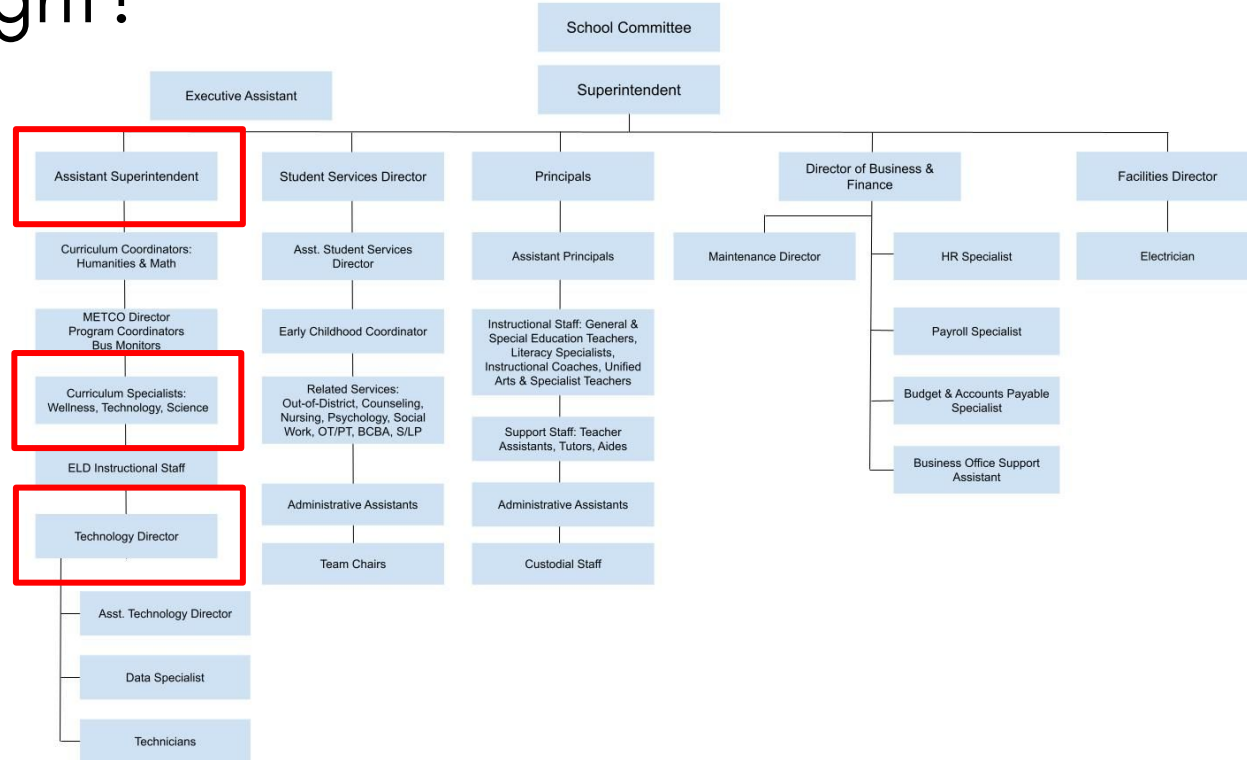
Who is here tonight?

Annette Doyle
Assistant Superintendent

Michael O'Brien
Director of Technology

Shannon Famigletti
& Liz Kerrigan
*Instructional Technology
Curriculum Specialists*

Sudbury Public Schools Organizational Chart



Student Safety • Web Filtering



Children's Internet Protection Act (CIPA)



Web Filtering



History Trends Unlimited



YouTube Access - Restricted

Student Safety • Google Workspace



Google Workspace for Education Plus



Managed Environment (Extensions, Google Logins, etc.)



Blocks (Middle School)

Student Safety • Student Data Privacy

[Student Data Privacy Consortium](#) (SDPC)

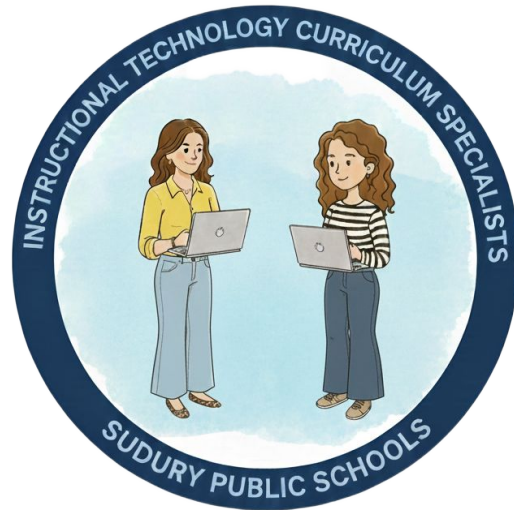
Data Privacy Agreements (DPAs) – every subscription

Username Format

Principle of least data shared for usability

Student Safety • Responsible Behavior

- [Acceptable Use Policy](#)/Annual Back to School Packet
- Behavior Rubrics
- Lights Out Hours
- Recreational Use (Not Permitted)
- Personal Device Policy
- Digital Literacy & Well-Being (More on this later)



Shannon Famigletti & Liz Kerrigan
SPS Instructional Technology Curriculum Specialists

Educational Technology Defined

Digital Literacy & Computer Science Standards

DLCS Standards Connections

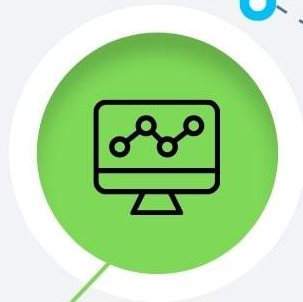
- Production & Distribution of Writing (ELA Standards)
- Social Emotional Learning
- Digital Literacy & Well-Being

Instructional Technology Tools

- Cross Content Connections

WHAT DOES "SCREEN TIME" MEAN FOR K-12 STUDENTS?

Screen Time: A broad (but widely used) term to describe time spent in front of digital media. "Screen time" can refer to the use of televisions, video game consoles, computers, tablets, and any other device that uses a digital screen. The versions of "screen time" that affect K-12 spaces are outlined below.

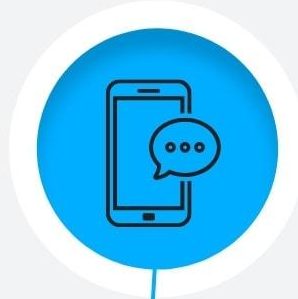


Educational Technology

EdTech (i.e. technology used in the classroom) is designed to support, not replace, high-quality teaching.

These technologies may be used to personalize student learning, drive engagement, build important workforce skills, and give ALL learners access to important content.

K-12 educators are trained to use EdTech with thought and balance as part of their overall structure for teaching and learning.



Cell Phones/Social Media

43% of Tweens (Ages 8-12) and around **90%** of Teens (Ages 13-18) in the United States have their own cell phone. (*Common Sense Media, 2023*)

YouTube, TikTok, Snapchat, and Instagram are the most popular apps for teenagers with smart phones. (*Pew Research Center, 2023*)

Smart phone applications, specifically social media, have an incentive to engage users regularly and for long periods of time.



Entertainment

Platforms that use a screen (video game systems, televisions, desktop computers, etc.) are used by children before they get their first cell phone.

80% of households with children have some form of tablet computer; **64%** of households WITHOUT children have a tablet computer (*U.S. Census Bureau, 2021*)

Much like EdTech, screen-based entertainment can be positive and relaxing if it is used thoughtfully and with **balance**.

MA Digital Literacy & Computer Science Standards (DLCS)



Vision

Digital literacy and computer science knowledge, reasoning, and skills are essential both to prepare students for personal and civic efficacy in the twenty-first century and to prepare and inspire a much larger and more diverse number of students to pursue the innovative and creative careers of the future. The abilities to effectively use and create technology to solve complex problems are the new and essential literacy skills of the twenty-first century.

Learning Progression

Grade Spans	Strands			
K-2	Computing and Society [CAS] a. Safety and Security b. Ethics and Laws c. Interpersonal and Societal Impact	Digital Tools and Collaboration [DTC] a. Digital Tools b. Collaboration & Communication c. Research	Computing Systems [CS] a. Computing Devices b. Human & Computer Partnerships c. Networks d. Services	Computational Thinking [CT] a. Abstraction b. Algorithms c. Data d. Programming and Development e. Modeling and Simulation
3-5				
6-8				
9-12				

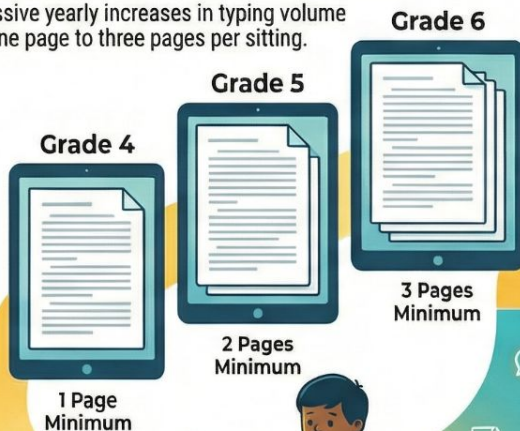
Practices

Connecting, Creating, Abstracting, Analyzing, Communicating, Collaborating, Research

The Digital Writing Journey: K-8 Progression of Standards

Grades 4-6: Keyboarding Stamina

Successive yearly increases in typing volume from one page to three pages per sitting.



Foundations of Digital Literacy (K-Grade 6)



K-2: Guided Exploration

Students explore and use digital tools with adult support to publish and collaborate.

Grade 3: Tech Independence

Shift to independent technology use for publishing, incorporating specific keyboarding skills and interaction.

Advanced Research & Synthesis (Grades 7-8)



ELA Standard Progression with Technology Strands Embedded

K: With guidance and support from adults, explore a variety of digital tools to produce and publish writing, including collaboration with peers.

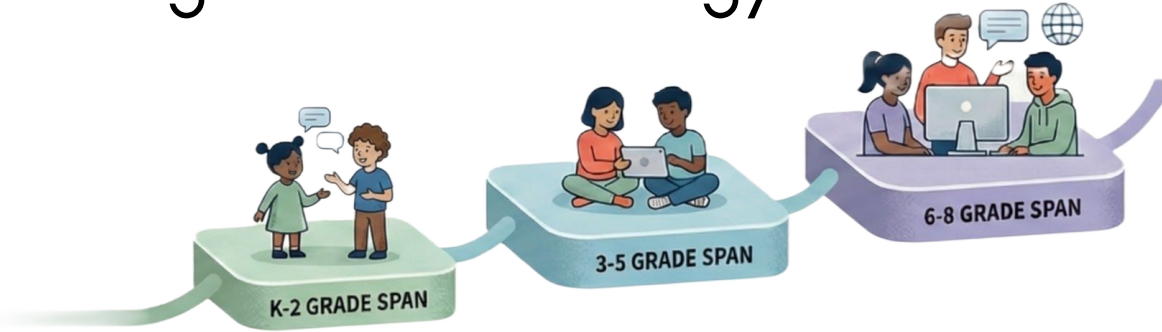
2: With guidance and support from adults, use a variety of digital tools to produce and publish writing, including collaboration with peers.

4: Use technology, including current web-based communication platforms, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in a single sitting.

6: Use technology, including current web-based communication platforms, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of three pages in a single sitting.

8: Use technology, including current web-based communication platforms, to produce and publish writing and present the relationships between information and ideas efficiently as well as to interact and collaborate with others.

Social Emotional Learning with Technology Strands Embedded



DLCS STRAND	PRIMARY SEL CONNECTION	K-8 FOCUS AREA
 Computing and Society 	 Responsible Decision-Making	Ethics, Laws, and Safety
 Digital Tools & Collaboration 	 Relationship Skills	Communication and Research
 Computational Thinking 	 Self-Management	Persistence in Problem-Solving

Digital Literacy & Well-Being

Common Sense Media Topics

Healthy Habits • Privacy & Safety • Digital Footprint & Identity • Relationships & Communication • Cyberbullying & Online Harms • Information & Media Literacy

K-5
Library Class

6-8
Digital Literacy &
Computer Science

Privacy & Safety • Digital
Footprint & Identify •
Relationships &
Communication • AI
Awareness

6 & 7
Library
Pathways

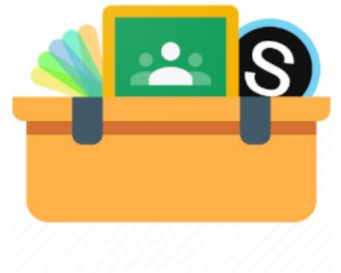
Privacy & Safety • Information
& Media Literacy




















































































6-8
Wellness

Healthy Habits • Relationships
& Communication •
Cyberbullying & Online Harm •
Information & Media Literacy



























































































Instructional Technology Tools

Cross Content Connections



K	1	2	3	4	5	6	7	8	
Seesaw      	Google Classroom     			Schoology      					
Bridges Math Apps & Additional Resources   		Bridges Math Apps   							
		Canva    							
		Screencastify Submit     							
		EdPuzzle      							
		Peardeck      							
		NoodleTools   							
		Get Epic!    							
					PhET Interactive Simulations   				
		Typing Club   							
		Math Fact Lab   							
							IXL (Math)  		
							Amplify (Math)   		
							Soundtrap (Music)  		
							Noteflight (Music)  		
							Delightex Edu (DLCS)  		
							Tinkercad (Engineering)   		
							Storyboard That    		
		 = DLCS  = ELA  = MATH  = SCI/ENGINEERING  = HISTORY & SOCIAL SCIENCE  = SEL							

K	1	2	3	4	5	6	7	8	
Seesaw	Google Classroom		Schoology						
		Google Apps (Docs, Slides, Sheets, Forms, Sites)							
Bridges Math Apps & Additional Resources	Bridges Math Apps								
		Canva							
	Screencastify Submit								
		EdPuzzle							
		Peardeck							
		NoodleTools							
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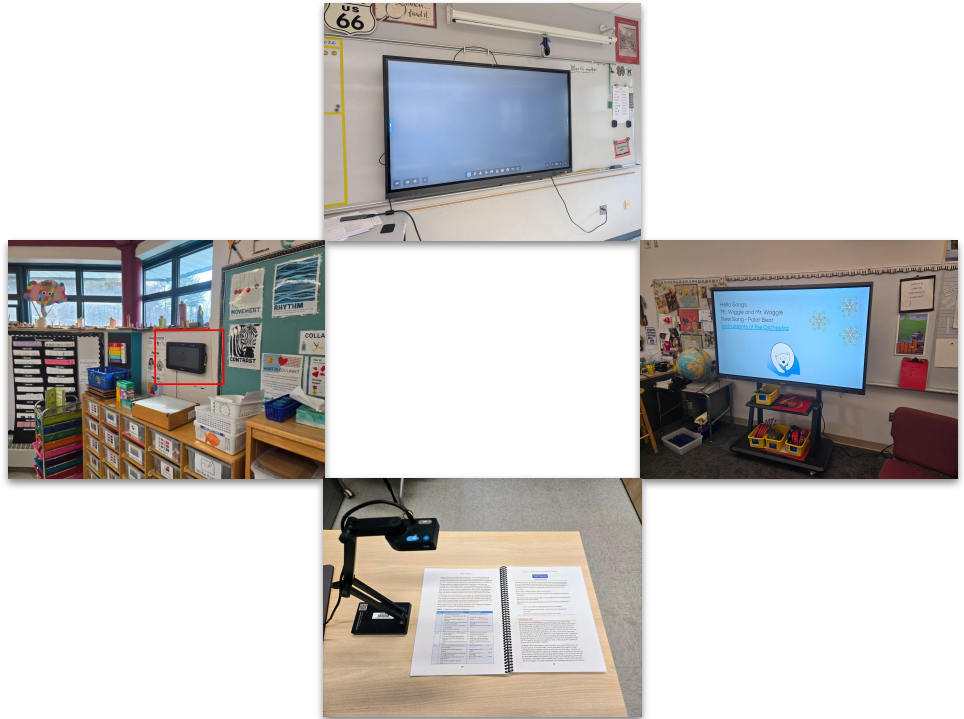
K	1	2	3	4	5	6	7	8
Assistive Technology								
Google Read & Write								
Kami								
Chromebook Built-in Accessibility Tools								
Google Apps Built-in Tools								
Seesaw		Google Classroom				Schoology		
		Google Apps (Docs, Slides, Sheets, Forms, Sites)						
Bridges Math Apps & Additional Resources		Bridges Math Apps						
		Canva						
		Screencastify Submit						
		EdPuzzle						
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				Noteflight (Music)				
				Delightex Edu (DLCS)				
				Tinkercad (Engineering)				
				Storyboard That				

Staff Learning Opportunities

- New Teacher Orientation
- ILAP Sessions
- Staff/Department Meetings
- Book Studies
- Summer Courses
- DESE AI Literacy Workshop for Educators (February 24th)

Resources – UDL Classroom

- Interactive Display
- Audio System
- Document Camera
- Wireless projection, etc.
- 5-Year Plan (completed 2 years)
- Roughly 230 instructional spaces



Resources

- Teachers and support staff - a Chromebook
- Elementary school students - classroom-based Chromebook carts
- Middle school students - 1:1 program allows students to use a Chromebook at school and take it home
- Technology office hours provides for on-site troubleshooting

Operations

Wired & Wireless Infrastructure

Phone System

Security Cameras

Cafeteria Point of Sale

Aspen Family Portal

Badge & Door System

Community Messaging Platforms

Student Information System

State & Federal Reporting

Nurses' Offices

Coordinating Contracts & Vendors

District Website

District & School Websites

Library Collection & Circulation

Payroll & Purchase Orders

Forms & Surveys

Staff Absence & Sub Management

Professional Development Tracking

Student Scheduling

Inventory

Assessment Rostering (MCAS, NAEP, TMP,
etc.)

Chromebook repair

Assessment Data Support

Setting up 100s of Chromebooks/year

Syncing online data systems

Student Data Privacy Contracts

Budget Development & Planning

Bus Route Management

New Student Registration

Staff Evaluation System

Report Cards & IEP Progress Reports

Cybersecurity

ADA Compliance

School Assembly Spaces (AV)

etc.

Save the date
for
an online parent Listen & Learn AI Event
Monday, March 30th



An online parent “Listen & Learn AI” Event

Monday, March 30th

7PM

Sudbury Public Schools School Committee Meeting

Date: January 26, 2026

Agenda Item: Consent Calendar

- a. CASE Collaborative Q2 Report
- b. ACCEPT Collaborative Q2 Report
- c. Policy Subcommittee Meeting Minutes (01/16/2026)
- d. Sudbury Public Schools Town Report (2025)
- e. Monthly Accounts Payable and Payroll Warrant Submissions
- f. Minutes (12/08/25, 12/09/25 and 12/15/25)
- g. January At-A-Glance Newsletter and Community Email
- h. Update copy for School Committee Website Regarding Public Comment

Recommendation:

Move to approve the Consent Calendar as presented / amended.

Background Information:

Attachments:

CASE Collaborative Annual Report 2024-2025
CASE Collaborative Financial Statements FY25
FY25 ACCEPT ANNUAL REPORT FINAL approved 12_10_25
ACCEPT Q2 Overview and Financial Report.docx
3-01162026 Policy Subcommittee Minutes
SPS Town Report 2025
SC Meeting Warrant Summary - 011526
120825_Sudbury School Committee Minutes_DRAFT
120925_Sudbury School Committee Minutes_DRAFT
121525_Sudbury School Committee Minutes_DRAFT
7-EDITED_KJ_January 2026 At-A-Glance.docx
8-Community Letter DRAFT
9-Website - About The School Committee - Sudbury Public Schools

Action: XX **Report:** **Discussion:** XX

**CONCORD AREA SPECIAL
EDUCATION (CASE)
COLLABORATIVE**

**ANNUAL REPORT
FY2024-2025**

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(Successful completion of the Kindness Challenge at Colebrook School in January 2025; The school completed 100 acts of kindness within a couple of weeks

Letter from Executive Director

Dear Members,

Concord Area Special Education (CASE) Collaborative provided strong services to its communities during School Year 2024-2025. These services were based on our core values of Caring, Excellence, and Collaboration. The incredible CASE staff, whether in our classrooms, in our vans, or in our offices, demonstrated a commitment to providing high quality services to our students and families.

This Annual Report offers a review of CASE's accomplishments during the past year. We served students in our *special education programs* in a variety of settings - in public schools and in our Approved Public Day setting. CASE had the distinction of providing services at all levels, from preschool all the way through post high school. The primary disabilities of students at CASE included those with severe developmental, cognitive, and medical needs, developmental disabilities, autism spectrum disorder, and social emotional disabilities.

As part of our *transportation* service to our members, we transported students to approximately 35 locations in towns all over the commonwealth. Our Transportation Department was required to continually adapt its services with very short notice based on the specific circumstances as a result of the pandemic. These changes were obviously challenging but the staff never wavered in their professionalism or commitment to maintaining student safety.

Our district-based *consultation* services was another way in which CASE supported districts. Consultation in special education, a collaborative process where our specialists supported teachers, administrators, schools, and families to solve academic, behavioral, or instructional challenges. It involved problem identification, data review, planning interventions, and monitoring progress.

Evaluation of special education programs was undertaken by our consultants whereby they examined how well a school or district's services were meeting the needs of students with disabilities. They looked at student progress, the quality of instruction, implementation of IEPs, staff training, use of resources, and compliance with legal requirements. The goal was to determine what is working, identify areas for improvement, and ensure that students receive effective, evidence-based support.

Professional development (PD) offered throughout the year by our consulting department helped educators and administrators build the skills needed to support students with disabilities. Effective PD was ongoing, practical, and focused on evidence-based practices such as behavior support, differentiation, UDL, and collaboration.

The CETT team played a prominent role during the past school year in *consultation, education, and training through technology*. The Mission of the CASE CETT Team is to support the use of Assistive Technology (AT) and Alternative-Augmentative Communication (AAC) for students from the CASE Collaborative communities and local school districts.

The CETT Team strives to provide guidance, support and consultation to educational teams in the selection and use of appropriate assistive technology and AAC systems, with the goal of helping students access the curriculum, meet individual educational goals, and communicate functionally and meaningfully. We made other important strides in technology, including a weekly newsletter focused primarily on sharing tech tools and resources with staff.

Our flexibility and creativity are the hallmark of our operations. These were born out of our commitment to our students, families, and staff. As we look back on our accomplishments, we are justifiably proud of the diverse array of service CASE provided during the 2024-2025 school year as a collective whole.

Sincerely,

Sanchita Banerjee
Executive Director



(Graduating Class of CASE Collaborative's Colebrook School - June 2025)

Mission of CASE Collaborative

CASE Collaborative's mission is to maximize the full potential of students with disabilities in enriched and supportive academic, social, recreational, and vocational environments.

Purpose of CASE Collaborative

CASE Collaborative is an education collaborative established in 1974 to meet the regional needs of member school districts in the areas of special education programming and transportation. Comprised of eleven regional and municipal school districts serving the Greater Boston metropolitan area, CASE is governed by a Board of Directors consisting of the superintendents of member districts. The current CASE Collaborative Agreement was approved by the Massachusetts Department of Elementary and Secondary Education (DESE) on November 20, 2015. As stated in the Collaborative Agreement, CASE's primary purpose is to "jointly conduct regional educational programs and services on behalf of member school committees."

Working collaboratively with CASE allows school districts to plan, develop, and implement programs for students with disabilities. CASE programs afford school districts the opportunity to provide a full continuum of special education services to meet the needs of a wide range of students. Additionally, CASE offers special education transportation services to member districts, and technology consultation. Further, parent engagement is an integral component of the Collaborative.



(Students in all CASE programs were celebrated in poignant ceremonies in June 2025)

CASE Board of Directors

MEMBER DISTRICTS	SUPERINTENDENT
Acton – Boxborough	Peter Light (Vice-Chair)
Bedford	Cliff Chuang
Carlisle	James O’Shea
Concord	Laurie Hunter
Concord-Carlisle	Laurie Hunter
Harvard	Linda Dwight
Lincoln	Parry Graham
Lincoln-Sudbury	Andrew Stephens
Littleton	Kelly Clenchy
Maynard	Brian Haas
Sudbury	Brad Crozier (Chair)



Key Management Staff

NAME	ROLE
Sanchita Banerjee	<i>Executive Director</i>
Melissa Devine	<i>Assistant Director</i>
Joe Adams	<i>Directors of Finance and Operations</i>
Carla Chioda	<i>Program Administrator</i>
Amanda Martinage	<i>Principal/Program Administrator</i>
Martin Finnegan	<i>Transportation Administrator</i>
Allison Letizi	<i>Treasurer</i>

CASE Collaborative Address



120 Meriam Rd. Concord, MA 01742

978-318-1534

caseinfo@casecollaborative.org

<h1 style="font-size: 2em; margin: 0;">6</h1> <p style="text-align: center; font-weight: bold; margin: 5px 0;">Locations</p> <hr style="width: 80%; margin: 5px auto;"/> <p style="font-size: 0.8em; margin: 0;">Spread across several member school districts, CASE Collaborative classrooms offer a nurturing space crafted for our students' unique needs.</p>	<h1 style="font-size: 2em; margin: 0;">500</h1> <p style="text-align: center; font-weight: bold; margin: 5px 0;">Students Transported</p> <hr style="width: 80%; margin: 5px auto;"/> <p style="font-size: 0.8em; margin: 0;">With a fleet of more than 120 vehicles, CASE Collaborative provides special education transportation for its member districts to CASE classrooms.</p>	<h1 style="font-size: 2em; margin: 0;">50</h1> <p style="text-align: center; font-weight: bold; margin: 5px 0;">Years in Business</p> <hr style="width: 80%; margin: 5px auto;"/> <p style="font-size: 0.8em; margin: 0;">Established in 1974, the Concord Area Special Education (CASE) Collaborative supports students and teachers in our districts.</p>
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Website for CASE Collaborative

<https://www.casecollaborative.org/>



SERVICE TO COMMUNITIES

Special Education Programming

All CASE programs are staffed with licensed teachers, teaching assistants, registered behavior technicians, board certified behavior analysts, counselors, occupational therapists, speech and language pathologists, physical therapists, and other related service therapists, including reading specialist, teachers of the visually impaired, orientation and mobility therapists, assistive technology and AAC specialists. The specific mix of professionals and services is dictated by the individual student's IEP.

Programs are available as school year programs, supplemented by an Extended School Year program during the summer. Academic, behavioral, and diagnostic assessments are provided.

Be it in public schools or DESE approved public day setting, our programs offer inclusion opportunities and appropriate school activities that promote a full spectrum of meaningful experiences. Our programs allow students to benefit from the richness of a highly specialized and diverse team of faculty and staff.

Empower Program

Empower (EMP) is a specialized program that meets the needs of students with complex language and learning challenges. Students with a diagnosis of autism spectrum disorder, developmental disabilities, neurological disabilities, and intellectual disabilities are served in this program. Instruction is provided in whole class and small group formats based on grade and age level. This program offers curriculum based on curriculum standards set by DESE, and based on the principles of Applied Behavior Analysis, when appropriate. The curriculum is a blend of functional academics,





social skills instruction, daily living skills, and intensive support from related service providers.

Empower utilizes a multi-sensory approach and provides lessons that integrate language, sensory, and social skills. A total communication approach is used to facilitate language development in the context of direct teaching and the natural environment. Staff address individual student needs with a focus on enhancing independence, self-reliance, responsibility, and social maturity. Assistive technology is integrated throughout the curriculum.

Learning for Life Program

Learning for Life (LFL) is a specialized program that addresses the many different cognitive, physical, medical, communication, and social needs of students. Instruction is individualized to address each student's unique needs. As appropriate, physical, visual, and verbal prompts, technology, and assistive devices are incorporated into each student's program. The curriculum helps build independence and includes functional academics and daily living skills. Activities, materials, and instructional strategies are age and cognitively appropriate. LFL staff provide immediate feedback and provide numerous opportunities to maintain and generalize academic and life skills.





Students in this program are provided extensive opportunities to demonstrate independence and self-advocacy skills, engage in social interactions,



multitude of community settings.

access community resources, and beginning at age 14, acquire and practice vocational skills in a

Therapeutic Intervention Program



The Therapeutic Intervention Program (TIP) is a specialized program that meets the needs of students experiencing mental health issues, school adjustment issues, trauma history, behavioral and social challenges, and other issues interfering with accessing grade-level curriculum and making substantial progress.

TIP offers a supportive environment to students with average to above-average cognitive profiles. Programs are developed based on students' grade and skill levels

utilizing engaging curriculum to meet the specific needs of the students, who are held to high academic standards. The rigorous curriculum outlines clear learning outcomes with matching assessments. Clinical support is provided in both individual and group modalities. All related services are available as necessary for all students; vocational and transition services are provided to students age 14 and older.



(A rewarding, meaningful, and productive school year)



SERVICE TO COMMUNITIES

Extended School Year (ESY) Services

A five-week summer program was available for students whose IEPs called for an extended year program. The CASE Extended Year Program typically addresses the students' IEP goals and benchmarks over the summer in much the



same manner as the regular school year program. For the summer, all district classrooms were located at the Willard School in Concord along with the programs at Colebrook School in Acton. Students participated in academic instruction, community trips, and social skills activities. The Thoreau Club welcomed CASE back for weekly swim trips.

Staffing and Services in CASE Programs

- Special Education Teachers
- Teaching Assistants
- ABA Tutors
- Board Certified Behavior Analysts
- School Counselors
- Speech and Language Therapists
- Occupational Therapists
- Physical Therapists
- Teacher of the Visually Impaired
- Deaf/Blind Services
- Orientation & Mobility Services
- Consulting Teacher of the Deaf
- Nursing
- Reading Specialist
- EL Services
- CETT (Assistive Technology/AAC Services)



Admission Process For Case Programs

CASE Collaborative works with partner school districts to accept students referred to our programs. Students typically have a current Individualized Education Program (IEP). CASE can provide an Extended Evaluation in programs. The admissions process is comprehensive in order to ensure that each child's program is designed to maximize potential.

Referral

We request that parents work with their school district to begin the referral process. This allows us to make the visit as productive as possible by guiding families to appropriate classrooms and services that are best for their child. It's helpful to have a complete referral packet in advance of a visit. However, there are some circumstances where the sending district may make a special request for a family to visit before all the paperwork has been shared with CASE Collaborative. To make a referral, CASE is contacted at caseinfo@case.org or 978-318-1534.

Intake Assessment Review

The process usually is completed within 72 hours of receipt of a packet.

Tours

Parents and students will meet with CASE staff and have an opportunity to meet with staff and students in the program. Parents tour the school building and observe classrooms in action. The visit lasts approximately one hour and concludes with an opportunity to ask follow up questions. Students are then invited back for a visit day that may be scheduled for an hour or a full day.

Suitability

Once the intake, parent tours and student visit days are complete, CASE Collaborative determines whether our program is a good fit and can address the unique learning, behavioral, and social/emotional needs of the student. A determination is sent to the sending district.

Caring

It starts the minute a student gets on the bus, and it's the foundation of everything we do as a community. Caring means supporting, challenging and persevering. It means taking the time to identify and connect with each individual's unique qualities.

Excellence

We have high standards and set high expectations for our teachers and our students. There are always challenges. But we are resourceful and find new ways to support our students' growth.

Collaboration

Growth, learning and successful transitions flourish in a connected environment. Collaboration and communication are essential across our network: students and their families, drivers, teachers, therapists, administrators, host schools and the broader community.

Locations of CASE Programs (2024-25)



C.A.S.E. COLLABORATIVE CONTINUUM OF CLASSES 2024 - 2025

LFL Early Childhood¹
Davis School (Bedford PS)

Ages 3 - 7



LFL Elementary¹
Davis School (Bedford PS)

Grades 1 - 4



LFL Middle, High³
Colebrook School (Acton)

Grades 4 - 7/
Grades 8 - 11



EMP Early Childhood¹
Lincoln School (Lincoln PS)

Ages 3 - 7



EMP Lower Elementary¹
Gates School
(Acton Boxborough RSD)

Grades K - 2



EMP Upper Elementary¹
Russell St. School (Littleton PS)

Grades 3 - 5



EMP Middle¹
Littleton Middle School
(Littleton PS)

Grades 6 - 8



EMP High³
Colebrook School (Acton)

Grades 8 - 11



RISE Program³
Colebrook School (Acton)

Post High School Program
(Ages 18 - 22)



EMP/TIP Middle²
Fowler Middle School
(Maynard PS)

Grades 5 - 8



EMP High³
Colebrook School (Acton)

Grades 9 - 12



TIP Elementary²
Douglas School
(Acton Boxborough RSD)

Grades K - 4



TIP Middle²
Fowler Middle School
(Maynard PS)

Grades 5 - 8



TIP High³
Colebrook School (Acton)

Grades 9 - 12/
Post High School

CONTACT INFORMATION

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LEGEND

LFL - Learning for Life Program
[Multiple Disabilities]

EMP - Empower Program
[Autism Spectrum Disorder/
Developmental Disabilities]

TIP - Therapeutic Intervention Program
[Social/Emotional Disabilities]

RISE - Post High School Prog. (Ages 18-22)
[Developmental Disabilities/
Autism Spectrum Disorders]

October 2024



(Including, welcoming, and nurturing all learners in all settings)

Cost Effectiveness: CASE Programs (2024-2025)

CASE undertook a market survey to ensure tuition rates for 2024-2025 were in line with similar programs offered by other educational services providers. By maintaining competitive rates, we are able to attract students without sacrificing the quality of our programs.

Cost Effectiveness:

Empower Program (EMP)

CASE Collaborative	\$79,950
Non-CASE Programs - "Equalized" average total tuition - 180 days	\$113,743

Comparable Programs include: Community Therapeutic, Protestant Guild, Cardinal Cushing

Cost Effectiveness:

Learning for Life Program (LFL)

CASE Collaborative	\$82,000
Non-CASE Programs - "Equalized" average total tuition - 180 days	\$140,003

Comparable Programs include: BC Campus, Crotched Mountain (NH), Franciscan's Hospital, Perkins Multi-Impaired, Perkins Severely Impaired

Cost Effectiveness:

Therapeutic Intervention Program (K - 8) (TIP)

CASE Collaborative	\$66,625
Non-CASE Programs - "Equalized" average total tuition - 180 days	\$107,930

Comparable Programs include: Walker School, Community Therapeutic, Dearborn, Italian Home, Judge Baker

Cost Effectiveness:

Colebrook TIP High School - Approved Public Day

CASE Collaborative	\$66,625
Non-CASE Programs - "Equalized" average total tuition - 180 days	\$88,773

Comparable Programs include: McLean Hospital - Arlington, Milestones, Walker - Beacon High, James Farr Academy, New England Academy, JRI - Victor School

Enrollment By Grade Level (SY2024-25)

School District	PreSchool	Elementary	Middle School	High School	Post High School
Acton/Boxborough	3	4	4	7	1
Bedford	0	0	0	1	0
Carlisle	0	0	0	0	0
Concord	0	1	0	0	0
Concord/Carlisle	0	0	0	3	0
Harvard	0	1	0	7	0
Lincoln & Lincoln/Hanscom	3	11	3	0	0
Lincoln/Sudbury	0	0	0	3	1
Littleton	0	1	3	2	0
Maynard	0	2	0	1	1
Sudbury	0	0	1	1	0
Non-Member Districts	3	16	16	24	1
TOTALS	9	36	27	49	4
					121



SERVICE TO MEMBER DISTRICTS

Transportation



CASE Transportation provides special education transportation services to public and private special education programs from our member districts, covering over one million miles a year. CASE has a strong history of service in this area. Before the pandemic, we were transporting around 500 students from our member districts. During the school year 2024-2025, we transported approximately 350 students. Again this year we experienced a critical driver shortage. We have long known of the strength of this department and commitment of its members, but this year was yet another example of going above and beyond. Creative thinking, flexibility, and adaptability are just a few areas in which the department shone. The willingness of the Transportation Department staff to do what needed to be done, allowed us to maintain the employment of all of our drivers even though the number of students being transported varied from day to day.

The financial assessment is based upon transporting a student to and/or from school on a set schedule. Every effort is made to contain costs while providing safe transportation for students. The Transportation office consolidates runs within the constraints of a student's IEP. District requests that could impact costs include factors such as: the need for wheelchair/lift vans, requirements for time in transport to be less than required by regulation, additional wait time on pick up or drop off, multiple pick-up and drop off schedules to the same location, monitors, accommodating service animals, medical support personnel accompanying the student, and requests for additional vans to separate students, as well as other unique requirements. CASE Transportation works closely with districts and the school program the student attends to define and implement positive behavioral supports for students as needed and to provide maximum efficiency in consolidated routes, as appropriate. In many cases, this is unavoidable as a necessary component of the student's IEP; however, adjustments are considered and implemented on a regular basis.

Transportation Cost Effectiveness

CASE Transportation provides special education transportation services only to students living in CASE member communities; currently CASE provides such services to nine districts. In addition to its commitment to providing safe, efficient, and courteous transportation for students with disabilities, CASE Transportation maximizes efficiency

and minimizes cost by effective routing which enhances vehicle capacity. One of the largest cost factors for special education transportation is the specialized nature of the service. When a district sends only one or two students to a particular destination, the fee reflects the entire cost of the vehicle and labor. CASE Transportation reduces costs to its districts by combining students from various CASE communities on a single vehicle, even if the students are going to multiple destinations.

TRANSPORTATION ENROLLMENT (2024-2025) ANNUAL SUMMARY	
Students Transported	386
Students Requiring Child Seats (3 to 5 years old)	66
Students Requiring Wheelchair Transportation	28
Programs Students Transported To	88
Number of Destinations (Towns)	39
Total Number of Routes	69
Routes with more than one student	67
Routes with students from more than one CASE district	63
Student Transported Summer 2024 (July/August)	255



SERVICE TO COMMUNITIES

Consultation, Evaluation, Training, and Professional Development

Mission

The 2024–25 school year marked the inaugural year of CASE Collaborative’s School Consulting Services department. Throughout this first year, a team of expert consultants partnered with both member and nonmember districts to enhance and expand high-quality special education programs and services. The work is grounded in collaboration, capacity-building, and the development of long-lasting, meaningful partnerships.

An important component of this model is cost efficiency. By offering high-quality consultation and professional learning at rates significantly lower than many for-profit providers, CASE delivers substantial value to districts. Member districts realize an estimated 33–45% cost savings, while nonmember districts experience 20–36% savings, allowing schools to access expert support while maximizing their resources.



During 2024–25, CASE’s School Consulting Services team supported a total of 26 school districts, including 6 member districts and 20 nonmember districts. Across these collaborations, the team focused on strengthening relationships and delivering impactful consultation, evaluations, and professional development. These efforts were designed to promote inclusive, effective, and student-centered practices that empower districts to meet the diverse needs of all learners.

Embedded in this service is also Consultation, Education, and Training in Technology (CETT). The Mission of the CASE CETT Team is to support the use of Assistive Technology (AT) and Alternative-Augmentative Communication (AAC) for students from the CASE Collaborative communities and local school districts.

The CETT Team strives to provide guidance, support and consultation to educational teams in the selection and use of appropriate assistive technology and AAC systems, with the goal of helping students access the curriculum, meet individual educational goals, and communicate functionally and meaningfully

[Special Education Program Evaluation Services](#)

The School Consulting team offers a highly customized evaluation approach of special education programs that meets DESE's Tiered Focus Monitoring requirements. Examples include specialized programs for students with Autism, Emotional Impairments, and Language-based Learning Disabilities, evaluations of district inclusion models, transitions programs, and early childhood programs.

Our team completed 7 comprehensive program evaluations for Massachusetts public school districts during the 2024-25 school year:

- **Berlin-Boylston Regional Schools:** PK–12 ASD Program
- **Lincoln Public Schools:** PK–8 Social, Emotional, and Behavioral Services
- **Lowell Community Charter School:** K–8 Special Education Services
- **Northampton Public Schools:** PK-5 Special Education Programs and Services
- **Peabody Public Schools:** K–12 Counseling Services
- **Rockport Public Schools:** K–12 Special Education Services
- **Weymouth Public Schools:** PK–12 Life Skills Program

[Student Evaluation Services](#)

Our team of highly qualified experts are available to provide a variety of evaluation services to districts. Evaluators provide testing at the student's current educational placement within the district or other out-of-district placements to minimize student disruptions.

Evaluation services include, but are not limited to:

- Transition Evaluations
- Vocational Evaluations
- Functional Behavior Assessments/Trauma-Informed FBA
- Inclusion Evaluations
- Speech/Language Evaluations
- Occupational Therapy Evaluations

- School Refusal Evaluations

During 2024–25, CASE’s School Consulting Services team provided a total of 21 specialized evaluations to students across member and nonmember districts.

[Consultation Services](#)

Our team of experienced Consultants are available to work with schools for a short or long-term basis. Some examples include consultation to develop / improve specialized district programs, including programs for students with Autism, Emotional Impairments, Language-based Learning Disabilities, and Transition Programs; consultation to strengthen inclusion services, including co-teaching models; consultation to support students with substantial behavioral needs in inclusive and/or substantially separate settings; and consultation to support students with significant developmental trauma.



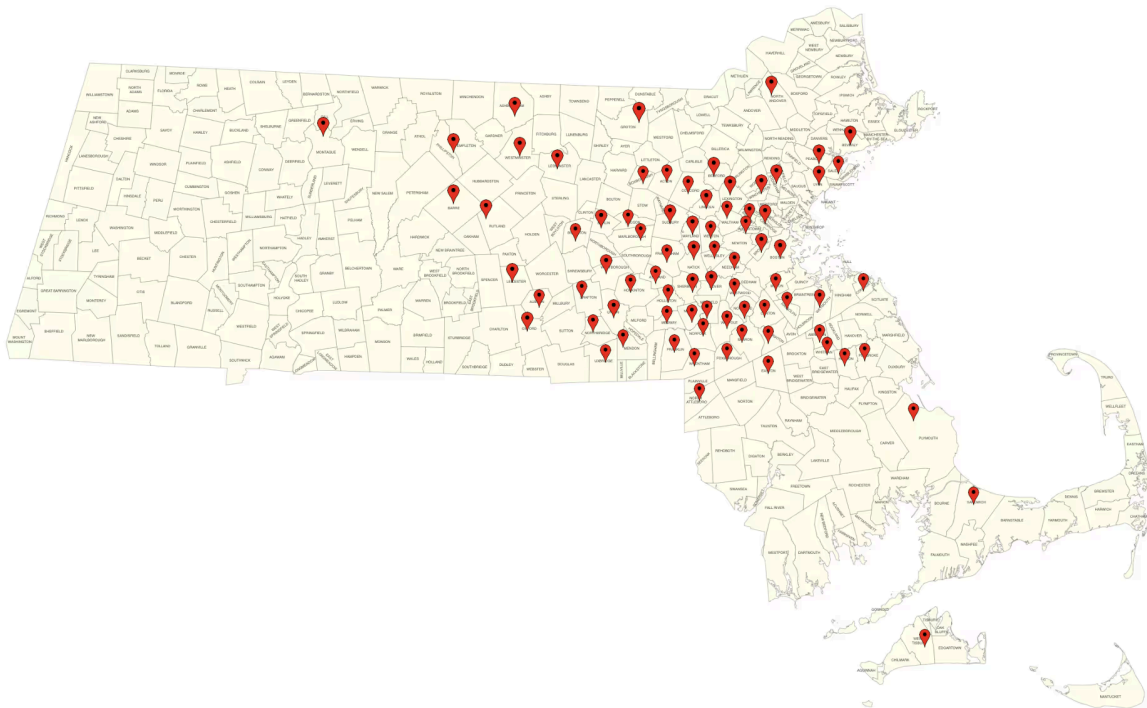
During 2024–25, CASE’s School Consulting Services team provided ongoing consultation services to a total of 14 school districts.

[Professional Development Services](#)

Our team offers on-site professional development workshops tailored to each district’s unique needs. Presenters have expertise in a wide range of topics in the field of education and inclusive practices. Drawing from current best practices and research, we use a variety of active-participation techniques to maintain engagement and deepen educator learning. Workshops are designed to build educator confidence, strengthen instructional practices, and support districts in fostering inclusive, student-centered learning environments.

Highlights of Professional Development services provided to districts and educators during the 2024-25 school year included:

- **Massachusetts Public School BCBA Network:** Monthly professional development series connecting *210 BCBA's from 75+ districts statewide*, in partnership with Massachusetts Association for Applied Behavior Analysis (MassABA)
- **Harvard Public Schools:** Understanding Specially Designed Instruction in Inclusive Classrooms.
- **Randolph Public Schools:** Yearlong series on *The New Massachusetts IEP*, and a *Special Education Leadership Institute for Assistant Principals*.
- **Peabody Public Schools:** Yearlong series on *Best Practices in Therapeutic Programs*.
- **Concord Public Schools:** Parent/Caregiver training and educator coaching on *The New Massachusetts IEP*.
- **Bedford Public Schools:** Summer Paraprofessional PD Series on *Trauma-Informed and Compassionate Practices*.



(Our Consultants Have Partnered With Over 50 Districts Across Massachusetts)

CETT Classroom Consultations

The CETT Team provides AT and AAC services to all CASE classrooms. The CETT Team assists special educators and therapists in the selection of, and training for, various AT/AAC equipment, and acts as a resource for sharing tools and tips. This support is individualized, based on the needs of each classroom.

Examples have included: Coaching teams to help students access digital text and Voice Recognition, and supporting teams in implementing and generalizing use of AAC systems across environments. Assistance may take place in a single brainstorming session or ongoing monthly meetings to discuss assistive technology solutions. The CASE CETT Team is available to all CASE classrooms.



AT and AAC Evaluations, Assessments, and Coaching

For Member and Non-Member Districts

The team provides AT and AAC evaluations on a timeline, assessments with trials and hourly coaching for individual students and classroom programs. The CETT Team's AT services address needs in many areas, such as reading, written expression, and physical access to curriculum. AAC services address communication needs in conjunction with the team to help determine the most appropriate AAC system for students; this includes programming and implementation, facilitating device rentals for trial periods, and helping families obtain private funding for the purchase of devices as needed.

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Tech Tip #4 Images in Google Workspace	Tech Tip #13 YouTube
Tech Tip #5 CETT Team - AAC Support	Tech Tip #14 Monarch Reader
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Tech Tip #7 October is Dyslexia Awareness Month	Tech Tip #16 Free iPad Apps
Tech Tip #8 Toy Theater	Tech Tip #17 Winter Activities
Tech Tip #9 Create Gmail Templates	Tuesday Tech Tips 2025

Evaluations and assessments often include observations, meeting with the special education team to discuss possible AT/AAC interventions, training when necessary, field testing with a student and a written report summarizing recommendations.

Coaching sessions are guided by the needs of the student and the team. They often

include observation of the student, a loan from our lending library if needed, training and brief notes of each meeting.

[CETT Team Lending Library](#)

The CETT Team has an assortment of both low- and high-tech Assistive Technology tools in their lending library. The library has a range of software and hardware, including AAC devices that are available on a short-term loan basis. The purpose of this lending library is to provide educators and students with the opportunity to try these products prior to purchasing them. The CETT Team is continuously reviewing new equipment on the market and making purchases, as appropriate, to ensure that current assistive technology tools are available for loan.



Fiscal Year 2025 Financial Audit Report

The CASE Board of Directors commissioned an independent financial audit for the year ending June 30, 2025 from CBIZ. The findings are presented to the Board of Directors at their December 12, 2025 meeting. The financial audit report is included as part of this annual report via electronic link.



(CASE Collaborative celebrated 50 years of service last year. CASE commemorated this milestone with the creation of a CASE Collaborative Quilt. Different stakeholders contributed a square that was patched together to make this quilt)

DRAFT

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

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CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

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Performed in Accordance with *Governmental Auditing Standards* 58-59**

Independent Auditors' Report

To the Board of Directors
Concord Area Special Education Collaborative

Report on the Audit of the Financial Statements

Opinions

We have audited the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information of the Concord Area Special Education Collaborative (the "Collaborative"), as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise the Collaborative's basic financial statements as listed in the table of contents.

In our opinion, the accompanying financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, each major fund, and the aggregate remaining fund information of the Collaborative, as of June 30, 2025, and the respective changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America ("GAAS") and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States ("*Government Auditing Standards*"). Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Collaborative and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

The Collaborative's management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Collaborative's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Collaborative's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Collaborative's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that Management's Discussion and Analysis, and required supplementary information, as listed in the table of contents, be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial

statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Information

Management is responsible for the other information included in this report. The other information comprises the required disclosures by the Massachusetts Department of Elementary and Secondary Education for Massachusetts Educational Collaboratives but does not include the basic financial statements and our auditors' report thereon. Our opinions on the basic financial statements does not cover the other information, and we do not express an opinion or any form of assurance on them.

In connection with our audit of the basic financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected misstatement of the other information exists, we are required to describe it in our report.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated _____, 2025, on our consideration of the Collaborative's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Collaborative's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Collaborative's internal control over financial reporting and compliance.

Boston, MA

Report Date

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

MANAGEMENT'S DISCUSSION AND ANALYSIS

FOR THE YEAR ENDED JUNE 30, 2025

As management of the Concord Area Special Education Collaborative (the "Collaborative"), we offer readers this narrative overview and analysis of the financial activities of the Collaborative for the fiscal year ended June 30, 2025.

Overview of the Financial Statements

This discussion and analysis is intended to serve as an introduction to the basic financial statements. The basic financial statements are comprised of three components (1) government-wide financial statements, (2) fund financial statements, and (3) notes to financial statements. This report also contains required supplementary information and other information in addition to the basic financial statements themselves.

Government-Wide Financial Statements

The government-wide financial statements are designed to provide readers with a broad overview of our finances in a manner similar to a private-sector business.

The Statement of Net Position presents information on all assets, liabilities, and deferred outflows and inflows of resources with the difference reported as net position. Over time, increases or decreases in net position may serve as a useful indicator of whether the financial position is improving or deteriorating.

The Statement of Activities presents information showing how the Collaborative's net position changed during the most recent fiscal year. All changes in net position are reported as soon as the underlying event giving rise to the change occurs, regardless of the timing of related cash flows. Thus, revenues and expenses are reported in this statement for some items that will only result in cash flows in future fiscal periods (e.g., uncollected tuition and fees and earned but unused vacation leave).

Fund Financial Statements

A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives. Fund accounting is used to ensure and demonstrate compliance with finance-related legal requirements. The Collaborative's funds can be divided into two categories: governmental funds and fiduciary funds.

Governmental Funds

Governmental funds are used to account for essentially the same functions reported as governmental activities in the government-wide financial statements. However, unlike the government-wide financial statements, governmental fund financial statements focus on near-term inflows and outflows of spendable resources, as well as on balances of spendable resources available at the end of the fiscal year. Such information may be useful in evaluating the Collaborative's near-term financing requirements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

MANAGEMENT'S DISCUSSION AND ANALYSIS

FOR THE YEAR ENDED JUNE 30, 2025

Because the focus of governmental funds is narrower than that of the government-wide financial statements, it is useful to compare the information presented for governmental funds with similar information presented for governmental activities in the government-wide financial statements. By doing so, readers may better understand the long-term impact of the Collaborative's near-term financing decisions. Reconciliations are provided to facilitate the comparison between governmental funds and governmental activities.

Fiduciary Funds

Fiduciary funds are used to account for resources held for the benefit of parties outside the Collaborative. Fiduciary funds are not reflected in the government-wide financial statements because the resources of those funds are not available to support the Collaborative's programs.

Notes to Financial Statements

The notes provide additional information that is essential to a full understanding of the data provided in the government-wide and fund financial statements.

Other Information

In addition to the basic financial statements and accompanying notes, this report also presents certain required supplementary information which is required to be disclosed by accounting principles generally accepted in the United States of America, which includes information concerning the Collaborative's budgetary comparisons for the general fund and its pension and other postemployment benefit obligations. This report also presents other information as required by Massachusetts General Law (M.G.L.) Chapter 40, Section 4E.

Financial Highlights

- As of the close of the current fiscal year, net position in governmental activities was \$3,643,720, an increase of \$1,121,977.
- As of the close of the current fiscal year, governmental funds reported combined ending fund balances of \$6,239,835, an increase of \$691,265 in comparison to the prior year.
- At the end of the current fiscal year, unassigned fund balance for the General Fund was \$5,024,575, an increase of \$1,249,799 in comparison to the prior year.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

MANAGEMENT'S DISCUSSION AND ANALYSIS

FOR THE YEAR ENDED JUNE 30, 2025

Government-Wide Financial Analysis

The following is a condensed summary of government-wide financial data for the current and prior fiscal year.

Net Position

	Governmental Activities	
	2025	2024
Assets		
Current and other assets	\$ 7,195,764	\$ 6,411,800
Capital assets	<u>2,606,757</u>	<u>2,816,288</u>
Total Assets	<u>9,802,521</u>	<u>9,228,088</u>
Deferred Outflows of Resources	<u>738,273</u>	<u>839,794</u>
Liabilities		
Other liabilities	955,929	863,230
Long-term liabilities	<u>4,107,831</u>	<u>4,437,060</u>
Total Liabilities	<u>5,063,760</u>	<u>5,300,290</u>
Deferred Inflows of Resources	<u>1,833,314</u>	<u>2,245,849</u>
Net Position		
Net investment in capital assets	1,062,383	1,032,462
Restricted	85,670	84,991
Unrestricted	<u>2,495,667</u>	<u>1,404,290</u>
Total Net Position	<u>\$ 3,643,720</u>	<u>\$ 2,521,743</u>

As noted earlier, net position may serve over time as a useful indicator of the Collaborative's financial position. At the close of the most recent fiscal year, total net position was \$3,643,720, an increase of \$1,121,977 in comparison to the prior year.

Net position of \$1,062,383 reflects our investment in capital assets (e.g., transportation vehicles), less any related debt used to acquire those assets that is still outstanding. These capital assets are used to provide services; consequently, these assets are not available for future spending. Although the investment in capital assets is reported net of related debt, it should be noted that the resources needed to repay this debt must be provided from other sources, since the capital assets themselves cannot be used to liquidate these liabilities.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

MANAGEMENT'S DISCUSSION AND ANALYSIS

FOR THE YEAR ENDED JUNE 30, 2025

An additional portion of net position, \$85,670, represents resources that are subject to external restrictions on how they may be used. The remaining balance of unrestricted net position, \$2,495,667, may be used to meet the Collaborative's ongoing obligations.

Change in Net Position

	Governmental Activities	
	2025	2024
Revenues		
Program revenues:		
Charges for services	\$ 5,812,129	\$ 5,383,847
Operating grants and contributions	1,568,047	1,954,802
General revenues:		
School year program member tuition and fees	4,188,162	4,248,689
School year program non-member tuition and fees	5,100,726	3,938,678
Summer program tuition and fees	633,374	495,500
Investment income	144,875	163,208
Miscellaneous	1,033,091	649,811
Total Revenues	<u>18,480,404</u>	<u>16,834,535</u>
Expenses		
Administration	1,017,860	937,444
Supervision	1,094,350	1,234,386
Instruction	8,455,935	7,980,305
Transportation	6,790,282	6,160,588
Total Expenses	<u>17,358,427</u>	<u>16,312,723</u>
Change in Net Position	1,121,977	521,812
Net Position - Beginning of Year	<u>2,521,743</u>	<u>1,999,931</u>
Net Position - End of Year	<u>\$ 3,643,720</u>	<u>\$ 2,521,743</u>

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

MANAGEMENT'S DISCUSSION AND ANALYSIS

FOR THE YEAR ENDED JUNE 30, 2025

Governmental Activities

Governmental activities for the year resulted in an increase in net position of \$1,121,977. Key elements of this change are as follows:

Return of prior year surplus	\$	(428,686)
Capital acquisitions less depreciation expense		51,742
Change in net OPEB liability, net of related deferrals		490,575
Repayment of lease liability		239,452
Other		<u>768,894</u>
	\$	<u>1,121,977</u>

Financial Analysis of the Collaborative's Funds

As noted earlier, fund accounting is used to ensure and demonstrate compliance with finance-related legal requirements.

Governmental Funds

The focus of governmental funds is to provide information on near-term inflows, outflows, and balances of spendable resources. Such information is useful in assessing financing requirements. In particular, unassigned fund balance may serve as a useful measure of the Collaborative's net resources available for spending at the end of the fiscal year.

General Fund

The General Fund is the chief operating fund. At the end of the current fiscal year, unassigned fund balance of the General Fund was \$5,024,575, while total fund balance was \$6,221,559. As a measure of the General Fund's liquidity, it may be useful to compare both unassigned fund balance and total fund balance to General Fund expenditures. Refer to table below.

General Fund	June 30, 2025	June 30, 2024	Change	% of General Fund Expenditures*
Unassigned fund balance	\$ 5,024,575	\$ 3,774,776	\$ 1,249,799	31.0%
Total fund balance	\$ 6,221,559	\$ 5,530,973	\$ 690,586	38.4%

* Expenditure amounts used to calculate the above percentages have been adjusted to exclude the on-behalf payment from the Commonwealth of Massachusetts to the Massachusetts Teachers Retirement System of \$1,023,170 and from the Commonwealth of the Massachusetts State Employees' Retirement System of \$700,293.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

MANAGEMENT'S DISCUSSION AND ANALYSIS

FOR THE YEAR ENDED JUNE 30, 2025

The total fund balance of the General Fund increased by \$690,586 during the current fiscal year. Primarily reflecting positive fiscal year 2025 budgetary result, softened by the return of surplus and expenditures of prior encumbrances.

General Fund Budgetary Highlights

There was no difference between the total original budget and the final amended budget in fiscal year 2025.

Capital Assets and Debt Administration

Capital Assets

Total investment in capital assets for governmental activities at year-end amounted to \$2,606,757 (net of accumulated depreciation and amortization). This investment in capital assets includes transportation vehicles and right to use leased assets. Major capital asset events during the current fiscal year included the following:

- \$454,798 – Acquisition of vehicles

Additional information on capital assets can be found in the Notes to Financial Statements.

Long-Term Debt

At the end of the current fiscal year, the Collaborative had no outstanding long-term bonded debt.

At the end of the current fiscal year, the Collaborative leases office space under right-to-use leases totaling \$1,544,374.

Additional information on long-term debt can be found in the Notes to Financial Statements.

Requests for Information

This financial report is designed to provide a general overview of the Concord Area Special Education Collaborative's finances for all those with an interest in the Collaborative's finances. Questions concerning any of the information provided in this report or requests for additional financial information should be addressed to:

Sanchita Banerjee
Executive Director
Concord Area Special Education Collaborative
120 Meriam Road
Concord, Massachusetts 01742

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

STATEMENT OF NET POSITION

JUNE 30, 2025

	<u>Governmental Activities</u>
Assets	
Current Assets	
Cash and short-term investments	\$ 6,827,572
Accounts receivable	293,942
Other assets - security deposit	<u>74,250</u>
Total Current Assets	<u>7,195,764</u>
Noncurrent Assets	
Right to use leased assets, net of accumulated amortization	1,354,661
Other capital assets, net of accumulated depreciation	<u>1,252,096</u>
Total Noncurrent Assets	<u>2,606,757</u>
Total Assets	<u>9,802,521</u>
Deferred Outflows of Resources	
Related to OPEB	<u>738,273</u>

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

STATEMENT OF NET POSITION (CONTINUED)

JUNE 30, 2025

Liabilities

Current Liabilities

Warrants and accounts payable	331,575
Accrued liabilities	624,354
Current portion of long-term liabilities:	
Lease liability	257,491
Compensated absences	<u>2,653</u>

Total Current Liabilities 1,216,073

Noncurrent Liabilities

Lease liability, net of current portion	1,286,883
Compensated absences	103,460
Net OPEB liability	<u>2,457,344</u>

Total Noncurrent Liabilities 3,847,687

Total Liabilities 5,063,760

Deferred Inflows of Resources

Related to OPEB	<u>1,833,314</u>
-----------------	------------------

Net Position

Net investment in capital assets	1,062,383
Restricted for:	
Grants and other	11,420
Nonspendable for security deposit	74,250
Unrestricted	<u>2,495,667</u>

Total Net Position \$ 3,643,720

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

STATEMENT OF ACTIVITIES

FOR THE YEAR ENDED JUNE 30, 2025

		Program Revenues		Net (Expenses) Revenues and Changes in Net Position
	Expenses	Charges for Services	Operating Grants and Contributions	Governmental Activities
Governmental Activities				
Administration	\$ 1,017,860	\$ --	\$ 35,153	\$ (982,707)
Supervision	1,094,350	--	12,522	(1,081,828)
Instruction	8,455,935	--	900,882	(7,555,053)
Transportation	<u>6,790,282</u>	<u>5,812,129</u>	<u>619,490</u>	<u>(358,663)</u>
Total Governmental Activities	<u>\$ 17,358,427</u>	<u>\$ 5,812,129</u>	<u>\$ 1,568,047</u>	<u>(9,978,251)</u>
		General Revenues		
			School year program member tuitions and fees	4,188,162
			School year program non-member tuitions and fees	5,100,726
			Summer program tuition and fees	633,374
			Investment income	144,875
			Miscellaneous	<u>1,033,091</u>
			Total General Revenues	<u>11,100,228</u>
			Change in Net Position	1,121,977
			Net Position, Beginning of year	<u>2,521,743</u>
			Net Position, End of year	<u>\$ 3,643,720</u>

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

**BALANCE SHEET
GOVERNMENTAL FUNDS**

JUNE 30, 2025

	General Fund	Nonmajor Governmental Funds	Total Governmental Funds
Assets			
Cash and short-term investments	\$ 6,809,296	\$ 18,276	\$ 6,827,572
Accounts receivable	293,942	--	293,942
Security deposit	74,250	--	74,250
Total Assets	<u>\$ 7,177,488</u>	<u>\$ 18,276</u>	<u>\$ 7,195,764</u>
Liabilities			
Warrants and accounts payable	\$ 331,575	\$ --	\$ 331,575
Accrued liabilities	623,784	--	623,784
Total Liabilities	<u>955,359</u>	<u>--</u>	<u>955,359</u>
Fund Balances			
Nonspendable	74,250	--	74,250
Restricted	--	11,420	11,420
Committed	--	6,856	6,856
Assigned	1,122,734	--	1,122,734
Unassigned	5,024,575	--	5,024,575
Total Fund Balances	<u>6,221,559</u>	<u>18,276</u>	<u>6,239,835</u>
Total Liabilities and fund balances	<u>\$ 7,177,488</u>	<u>\$ 18,276</u>	<u>\$ 7,195,764</u>

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE
RECONCILIATION OF TOTAL GOVERNMENTAL FUND BALANCES
TO NET POSITION OF GOVERNMENTAL ACTIVITIES IN THE
STATEMENT OF NET POSITION

JUNE 30, 2025

<i>Total Governmental Fund Balances</i>	\$	6,239,835
Capital assets used in governmental activities are not financial resources and, therefore, are not reported in governmental funds.		1,252,096
Right to use leased assets used in governmental activities are not resources and, therefore, are not reported in the governmental funds.		1,354,661
Deferred outflows of resources related to OPEB to be recognized in OPEB expense in future periods.		738,273
Long-term liabilities are not due and payable in the current period, and therefore, are not reported in governmental funds:		
Lease liability		(1,544,374)
OPEB liability, net of related deferred outflows and inflows of resources		(2,457,344)
Compensated absences liability		(106,113)
Deferred inflows of resources related to OPEB to be recognized in OPEB expense in future periods.		<u>(1,833,314)</u>
<i>Net Position of Governmental Activities</i>	\$	<u>3,643,720</u>

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

**STATEMENT OF REVENUES, EXPENDITURES, AND CHANGES
IN FUND BALANCES – GOVERNMENTAL FUNDS**

FOR THE YEAR ENDED JUNE 30, 2025

	General Fund	Nonmajor Governmental Funds	Total Governmental Funds
Revenues			
School year program member tuition and fees	\$ 4,188,162	\$ --	\$ 4,188,162
School year program non-member tuition and fees	5,100,726	--	5,100,726
Summer program tuition and fees	633,374	--	633,374
Transportation assessments	5,810,488	--	5,810,488
Intergovernmental	1,723,463	8,830	1,732,293
Investment income	144,875	--	144,875
Miscellaneous	<u>1,034,732</u>	<u>6,250</u>	<u>1,040,982</u>
Total Revenues	<u>18,635,820</u>	<u>15,080</u>	<u>18,650,900</u>
Expenditures			
Program:			
Administration	943,783	--	943,783
Supervision	1,076,701	--	1,076,701
Instruction	6,956,648	14,401	6,971,049
Instructional rent	412,399	--	412,399
Instructional insurance and benefits	1,585,108	--	1,585,108
Transportation operating	6,318,163	--	6,318,163
Transportation capital outlay	<u>652,432</u>	<u>--</u>	<u>652,432</u>
Total Expenditures	<u>17,945,234</u>	<u>14,401</u>	<u>17,959,635</u>
Change in Fund Balance	690,586	679	691,265
Fund Balance, at Beginning of Year	<u>5,530,973</u>	<u>17,597</u>	<u>5,548,570</u>
Fund Balance, at End of Year	<u>\$ 6,221,559</u>	<u>\$ 18,276</u>	<u>\$ 6,239,835</u>

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

**RECONCILIATION OF THE STATEMENT OF REVENUES, EXPENDITURES,
AND CHANGES IN FUND BALANCES OF GOVERNMENTAL FUNDS
TO THE STATEMENT OF ACTIVITIES – GOVERNMENTAL FUNDS**

FOR THE YEAR ENDED JUNE 30, 2025

<i>Net Changes in Fund Balances - Total Governmental Funds</i>	\$ 691,265
Governmental funds report capital outlays as expenditures. However, in the Statement of Activities the cost of those assets is allocated over their estimated useful lives and reported as depreciation expense:	
Capital outlay	454,798
Right to use asset amortization	(261,273)
Depreciation	(403,056)
Some expenses reported in the Statement of Activities do not require the use of current financial resources and, therefore, are not reported as expenditures in the governmental funds:	
Repayment of lease liability	239,452
Decrease in OPEB expense from GASB 75	490,575
Change in compensated absences	<u>(89,784)</u>
<i>Change in Net Position of Governmental Activities</i>	<u>\$ 1,121,977</u>

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

**STATEMENT OF FIDUCIARY NET POSITION
FIDUCIARY FUND**

JUNE 30, 2025

	<u>OPEB Trust Fund</u>
Assets	
Investments:	
External investment pool	<u>\$ 6,171,222</u>
Net Position	
Restricted for OPEB purposes	<u>\$ 6,171,222</u>

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

**STATEMENT OF CHANGES IN FIDUCIARY NET POSITION
FIDUCIARY FUND**

FOR THE YEAR ENDED JUNE 30, 2025

	<u>OPEB Trust Fund</u>
Additions	
Investment income	\$ 539,489
Contributions from employer	<u>429,500</u>
Total Additions	968,989
Deductions	
Benefit payments to plan members	<u>389,500</u>
Net Increase	579,489
Net Position Restricted for OPEB	
Net position, at Beginning of Year	<u>5,591,733</u>
Net position, at End of Year	<u><u>\$ 6,171,222</u></u>

The accompanying notes are an integral part of these financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The accounting policies of the Concord Area Special Education Collaborative (the “Collaborative”) conform to accounting principles generally accepted in the United States of America (“GAAP”) as applicable to governmental units. The following is a summary of the significant policies of the Collaborative:

REPORTING ENTITY

The Collaborative is a municipal corporation governed by an appointed Board of Directors. As required by GAAP, these financial statements present the Collaborative and applicable component units for which the Collaborative is considered to be financially accountable. In fiscal year 2025, no entities met the criteria to be reported as component units.

GOVERNMENT-WIDE AND FUND FINANCIAL STATEMENTS

Government-Wide Financial Statements

The government-wide financial statements (i.e., the Statement of Net Position and the Statement of Activities) report information on all of the nonfiduciary activities of the primary government. The effect of interfund activity has been removed from these statements.

The Statement of Activities demonstrates the degree to which the direct expenses of a given function or segment are offset by program revenues. *Direct expenses* are those that are clearly identifiable with a specific function or segment. *Program revenues* include (1) charges to customers or applicants who purchase, use, or directly benefit from goods, services, or privileges provided by a given function or segment and (2) grants and contributions that are restricted to meeting the operational or capital requirements of a particular function or segment. Member and non-member tuition, assessments, and other items not properly included among program revenues are reported instead as *general revenues*.

Fund Financial Statements

Separate financial statements are provided for governmental funds and fiduciary funds, even though the latter are excluded from the government-wide financial statements. Major individual governmental funds are reported as separate columns in the fund financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

MEASUREMENT FOCUS, BASIS OF ACCOUNTING, AND FINANCIAL STATEMENT PRESENTATION

Government-Wide Financial Statements

The government-wide financial statements are reported using the *economic resources measurement focus* and the *accrual basis of accounting*. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows. Grants and similar items are recognized as revenue as soon as all eligibility requirements imposed by the provider have been met. As a general rule, the effect of interfund activity has been eliminated from the government-wide financial statements.

Amounts reported as *program revenues* include (1) charges to customers or applicants for goods, services, or privileges provided, (2) operating grants and contributions. Internally dedicated resources are reported as *general revenues* rather than as program revenues. Likewise, general revenues include all member and non-member program tuitions/fees and transportation assessments.

Fund Financial Statements

Governmental fund financial statements are reported using the *current financial resources measurement focus* and the *modified accrual basis of accounting*. Revenues are recognized as soon as they are both measurable and available. Revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. All other revenue items are considered to be measurable and available only when cash is received. Expenditures generally are recorded when a liability is incurred, as under accrual accounting. However, certain expenditures such as debt service, claims and judgments, compensated absences, OPEB, and pension are recorded only when payment is due.

The Collaborative reports the following major governmental fund:

- The *General Fund* is the Collaborative's primary operating fund. It accounts for all financial resources of the general government, except those required to be accounted for in another fund.

The fiduciary fund financial statements are reported using the *economic resources measurement focus* and the *accrual basis of accounting*. Under this method, revenues are recognized when earned and expenses are recorded when liabilities are incurred.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

The Collaborative reports the following fiduciary fund:

- The *Other Post-Employment Benefit Trust Fund* is used to accumulate resources for other post-employment health insurance benefits to be provided to eligible retirees.

CASH AND INVESTMENTS

Cash balances from all funds, except those required to be segregated by law, are combined to form a consolidation of cash. Cash balances are invested to the extent available, and interest earnings are recognized in the General Fund. Certain special revenue and fiduciary funds segregate cash, and investment earnings become a part of those funds.

Deposits with financial institutions consist primarily of demand deposits, certificates of deposits, savings accounts, and money market accounts. Generally, a cash and investment pool is maintained that is available for use by all funds. Each fund's portion of this pool is reflected on the financial statements under the caption "cash and short-term investments".

The Collaborative invests in the Massachusetts Municipal Depository Trust ("MMDT") Cash Portfolio, an external investment pool overseen by the Treasurer of the Commonwealth of Massachusetts. This cash portfolio meets the requirements of GASB Statement No. 79, *Certain External Investment Pools and Pool Participants*, where investments are valued at amortized cost, which approximates the net asset value of \$1 per share.

Investments are carried at fair value.

CAPITAL ASSETS

Capital assets, which include transportation vehicles, are reported in the applicable in the government-wide financial statements. Capital assets are defined by the Collaborative as assets with an initial individual cost of more than \$5,000 and an estimated useful life in excess of three years. Such assets are recorded at historical cost or estimated historical cost if purchased or constructed. Donated capital assets are recorded at acquisition value at the date of donation. The costs of normal maintenance and repairs that do not add to the value of the asset or materially extend assets' lives are not capitalized. Major outlays for capital assets and improvements are capitalized as projects are constructed. Capital assets are reviewed annually for impairment. No impairment losses were recognized during the fiscal year ended.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Capital assets are depreciated or amortized using the straight-line method over the following estimated useful lives:

<u>Assets</u>	<u>Years</u>
Vehicles	5
Right-to-use leases assets	10

LEASES

At the commencement of a lease, the Collaborative initially measures the lease liability at the present value of payments expected to be made during the lease term. Subsequently, the lease liability is reduced by the principal portion of lease payments made. The lease asset is initially measured as the initial amount of the lease liability, adjusted for lease payments made at or before the lease commencement date, plus certain initial direct costs. Subsequently, the lease asset is amortized on a straight-line basis over its useful life. The following assumptions are made:

The Collaborative uses its estimated incremental borrowing rate as the discount rate for leases.

The lease term includes the noncancellable period of the lease, including renewal terms reasonably certain to be exercised. Lease payments included in the measurement of the lease liability are composed of fixed payments and purchase option price, if the Collaborative is reasonably certain that it will be exercised.

The Collaborative monitors changes in circumstances that would require a remeasurement of its lease and will remeasure the lease asset and liability if certain changes occur that are expected to significantly affect the amount of the lease liability. Lease assets are reported with other capital assets and lease liabilities are reported with long-term debt on the statement of net position.

LONG-TERM OBLIGATIONS

In the government-wide financial statements, long-term debt and other long-term obligations are reported as liabilities.

In the fund financial statements, the face amount of governmental funds long-term debt is reported as other financing sources. Bond premiums and discounts, as well as issuance costs, are recognized in the current period. Bond premiums are reported as other financing sources and bond discounts are reported as other financing uses. Issuance costs, whether or not withheld from the actual bond proceeds received, are reported as administrative expenditures.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

FUND EQUITY

Fund equity at the governmental fund financial reporting level is classified as “fund balance”. Fund equity for all other reporting is classified as “net position”.

Fund Balance

Generally, fund balance represents the difference between current assets/deferred outflows and current liabilities/deferred inflows. The Collaborative has implemented GASB Statement No. 54, *Fund Balance Reporting and Governmental Fund Type Definitions*, which enhances the usefulness of fund balance information by providing clearer fund balance classifications that can be more consistently applied and by clarifying existing governmental fund type definitions, as follows:

- *Nonspendable* represents amounts that cannot be spent because they are either (1) not in spendable form or (2) legally or contractually required to be maintained intact. This fund balance classification includes General Fund reserves for security deposits.
- *Restricted* represents amounts that are restricted to specific purposes by constraints imposed by creditors, grantors, contributors, or laws or regulations of other governments, or constraints imposed by law through constitutional provisions or enabling legislation. This fund balance classification includes reserves from donations and state and Federal grant funds.
- *Committed* represents amounts that can only be used for specific purposes pursuant to constraints imposed by formal action of the Collaborative’s highest level of decision-making authority, which is the board of directors. This fund balance classification includes professional development resources that are accounted for in the Collaborative’s special revenue funds.
- *Assigned* represents amounts that are constrained by the Collaborative’s intent to use these resources for a specific purpose. This fund balance classification includes General Fund encumbrances that have been established by various Collaborative departments for the expenditure of current year budgetary financial resources upon vendor performance in the subsequent budgetary period.
- *Unassigned* represents amounts that are available to be spent in future periods. This fund balance classification includes program and transportation fund surplus balances.

When an expenditure is incurred that would qualify for payment from multiple fund balance types, the Collaborative uses the following order to liquidate liabilities: restricted, committed, assigned, and unassigned.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Net Position

Net position represents the difference between assets/deferred outflows and liabilities/deferred inflows. Net investment in capital assets, consists of capital assets, net of accumulated depreciation, reduced by the outstanding balances of any borrowing used for the acquisition, construction, or improvement of those assets. Net position is reported as restricted when there are limitations imposed on use either through enabling legislation adopted by the Collaborative or through external restrictions imposed by creditors, grantors, or laws or regulations of other governments. The remaining net position is reported as unrestricted.

USE OF ESTIMATES

The preparation of basic financial statements in conformity with GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosures for contingent assets and liabilities at the date of the basic financial statements and the reported amounts of revenues and expenditures/expenses during the fiscal year. Actual results could vary from estimates that were used.

NOTE 2 – STEWARDSHIP, COMPLIANCE, AND ACCOUNTABILITY

BUDGETARY INFORMATION

The Collaborative’s Board of Directors approves the annual school year program, summer program, and transportation budgets. School year and summer program budgets are based on anticipated enrollment and are funded by annually approved per pupil tuition rates for member and non-member entities. The transportation budget consists of estimated operating and capital costs and is funded by assessments based on the weighted average number of students transported two years previously in the month of June (i.e., fiscal year 2025 transportation assessments are based on the weighted average number of pupils transported in June 2023).

At year end, appropriation balances lapse and then may be reappropriated, as encumbrances which will be honored during the subsequent fiscal year.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

NOTE 3 – DEPOSITS AND INVESTMENTS

MGL Chapter 44, Section 55 place certain limitation on the nature of deposits and investments available to the Collaborative. Deposits, including demand deposits, money markets, certificates of deposits in any one financial institution, may not exceed 60% of the capital and surplus of such institution unless collateralized by the institution involved. Investments may be made in unconditionally guaranteed U.S. government obligations having maturities of a year or less from the date of purchase, or through repurchase agreements with maturities of no greater than 90 days in which the underlying securities consist of such obligations. Other allowable investments include certificates of deposits having a maturity date of up to 3 years from the date of purchase, national banks and MMDT has an average maturity of less than 1 year and is not rated or subject to custodial credit risk disclosure. MGL Chapter 44, Section 54 provides additional investment options for certain special revenue, trust, and OPEB funds.

DEPOSITS

Custodial Credit Risk

Custodial credit risk is the risk that in the event of bank failure, the Collaborative’s deposits may not be returned. The Collaborative does not have formal deposit policies related to the custodial credit risk of deposits.

As of June 30, 2025, the carrying amount of the Collaborative’s deposits totaled \$4,302,221, and the bank balance totaled of \$5,152,672. Of the bank balance, \$500,000 was covered by FDIC insurance, \$3,941,989 was collateralized, and \$710,683 was exposed to custodial credit risk because it was uninsured and uncollateralized.

INVESTMENTS

The following is a summary of the Collaborative’s Plan investments as of June 30, 2025:

<u>Investment Type</u>	<u>Amount</u>
MMDT - Cash portfolio	\$ 2,525,351
PRIT - Internal Investment Pool	<u>6,171,222</u>
Total investments	<u>\$ 8,696,573</u>

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

The custodial credit risk for Plan investments is the risk that, in the event of the failure of the counterparty (e.g., broker-dealer) to a transaction, the Plan will not be able to recover the value of its investment or collateral securities that are in possession of another party. The Plan does not have formal investment policies related to custodial credit risk.

As of June 30, 2025, the Plan did not have investments subject to custodial credit risk exposure.

Credit Risk – Investments in Debt Securities

Generally, credit risk is the risk that an issuer of an investment will not fulfill its obligations. The Plan does not have formal investment policies related to credit risk.

As of June 30, 2025, the credit quality ratings of the Plan’s debt securities were as follows:

<u>Investment Type</u>	<u>Amount</u>	<u>Rating as of Year End</u>
MMDT - Cash portfolio	\$ 2,525,351	\$ 2,525,351
PRIT - Internal Investment Pool	<u>6,171,222</u>	<u>6,171,222</u>
Total investments	<u>\$ 8,696,573</u>	<u>\$ 8,696,573</u>

Concentration of Credit Risk

Concentration of credit risk is the risk of loss attributable to the magnitude of the Plan’s investment in a single issuer. The Plan places no limit on the amount invested in any one issuer. The Plan does not have formal investment policies related to concentration of credit risk exposure.

As of June 30, 2025, the Plan did not have investments in any one issuer that exceeded 5% of total investments.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Interest Rate Risk – Investments in Debt Securities

Interest rate risk is the risk that changes in market interest rates will adversely affect the fair value of an investment. Generally, the longer the maturity of an investment, the greater the sensitivity of its fair value to changes in market interest rates. The Plan does not have formal investment policies limiting investment maturities as a means of managing its exposure to fair value losses arising from increasing interest rates.

Credit Risk – Investments in Debt Securities

Foreign currency risk is the risk that changes in foreign exchange rates will adversely affect the fair value of an investment. The Plan does not have formal investment policies related to foreign currency risk.

At June 30, 2025, none of the Plan's investments were exposed to foreign currency risk.

Fair Value

The Plan categorizes its fair value measurements within the fair value hierarchy established by Governmental Accounting Standards Board Statement No. 72, *Fair Value Measurement and Application* (GASB 72). Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date.

The hierarchy is based on the valuation inputs used to measure the fair value of an asset or liability and give the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements). The hierarchy categorizes the inputs to valuation techniques used for fair value measurement into three levels as follows:

- Level 1 – inputs that reflect quoted prices (unadjusted) in active markets for identical assets or liabilities that are accessible at the measurement date.
- Level 2 – inputs other than quoted prices that are observable for an asset or liability either directly or indirectly, including inputs in markets that are not considered to be active. Because they must often be priced on the basis of transactions involving similar but not identical securities or do not trade with sufficient frequency, certain directly held securities are categorized as Level 2.
- Level 3 – unobservable inputs based on the best information available, using assumptions in determining the fair value of investments and derivative instruments.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

In instances where inputs used to measure fair value fall into different levels in the fair value hierarchy, fair value measurements in their entirety are categorized based on the lowest level input that is significant to the valuation.

The Collaborative did not have any investments subject to the fair value level classification as of June 30, 2025. The Collaborative's investments in the PRIT Internal Investment Pool are measured at net asset value (NAV). The fair value of these investments has been determined using the NAV as a practical expedient and has not been categorized within the fair value hierarchy (Level 1, Level 2, or Level 3). Practical expedient is not used when the investment would be expected to sell at a value different from the NAV. The Collaborative's investments in the MMDT cash portfolio are measured at amortized cost.

NOTE 4 – ACCOUNTS RECEIVABLE

Accounts receivable represents tuition due from member and non-member communities for services rendered in fiscal year 2025.

NOTE 5 – CAPITAL ASSETS

Capital asset activity for the year ended June 30, 2025 was as follows:

	Beginning Balance	Increases	Decreases	Ending Balance
Capital assets, Being Depreciated/Amortized:				
Vehicles	\$ 4,344,503	\$ 454,798	\$ --	\$ 4,799,301
Right to use assets (office suites)	<u>2,399,753</u>	<u>--</u>	<u>--</u>	<u>2,399,753</u>
Total Capital Assets, Being Depreciated/Amortized	<u>6,744,256</u>	<u>454,798</u>	<u>--</u>	<u>7,199,054</u>
Less Accumulated Depreciation Amortization For:				
Vehicles	(3,144,149)	(403,056)	--	(3,547,205)
Right to use assets (office suites)	<u>(783,819)</u>	<u>(261,273)</u>	<u>--</u>	<u>(1,045,092)</u>
Total Accumulated Depreciation/Amortization	<u>(3,927,968)</u>	<u>(664,329)</u>	<u>--</u>	<u>(4,592,297)</u>
Capital Assets, Net	<u>\$ 2,816,288</u>	<u>\$ (209,531)</u>	<u>\$ --</u>	<u>\$ 2,606,757</u>

Depreciation and amortization expense was charged to functions of the Collaborative as follows during fiscal year 2024:

Transportation \$664,329

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

NOTE 6 – DEFERRED OUTFLOWS OF RESOURCES

Deferred outflows of resources represent the consumption of net assets by the Collaborative that apply to future reporting periods. Deferred outflows of resources have a positive effect on net position, similar to assets. Deferred outflows of resources related to OPEB, in accordance with GASB Statements No. 75, are more fully discussed in the corresponding OPEB note.

NOTE 7 – ACCRUED LIABILITIES

Accrued liabilities are comprised of accrued payroll as of June 30, 2025.

NOTE 8 – LEASE OBLIGATIONS

The Collaborative is the lessee of office spaces under leases expiring in various years through 2031. The future principal and interest lease payments as of June 30, 2025, were as follows:

Fiscal Year Ending June 30,	Principal	Interest	Total
2026	\$ 257,491	\$ 93,198	\$ 350,689
2027	276,139	84,816	360,955
2028	295,417	75,813	371,230
2029	315,347	66,170	381,517
2030	399,980	90,869	490,849
	<u>\$ 1,544,374</u>	<u>\$ 410,866</u>	<u>\$ 1,955,240</u>

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

NOTE 9 – LONG-TERM LIABILITIES

CHANGES IN LONG-TERM LIABILITIES

During the year ended June 30, 2025, the following changes occurred in long-term liabilities:

	Beginning Balance	Additions	Reductions	Ending Balance	Less Current Portion	Equals Long-Term Portion
Governmental Activities						
Leases	\$ 1,783,826	\$ --	\$ (239,452)	\$ 1,544,374	\$ (257,491)	\$ 1,286,883
Compensated absences	16,329	--	--	16,329	--	16,329
Net OPEB liability	2,636,905	--	(179,561)	2,457,344	--	2,457,344
	<u>\$ 4,437,060</u>	<u>\$ --</u>	<u>\$ (419,013)</u>	<u>\$ 4,018,047</u>	<u>\$ (257,491)</u>	<u>\$ 3,760,556</u>

NOTE 10 – DEFERRED INFLOWS OF RESOURCES

Deferred inflows of resources represent the acquisition of net assets by the Collaborative that apply to future reporting periods. Deferred inflows of resources have a negative effect on net position, similar to liabilities. Deferred inflows of resources related to OPEB, in accordance with GASB Statement No. 75, will be recognized as revenue in future years and are more fully described in the corresponding OPEB note.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

NOTE 11 – GOVERNMENTAL FUNDS – FUND BALANCES

The Collaborative's fund balances at June 30, 2025 are comprised of the following:

	General Fund	Nonmajor Governmental Funds	Total Governmental Funds
	<u> </u>	<u> </u>	<u> </u>
Nonspendable			
Security deposit	\$ 74,250	\$ --	\$ 74,250
Restricted			
Donation fund	--	10,599	10,599
State and federal grants	<u> </u>	<u> </u>	<u> </u>
	--	821	821
Total Restricted	<u> </u>	<u> </u>	<u> </u>
	--	11,420	11,420
Committed			
Professional development	<u> </u>	<u> </u>	<u> </u>
	--	6,856	6,856
Assigned			
Encumbrances:			
School Program	67,059	--	67,059
Transportation	<u> </u>	<u> </u>	<u> </u>
	1,055,675	--	1,055,675
Total Assigned	<u> </u>	<u> </u>	<u> </u>
	1,122,734	--	1,122,734
Unassigned			
General fund	<u> </u>	<u> </u>	<u> </u>
	5,024,575	--	5,024,575
Total Fund Balance	<u> </u>	<u> </u>	<u> </u>
	\$ 6,221,559	\$ 18,276	\$ 6,239,835

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

NOTE 12 – MASSACHUSETTS STATE EMPLOYEES’ RETIREMENT SYSTEM (MSERS)

PLAN DESCRIPTION

The Massachusetts State Employees’ Retirement System (“MSERS”) is a public employee retirement system (“PERS”) that administers a cost-sharing, multi-employer, defined benefit plan as defined by Governmental Accounting Standards Board (“GASB”) Statement No. 67, *Financial Reporting for Pension Plans*. MSERS covers substantially all employees of the Commonwealth and certain employees of the independent authorities and agencies. The financial report may be obtained by visiting <https://www.macomptroller.org/gasb-68-reports/>. Management of MSERS is vested in the Massachusetts State Retirement Board (“MSRB”), which consists of five members—two elected by current and active MSERS members, one by the remaining members of the MSRB, one who is appointed by the State Treasurer and the State Treasurer, who serves as ex-officio and is the Chair of the MSRB.

PARTICIPANT RETIREMENT BENEFITS

MSERS provides retirement, disability, survivor, and death benefits to members and their beneficiaries. MGL establishes uniform benefit and contribution requirements for all contributory PERS. These requirements provide for superannuation retirement allowance benefits up to a maximum of 80% of a member’s highest 3-year average annual rate of regular compensation. For employees hired after April 1, 2012, retirement allowances are calculated on the basis of the last 5 years or any 5 consecutive years, whichever is greater in terms of compensation. Benefit payments are based upon a member’s age, length of creditable service, group creditable service, and group classification. The authority for amending these provisions rests with the Legislature.

Members become vested after ten years of creditable service. A superannuation, or regular payment made into a fund by an employee toward a future pension, retirement allowance may be received upon the completion of 20 years of creditable service or upon reaching the age of 55 with 10 years of service. Normal retirement for most employees occurs at age 65; for certain hazardous duty and public safety positions, normal retirement is at age 55. Most employees who joined the system after April 1, 2012 cannot retire prior to age 60.

MSERS’ funding policies have been established by Chapter 32 of the MGL and the State Legislature has the authority to amend these policies. The annuity portion of the MSERS retirement allowance is funded by employees, who contribute a percentage of their regular compensation. Costs of administering the plan are funded out of plan assets.

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NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

PARTICIPANT CONTRIBUTIONS

Member contributions for MSERS vary depending on the most recent date of membership:

<u>Membership Date</u>	<u>% of Compensation</u>
Prior to 1975	5% of regular compensation
1975 to 1983	7% of regular compensation
1984 to 6/30/1996	8% of regular compensation
7/1/1996 to present	9% of regular compensation except for State Police which is 12% of regular compensation
1979 to present	An additional 2% of regular compensation in excess of \$30,000

ACTUARIAL ASSUMPTIONS

The total pension liability is measured as of June 30, 2024 and was determined by an actuarial valuation as of January 1, 2024 rolled forward to June 30, 2024. This valuation used the following assumptions:

- (a) 2.5% inflation rate, (b) 7.00% investment rate of return, (c) 3.50% interest rate credited to the annuity savings fund and (d) 3.00% cost of living increase on the first \$13,000 per year.
- Salary increases are based on analyses of past experience but range from 4.00% to 9.00% depending on group and length of service.
- Mortality rates were as follows:
 - Pre-retirement – reflects RP-2014 Blue Collar Employees table projected generationally with Scale MP-2021, set forward 1 year for females.
 - Post-retirement – reflects RP-2014 Blue Collar Healthy Annuitant table projected generationally with Scale MP-2021, set forward 1 year for females.
 - Disability – the mortality rate reflects RP-2014 Blue Collar Healthy Annuitant table projected generationally with Scale MP-2021, set forward 1 year.
- Experience studies were performed as follows:
 - Dated February 27, 2014 and encompasses the period January 1, 2006 to December 31, 2011, updated to reflect actual experience from 2012 through 2016 for post-retirement mortality.

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NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Investment assets of the MSERS are with the Pension Reserves Investment Trust (“PRIT”) Fund. The long-term expected rate of return on pension plan investments was determined using a building-block method in which best-estimate ranges of expected future rates of return are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighting the expected future rates of return by the target asset allocation percentage. Best estimates of geometric rates of return for each major asset class included in the PRIT Fund’s target asset allocation as of June 30, 2024 are summarized in the following table:

<u>Asset Class</u>	<u>Target Allocation</u>	<u>Long-Term Expected Real Rate of Return</u>
Global equity	36.00%	4.60%
Core fixed income	15.00%	2.10%
Private equity	16.00%	7.40%
Portfolio completion strategies	10.00%	3.70%
Real estate	10.00%	3.90%
Value added fixed income	9.00%	5.10%
Timber/natural resources	4.00%	4.40%
	<u>100.00%</u>	

DISCOUNT RATE

The discount rate used to measure the total pension liability was 7.00%. The projection of cash flows used to determine the discount rate assumed that plan member contributions will be made at the current contribution rates and the Commonwealth’s contributions will be made at rates equal to the difference between actuarially determined contribution rates and the member rates. Based on those assumptions, the net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

SENSITIVITY ANALYSIS

The following illustrates the sensitivity of the collective net pension liability to changes in the discount rate. In particular, the table presents the Collaborative’s share of the MSERS collective net pension liability assuming it was calculated using a single discount rate that is one-percentage-point lower or one-percentage-point higher than the current discount rate:

1% Decrease (6.00%)	Current Discount Rate (7.00%)	1% Increase (8.00%)
\$ 12,424,328	\$ 9,821,663	\$ 5,814,591

SPECIAL FUNDING SITUATION – EDUCATIONAL COLLABORATIVES

A special funding situation was created by MGL for all educational collaboratives in the Commonwealth. Collaboratives contribute amounts equal to the normal cost of non-teaching employees’ benefits at a rate established by the Public Employees’ Retirement Administration Commission (“PERAC”), currently 6.10% of covered payroll. Legally, the Collaboratives are only responsible for contributing the annual normal cost of their employees’ benefits (i.e., the present value of benefits earned by those employees in any given year) and are not legally responsible for the past service cost attributable to those employees or previously retired employees of the Collaboratives. Therefore, the Collaborative does not have a net pension liability. The Collaborative’s required contribution to MSERS equaled its actual contribution for the year ended June 30, 2024, was \$245,811.

NOTE 13 – MASSACHUSETTS TEACHERS’ RETIREMENT SYSTEM (MTRS)

PLAN DESCRIPTION

The Massachusetts Teachers’ Retirement System (“MTRS”) is a public employee retirement system (“PERS”) that administers a cost-sharing, multi-employer, defined benefit plan, as defined in Governmental Accounting Standards Board (“GASB”) Statement No. 67, *Financial Reporting for Pension Plans*. MTRS is managed by the Commonwealth of Massachusetts on behalf of municipal teachers and municipal teacher retirees. The Commonwealth of Massachusetts is a nonemployer contributor and is responsible for all contributions and future benefit requirements of the MTRS. The MTRS covers certified teachers in cities (except Boston), towns, regional school districts, charter schools, educational collaboratives, and Quincy College. The MTRS is part of the Commonwealth of Massachusetts’ reporting entity and does not issue a standalone audited financial report.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Management of MTRS is vested in the Massachusetts Teachers' Retirement Board ("MTRB"), which consists of seven members—two elected by the MTRS members, one who is chosen by the six other MTRB members, the State Treasurer (or their designee), the State Auditor (or their designee), a member appointed by the Governor, and the Commissioner of Education (or their designee), who serves ex-officio as the Chairman of the MTRB.

BENEFITS PROVIDED

MTRS provides retirement, disability, survivor, and death benefits to members and their beneficiaries. MGL establish uniform benefit and contribution requirements for all contributory PERS. These requirements provide for regular payment of retirement allowance benefits up to a maximum of 80% of a member's highest 3-year average annual rate of regular compensation. For employees hired after April 1, 2012, retirement allowances are calculated on the basis of the last 5 years or any 5 consecutive years, whichever is greater in terms of compensation. Benefit payments are based upon a member's age, length of creditable service, and group creditable service and group classification. The authority for amending these provisions rests with the Legislature.

Members become vested after 10 years of creditable service. A regular payment of retirement allowance may be received upon the completion of 20 years of creditable service or upon reaching the age of 55 with 10 years of service. Normal retirement for most employees occurs at age 65. Most employees who joined the system after April 1, 2012 cannot retire prior to age 60.

The MTRS' funding policies have been established by Chapter 32 of the MGL. The Legislature has the authority to amend these policies. The annuity portion of the MTRS retirement allowance is funded by employees who contribute a percentage of their regular compensation. Costs of administering the plan are funded out of plan assets.

CONTRIBUTIONS

Member contributions for MTRS vary depending on the most recent date of membership:

<u>Membership Date</u>	<u>% of Compensation</u>
Prior to 1975	5% of regular compensation
1975 to 1983	7% of regular compensation
1984 to 6/30/1996	8% of regular compensation
7/1/1996 to present	9% of regular compensation
7/1/2001 to present	11% of regular compensation (for teachers hired after 7/1/01 and those accepting provisions of Chapter 114 of the Acts of 2000)
1979 to present	An additional 2% of regular compensation in excess of \$30,000

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NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

In addition, members who join MTRS on or after April 2, 2012 will have their withholding rates reduced to 8% for those participating in retirement, otherwise the withholdings are reduced to 6% plus 2% on earnings over \$30,000 a year after achieving 30 years of creditable service.

ACTUARIAL ASSUMPTIONS

The net pension liability for the June 30, 2024 measurement date was determined by an actuarial valuation as of January 1, 2024 rolled forward to June 30, 2024. This valuation used the following assumptions:

- (a) 2.5% inflation rate, (b) 7.00% investment rate of return, (c) 3.50% interest rate credited to the annuity savings fund and (d) 3.00% cost of living increase on the first \$13,000 per year.
- Salary increases are based on analyses of past experience but range from 4.00% to 7.50% depending on length of service.
- Experience study is dated July 21, 2014 and encompasses the period January 1, 2006 to December 31, 2011, updated to reflect post-retirement mortality from 2012 – 2020.

Mortality rates were as follows:

- Pre-retirement – reflects SOA Pub-2010 Teachers Employees mortality table (headcount weighted) projected generationally with Scale MP-2021 (gender distinct).
- Post-retirement – reflects SOA Pub-2010 Teachers Retirees mortality table (headcount weighted) projected generationally with Scale MP-2021 (gender distinct).
- Disability – assumed to be in accordance with the SOA Pub-2010 Teachers Retirees Mortality Table (headcount weighted) projected generationally with Scale MP-2021 (gender distinct).

TARGET ALLOCATIONS

Investment assets of the MTRS are with the PRIT Fund. The long-term expected rate of return on pension plan investments was determined using a building-block method in which best-estimate ranges of expected future rates of return are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighting the expected future rates of return by the target asset allocation percentage. Best estimates of geometric rates of return for each major asset class included in the PRIT Fund's target asset allocation as of June 30, 2024 are summarized in the following table:

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

<u>Asset Class</u>	<u>Target Allocation</u>	<u>Long-Term Expected Real Rate of Return</u>
Global equity	36.00%	4.60%
Core fixed income	15.00%	2.10%
Private equity	16.00%	7.40%
Portfolio completion strategies	10.00%	3.70%
Real estate	10.00%	3.90%
Value added fixed income	9.00%	5.10%
Timber/natural resources	<u>4.00%</u>	4.40%
	<u>100.00%</u>	

DISCOUNT RATE

The discount rate used to measure the total pension liability was 7.00%. The projection of cash flows used to determine the discount rate assumed that plan member contributions will be made at the current contribution rates and the Commonwealth of Massachusetts' contributions will be made at rates equal to the difference between actuarially determined contribution rates and the member rates. Based on those assumptions, the net position was projected to be available to make all projected future benefit payments of current plan members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

SENSITIVITY ANALYSIS

The following illustrates the sensitivity of the collective net pension liability to changes in the discount rate. In particular, the table presents the MTRS collective net pension liability assuming it was calculated using a single discount rate that is one percentage-point lower or one percentage-point higher than the current discount rate (amounts in thousands):

<u>1% Decrease (6.00%)</u>	<u>Current Discount Rate (7.00%)</u>	<u>1% Increase (8.00%)</u>
\$ 32,776,000	\$ 25,356,461	\$ 19,080,000

SPECIAL FUNDING SITUATION

The Commonwealth is a nonemployer contributor and is required by statute to make 100% of all actuarially determined employer contributions on behalf of the Collaborative's teachers and retired teachers to the MTRS. Therefore, the Collaborative is considered to be in a special funding situation as defined by GASB Statement No. 68, *Accounting and Financial Reporting for Pensions* and the Commonwealth is a nonemployer contributor in MTRS. Since the

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Collaborative does not contribute directly to the MTRS, the Collaborative does not have a net pension liability. The total of the Commonwealth provided contributions have been allocated based on each employer's covered payroll to the total covered payroll of employers in the MTRS as of the measurement date of June 30, 2024. The Collaborative's portion of the collective pension expense, contributed by the Commonwealth, of \$1,023,170 is reported in the General Fund as intergovernmental revenue and pension expense in the current fiscal year. The portion of the Commonwealth's collective net pension liability associated with the Collaborative is \$10,731,586 as of the measurement date.

NOTE 14— OTHER POST-EMPLOYMENT BENEFITS

The Collaborative follows GASB Statement No. 74, *Financial Reporting for Postemployment Benefit Plans Other Than Pension Plans (OPEB)*. This applies if a trust fund has been established to fund future OPEB costs. In fiscal year 2010, the Collaborative established a single-employer defined benefit OPEB Trust Fund to provide funding for future employee health care costs. The OPEB Trust Fund does not issue a stand-alone financial report.

The Collaborative also follows GASB Statement No. 75, *Accounting and Financial Reporting for Postemployment Benefits Other Than Pensions*. This statement establishes standards for recognizing and measuring liabilities, deferred outflows of resources, deferred inflows of resources, and expense/expenditures. This statement identifies the methods and assumptions that are required to be used to project benefit payments, discounted projected benefit payments to their actuarial present value, and attribute that present value to periods of employee service.

All the following OPEB disclosures are based on a measurement date of June 30, 2025.

GENERAL INFORMATION ABOUT THE OPEB PLAN

Plan Description

The Collaborative provides post-employment healthcare benefits for retired employees through the Collaborative's plan. The Collaborative provides health insurance coverage through Fallon Direct Care, Fallon Select Care, Harvard Pilgrim Health Care, and Tufts Health Plan. The benefits, benefit levels, employee contributions, and employer contributions are governed by Chapter 32 of Massachusetts General Laws.

Benefits Provided

The Collaborative provides medical and prescription drug insurance to retirees and their covered dependents. All active employees who retire from the Collaborative and meet the eligibility criteria will receive these benefits.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Funding Policy

The Collaborative's funding policy includes financing the implicit subsidy on a pay-as-you-go basis, as required by statute. Additional contributions are based on actuarially determined amounts or annual budget limitations/authorizations.

Plan Membership

At June 30, 2025, the following employees were covered by the benefit terms:

Inactive employees or beneficiaries currently receiving benefit payments	75
Active employees	<u>160</u>
	<u>235</u>

INVESTMENTS

The OPEB trust fund assets consist of its participation in a State Investment Pool.

Rate of Return

For the year ended June 30, 2025, the annual money-weighted rate of return on investments, net of investment expense, was 9.64%. The money-weighted rate of return expresses investment performance, net of investment expense, adjusted for the changing amounts actually invested.

ACTUARIAL ASSUMPTIONS AND OTHER INPUTS

The net OPEB liability was determined by an actuarial valuation as of July 1, 2024 using the following actuarial assumptions, applied to all periods included in the measurement, unless otherwise specified:

Inflation	2.50%, net of OPEB plan investment expense
Salary increases	3.00% annually as of June 30, 2025 and for future periods
Investment rate of return	6.47%, net of OPEB plan investment expense
Municipal bond rate	4.81% as of June 30, 2025
Discount rate	6.97%, net of OPEB plan investment expense
Healthcare cost trend rates	4.96% for June 2025, fluctuating 0.04-0.50% for an ultimate rate of 3.63% in 2060
Retirees' share of benefit-related costs	50%
Participation rate	80%

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Pre-retirement mortality for general employees reflects RP-2014 Mortality Table for Blue Collar Employees projected generationally with scale MP-2021, set forward 1 year for females. Pre-retirement mortality for teachers reflects PubT-2010 Mortality Table (Headcount-weighted) for Employees projected generationally with scale MP-2021. Post-retirement mortality for general employees reflects RP-2014 Mortality Table for Blue Collar Healthy Annuitants projected generationally with scale MP-2021, set forward 1 year for females. Post-retirement mortality for teachers reflects PubT-2010 Mortality Table (Headcount weighted) for Healthy Annuitants projected generationally with scale MP-2021. Disabled mortality for general employees reflects RP-2014 Mortality Table for Blue Collar Healthy Annuitants projected generationally with scale MP-2021, set forward 1 year for males and 2 years for females. Disabled mortality for teachers reflects PubT-2010 Mortality Table (Headcount-weighted) for Healthy Annuitants projected generationally with scale MP-2021.

The actuarial assumptions used in the valuation were based on the results of an actuarial experience studies of the Massachusetts PERAC issued in 2014 and their most recent analysis of retiree mortality during 2015 and 2016.

TARGET ALLOCATIONS

The long-term expected rate of return on OPEB plan investments was determined using a building-block method in which best-estimate ranges of expected future real rates of return (expected returns, net of investment expense and inflation) are developed for each major asset class. These ranges are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation. Best estimates of arithmetic real rates of return for each major asset class included in the target asset allocation as of June 30, 2025 are summarized in the following table:

Asset Class	Target Asset Allocation	Long-term Expected Real Rate of Return
Domestic Equity - Large Cap	14.50%	4.52%
Domestic Equity - Small/Mid Cap	3.50%	5.06%
International Equity - Developed Market	16.00%	5.08%
International Equity - Emerging Market	6.00%	5.80%
Domestic Fixed Income	20.00%	2.44%
International Fixed Income	3.00%	2.13%
Alternatives	23.00%	6.09%
Real Estate	14.00%	3.73%
	<u>100.00%</u>	

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

In addition to the implicit subsidy contribution, the Collaborative's policy is to contribute the actuarially determined contribution or amounts provided annually by the budget.

DISCOUNT RATE

The discount rate used to measure the net OPEB liability was 6.46% at June 30, 2025. The projection of cash flows used to determine the discount rate assumed that contributions from plan members will be made at the current contribution rate.

Based on those assumptions, the OPEB plan fiduciary net position was projected to be available to make all projected future benefit payments of current plan members.

Net OPEB Liability

The components of the net OPEB liability, measured as of June 30, 2025, were as follows:

Total OPEB liability	\$	8,628,566
Plan fiduciary net position		<u>6,171,222</u>
Net OPEB liability	\$	<u>2,457,344</u>
Plan fiduciary net position as a percentage of the total OPEB liability		71.52%

The fiduciary net position has been determined on the same basis used by the OPEB plan. For this purpose, the plan recognizes benefit payments when due and payable.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

CHANGES IN THE NET OPEB LIABILITY

The following summarizes the changes in the net OPEB liability for the past year:

	Increase (Decrease)		
	Total OPEB Liability (a)	Plan Fiduciary Net Position (b)	Net OPEB Liability (a) - (b)
Balances, Beginning of Year	\$ 8,228,638	\$ 5,591,733	\$ 2,636,905
Changes for the year:			
Service cost	300,668	--	300,668
Interest	581,147	--	581,147
Contributions - employer	--	429,500	(429,500)
Net investment income	--	539,489	(539,489)
Differences between expected and actual experience	(398,423)	--	(398,423)
Changes in assumptions	306,036	--	306,036
Benefit payments	(389,500)	(389,500)	--
Net Changes	399,928	579,489	(179,561)
Balances, End of Year	\$ 8,628,566	\$ 6,171,222	\$ 2,457,344

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

Changes of assumptions and other inputs reflect a change in the discount rate from 6.97% in 2024 to 6.46% in 2025.

SENSITIVITY OF THE NET OPEB LIABILITY TO CHANGES IN THE DISCOUNT RATE

The following presents the net OPEB liability, as well as what the net OPEB liability would be if it were calculated using a discount rate that is one percentage-point lower or one percentage-point higher than the current discount rate:

1% Decrease (5.46%)	Current Discount Rate (6.46%)	1% Increase (7.46%)
<u>\$ 3,557,623</u>	<u>\$ 2,457,344</u>	<u>\$ 1,548,006</u>

SENSITIVITY OF THE NET OPEB LIABILITY TO CHANGES IN THE HEALTHCARE COST TREND RATES

The following presents the net OPEB liability, as well as what the net OPEB liability would be if it were calculated using healthcare cost trend rates that are one percentage-point lower or one percentage-point higher than the current healthcare cost trend rates:

1% Decrease (3.96%)	Current Healthcare Cost Trend Rates (4.96%)	1% Increase (5.96%)
<u>\$ 1,458,368</u>	<u>\$ 2,457,344</u>	<u>\$ 3,655,143</u>

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

OPEB EXPENSE AND DEFERRED OUTFLOWS OF RESOURCES AND DEFERRED INFLOWS OF RESOURCES RELATED TO OPEB

For the year ended June 30, 2025, the Collaborative recognized an OPEB expense of \$(61,075). At June 30, 2025, the Collaborative reported deferred outflows and inflows of resources related to OPEB from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Difference between expected and actual experience	\$ --	\$ (1,313,914)
Change in assumptions	738,273	(421,252)
Net difference between projected and actual OPEB investment earnings	<u>--</u>	<u>(98,148)</u>
	<u>\$ 738,273</u>	<u>\$ (1,833,314)</u>

Amounts reported as deferred outflows and inflows of resources related to OPEB will be recognized as decreases in OPEB expense as follows:

Year Ended June 30:

2025	\$ (338,469)
2026	(323,320)
2027	(303,856)
2028	(111,879)
2029	(14,974)
Thereafter	<u>(2,543)</u>
	<u>\$ (1,095,041)</u>

NOTE 15— COMMITMENTS AND CONTINGENCIES

OUTSTANDING LEGAL ISSUES

On an ongoing basis, there are typically pending legal issues in which the Collaborative is involved. The Collaborative's management is of the opinion that the potential future settlement of these issues would not materially affect its financial statements taken as a whole.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2025

GRANTS

Amounts received or receivable from grantor agencies are subject to audit and adjustment by grantor agencies, principally the federal government. Any disallowed claims, including amounts already collected, may constitute a liability of the applicable funds. The amount of expenditures which may be disallowed by the grantor cannot be determined at this time, although the Collaborative expects such amounts, if any, to be immaterial.

ENCUMBRANCES

At year-end, the Collaborative's General Fund has \$1,122,734 in encumbrances that will be liquidated in the next fiscal year.

NOTE 16– IMPLEMENTATION OF NEW GASB PRONOUNCEMENTS

During 2025, the following GASB pronouncements were implemented:

- GASB Statement #101, *Compensated Absences*. The Town implemented GASB 101 in 2025. This pronouncement did not impact the basic financial statements.
- GASB Statement #102, *Certain Risk Disclosures*. This pronouncement did not impact the basic financial statements.

The following GASB pronouncements will be implemented in the future:

- The GASB issued Statement #103, *Financial Reporting Model Improvements*, which is required to be implemented for fiscal years beginning after June 15, 2025.
- The GASB issued Statement #104, *Disclosure of Certain Capital Assets*, which is required to be implemented for fiscal years beginning after June 15, 2025.

Management is currently assessing the impact the implementation of these pronouncements will have on the basic financial statements.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

REQUIRED SUPPLEMENTARY INFORMATION SCHEDULE OF REVENUES, EXPENDITURES AND OTHER FINANCING SOURCES (USES) – BUDGET AND ACTUAL – GENERAL FUND (Unaudited)

FOR THE YEAR ENDED JUNE 30, 2025

	Budgeted Amounts		Actual Amounts	Amounts Carried Forward To Next Year	Variance to Final Budget
	Original Budget	Final Budget			
Revenues					
School year program member tuition and fees	\$ 4,273,225	\$ 4,273,225	\$ 4,188,162	\$ --	\$ (85,063)
School year program non-member tuition and fees	4,416,165	4,416,165	5,100,726	--	684,561
Summer program tuition and fees	643,723	643,723	633,374	--	(10,349)
Transportation assessments	5,810,488	5,810,488	5,810,488	--	--
Investment income	152,500	152,500	144,875	--	(7,625)
Miscellaneous	498,998	498,998	1,034,732	--	535,734
Total Revenues	<u>15,795,099</u>	<u>15,795,099</u>	<u>16,912,357</u>	<u>--</u>	<u>1,117,258</u>
Expenditures					
Program:					
Administration	737,145	737,145	906,884	--	(169,739)
Supervision	1,197,636	1,197,636	1,063,557	--	134,079
Instruction	7,007,200	7,007,200	6,956,648	67,059	(16,507)
Instructional rent	405,213	405,213	412,399	--	(7,186)
Instructional insurance and benefits	711,883	711,883	561,938	--	149,945
Transportation operating	7,417,973	7,417,973	6,320,345	1,055,675	41,953
Total Expenditures	<u>17,477,050</u>	<u>17,477,050</u>	<u>16,221,771</u>	<u>1,122,734</u>	<u>132,545</u>
Excess (Deficiency) of Revenues over Expenditures	(1,681,951)	(1,681,951)	690,586	(1,122,734)	1,249,803
Other Financing Sources					
Use of prior year reserves	1,253,265	1,253,265	--	--	(1,253,265)
Voted use of Cumulative Surplus	428,686	428,686	--	--	(428,686)
Total Other Financing Sources	<u>1,681,951</u>	<u>1,681,951</u>	<u>--</u>	<u>--</u>	<u>(1,681,951)</u>
Net Change in Fund Balance	--	--	690,586	(1,122,734)	(432,148)
Budgetary Fund Balance, Beginning of Year	<u>17,477,050</u>	<u>17,477,050</u>	<u>5,530,973</u>	<u>--</u>	<u>(564,693)</u>
Budgetary Fund Balance, End of Year	<u>\$ 17,477,050</u>	<u>\$ 17,477,050</u>	<u>\$ 6,221,559</u>	<u>\$ (1,122,734)</u>	<u>\$ (996,841)</u>

See independent auditors' report and notes to required supplementary information.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

NOTES TO REQUIRED SUPPLEMENTARY INFORMATION FOR GENERAL FUND BUDGET

FOR THE YEAR ENDED JUNE 30, 2025

BUDGETARY BASIS

The General Fund final appropriation appearing on the previous page represents the final amended budget after all reserve fund transfers and supplemental appropriations.

BUDGET/GAAP RECONCILIATION

The budgetary data for the General Fund is based upon accounting principles that differ from GAAP. Therefore, in addition to the GAAP basis financial statements, the results of operations of the General Fund are presented in accordance with budgetary accounting principles to provide a meaningful comparison to budgetary data.

The following is a summary of adjustments made to the actual revenues, expenditures, and other financing sources (uses), to conform to the budgetary basis of accounting.

	<u>Revenues</u>	<u>Expenditures</u>
GAAP Basis	\$ 18,635,820	\$ 17,945,234
Reverse MSERS and MTRS on-behalf contributions	<u>(1,723,463)</u>	<u>(1,723,463)</u>
Budgetary Basis	<u>\$ 16,912,357</u>	<u>\$ 16,221,771</u>

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

REQUIRED SUPPLEMENTARY INFORMATION SCHEDULE OF PROPORTIONATE SHARE OF THE NET PENSION LIABILITY *(for the past ten years)*

Massachusetts State Employees' Retirement System								
Fiscal Year	Measurement Date	Proportion of the Net Pension Liability	Proportionate Share of the Net Pension Liability	Commonwealth of Massachusetts' Total Proportionate Share of the Net Pension Liability Associated with the Collaborative	Total Net Pension Liability Associated with the Collaborative	Covered Payroll	Proportionate Share of the Net Pension Liability as a Percentage of Covered Payroll	Plan Fiduciary Net Position Percentage of the Total Pension Liability
June 30, 2025	June 30, 2024	0.06261%	\$ --	\$ 8,844,429	\$ 8,844,429	\$ 5,457,109	-	72.90%
June 30, 2024	June 30, 2023	0.06705%	\$ --	\$ 9,821,663	\$ 9,821,663	\$ 4,402,898	-	70.71%
June 30, 2023	June 30, 2022	0.06356%	\$ --	\$ 8,841,058	\$ 8,841,058	\$ 4,305,299	-	71.05%
June 30, 2022	June 30, 2021	0.06773%	\$ --	\$ 7,068,881	\$ 7,068,881	\$ 3,955,826	-	77.54%
June 30, 2021	June 30, 2020	0.07863%	\$ --	\$ 13,491,119	\$ 13,491,119	\$ 4,122,264	-	62.48%
June 30, 2020	June 30, 2019	0.08755%	\$ --	\$ 12,812,898	\$ 12,812,898	\$ 4,818,848	-	66.28%
June 30, 2019	June 30, 2018	0.09592%	\$ --	\$ 12,690,024	\$ 12,690,024	\$ 5,216,730	-	67.91%
June 30, 2018	June 30, 2017	0.10150%	\$ --	\$ 13,017,348	\$ 13,017,348	\$ 5,513,967	-	67.21%
June 30, 2017	June 30, 2016	0.10506%	\$ --	\$ 14,486,536	\$ 14,486,536	\$ 5,795,679	-	63.48%
June 30, 2016	June 30, 2015	0.10303%	\$ --	\$ 11,727,901	\$ 11,727,901	\$ 5,851,807	-	67.87%
Massachusetts Teachers' Retirement System								
Fiscal Year	Measurement Date	Proportion of the Net Pension Liability	Proportionate Share of the Net Pension Liability	Commonwealth of Massachusetts' Total Proportionate Share of the Net Pension Liability Associated with the Collaborative	Total Net Pension Liability Associated with the Collaborative	Covered Payroll	Proportionate Share of the Net Pension Liability as a Percentage of Covered Payroll	Plan Fiduciary Net Position Percentage of the Total Pension Liability
June 30, 2025	June 30, 2024	0.042323%	\$ --	\$ 10,731,586	\$ 10,731,586	\$ 4,045,357	-	61.45%
June 30, 2024	June 30, 2023	0.042229%	\$ --	\$ 11,102,023	\$ 11,102,023	\$ 3,918,740	-	58.48%
June 30, 2023	June 30, 2022	0.042065%	\$ --	\$ 10,889,971	\$ 10,889,971	\$ 3,668,647	-	57.75%
June 30, 2022	June 30, 2021	0.043619%	\$ --	\$ 9,904,412	\$ 9,904,412	\$ 3,468,854	-	62.03%
June 30, 2021	June 30, 2020	0.047346%	\$ --	\$ 13,514,959	\$ 13,514,959	\$ 3,397,762	-	50.67%
June 30, 2020	June 30, 2019	0.056981%	\$ --	\$ 14,367,222	\$ 14,367,222	\$ 3,587,327	-	53.95%
June 30, 2019	June 30, 2018	0.065278%	\$ --	\$ 15,478,182	\$ 15,478,182	\$ 4,146,598	-	54.84%
June 30, 2018	June 30, 2017	0.065285%	\$ --	\$ 14,940,804	\$ 14,940,804	\$ 4,584,365	-	54.25%
June 30, 2017	June 30, 2016	0.069674%	\$ --	\$ 15,577,621	\$ 15,577,621	\$ 4,433,479	-	52.73%
June 30, 2016	June 30, 2015	0.070960%	\$ --	\$ 14,539,513	\$ 14,539,513	\$ 4,582,903	-	55.38%

See independent auditors' report.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

**REQUIRED SUPPLEMENTARY INFORMATION
SCHEDULE OF PENSION CONTRIBUTIONS
(for the past ten years)**

Massachusetts State Employees' Retirement System

Fiscal Year	Actuarially Determined Contribution	Contributions in Relation to the		Covered Payroll	Contributions as a Percentage of Covered Payroll
		Actuarially Determined Contribution	Contribution Deficiency (Excess)		
June 30, 2025	\$ 245,811	\$ 245,811	\$ --	\$ 5,457,109	4.50%
June 30, 2024	\$ 256,806	\$ 256,806	\$ --	\$ 4,402,898	5.83%
June 30, 2023	\$ 262,623	\$ 262,623	\$ --	\$ 4,305,299	6.10%
June 30, 2022	\$ 241,562	\$ 241,562	\$ --	\$ 3,955,826	6.11%
June 30, 2021	\$ 251,458	\$ 251,458	\$ --	\$ 4,122,264	6.10%
June 30, 2020	\$ 293,950	\$ 293,950	\$ --	\$ 4,818,848	6.10%
June 30, 2019	\$ 318,221	\$ 318,221	\$ --	\$ 5,216,730	6.10%
June 30, 2018	\$ 336,352	\$ 336,352	\$ --	\$ 5,513,967	6.10%
June 30, 2017	\$ 324,558	\$ 324,558	\$ --	\$ 5,795,679	5.60%
June 30, 2016	\$ 326,736	\$ 326,736	\$ --	\$ 5,851,807	5.60%

Massachusetts Teachers' Retirement System

Fiscal Year	Actuarially Determined Contribution Provided by Commonwealth	Contributions in Relation to the		Covered Payroll	Contributions as a Percentage of Covered Payroll
		Actuarially Determined Contribution	Contribution Deficiency (Excess)		
June 30, 2025	\$ 1,023,170	\$ 1,023,170	\$ --	\$ 4,045,357	25.29%
June 30, 2024	\$ 907,357	\$ 907,357	\$ --	\$ 3,918,740	23.15%
June 30, 2023	\$ 885,312	\$ 885,312	\$ --	\$ 3,668,647	24.13%
June 30, 2022	\$ 762,663	\$ 762,663	\$ --	\$ 3,468,854	21.99%
June 30, 2021	\$ 735,495	\$ 735,495	\$ --	\$ 3,397,762	21.60%
June 30, 2020	\$ 822,642	\$ 822,642	\$ --	\$ 3,587,327	22.90%
June 30, 2019	\$ 858,260	\$ 858,260	\$ --	\$ 4,146,598	20.70%
June 30, 2018	\$ 806,610	\$ 806,610	\$ --	\$ 4,584,365	17.60%
June 30, 2017	\$ 783,540	\$ 783,540	\$ --	\$ 4,433,479	17.70%
June 30, 2016	\$ 725,165	\$ 725,165	\$ --	\$ 4,582,903	15.80%

See independent auditors' report.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

REQUIRED SUPPLEMENTARY INFORMATION SCHEDULE OF CHANGES IN THE NET OPEB LIABILITY *(for the past nine years)*

	2025	2024	2023	2022	2021	2020	2019	2018	2017
Total OPEB Liability									
Service cost	\$ 300,668	\$ 338,736	\$ 313,465	\$ 274,567	\$ 347,433	\$ 331,581	\$ 308,602	\$ 430,236	\$ 418,048
Interest	581,147	533,471	574,264	545,268	599,743	560,665	486,400	484,858	407,624
Differences between expected and actual experience	(398,423)	--	(1,477,125)	--	(2,236,911)	(7,367)	251,742	(533,893)	--
Changes of assumptions	306,036	(657,246)	413,956	417,900	1,218,704	--	(539,930)	--	--
Benefit payments, including refunds of member contributions	<u>(389,500)</u>	<u>(333,905)</u>	<u>(351,875)</u>	<u>(327,283)</u>	<u>(363,544)</u>	<u>(322,117)</u>	<u>(284,391)</u>	<u>(186,874)</u>	<u>(152,312)</u>
Net Change in Total OPEB Liability	399,928	(118,944)	(527,315)	910,452	(434,575)	562,762	222,423	194,327	673,360
Total OPEB Liability - Beginning	<u>8,228,638</u>	<u>8,347,582</u>	<u>8,874,897</u>	<u>7,964,445</u>	<u>8,399,020</u>	<u>7,836,258</u>	<u>7,613,835</u>	<u>7,419,508</u>	<u>6,746,148</u>
Total OPEB Liability - Ending (a)	<u>\$ 8,628,566</u>	<u>\$ 8,228,638</u>	<u>\$ 8,347,582</u>	<u>\$ 8,874,897</u>	<u>\$ 7,964,445</u>	<u>\$ 8,399,020</u>	<u>\$ 7,836,258</u>	<u>\$ 7,613,835</u>	<u>\$ 7,419,508</u>
Plan Fiduciary Net Position									
Contributions - employer	\$ 429,500	\$ 373,905	\$ 391,875	\$ 374,083	\$ 376,744	\$ 342,117	\$ 304,391	\$ 206,874	\$ 182,312
Net investment income (loss)	539,489	483,028	272,041	(187,066)	1,112,649	72,367	196,142	299,430	352,722
Benefit payments, including refunds of member contributions	<u>(389,500)</u>	<u>(333,905)</u>	<u>(351,875)</u>	<u>(327,283)</u>	<u>(363,544)</u>	<u>(322,117)</u>	<u>(284,391)</u>	<u>(186,874)</u>	<u>(152,312)</u>
Net Change in Plan Fiduciary Net Position	579,489	523,028	312,041	(140,266)	1,125,849	92,367	216,142	319,430	382,722
Plan Fiduciary Net Position - Beginning	<u>5,591,733</u>	<u>5,068,705</u>	<u>4,756,664</u>	<u>4,896,930</u>	<u>3,771,081</u>	<u>3,678,714</u>	<u>3,462,572</u>	<u>3,143,142</u>	<u>2,760,420</u>
Plan Fiduciary Net Position - Ending (b)	<u>6,171,222</u>	<u>5,591,733</u>	<u>5,068,705</u>	<u>4,756,664</u>	<u>4,896,930</u>	<u>3,771,081</u>	<u>3,678,714</u>	<u>3,462,572</u>	<u>3,143,142</u>
Net OPEB Liability - Ending (a-b)	<u>\$ 2,457,344</u>	<u>\$ 2,636,905</u>	<u>\$ 3,278,877</u>	<u>\$ 4,118,233</u>	<u>\$ 3,067,515</u>	<u>\$ 4,627,939</u>	<u>\$ 4,157,544</u>	<u>\$ 4,151,263</u>	<u>\$ 4,276,366</u>

Schedules are intended to show information for 10 years. Additional years will be displayed as they become available.

See independent auditors' report.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

REQUIRED SUPPLEMENTARY INFORMATION SCHEDULE OF NET OPEB LIABILITY, CONTRIBUTIONS, AND INVESTMENT RETURNS *(for the past nine years)*

	2025	2024	2023	2022	2021	2020	2019	2018	2017
Schedule of Net OPEB Liability									
Total OPEB liability	\$ 8,628,566	\$ 8,228,638	\$ 8,347,582	\$ 8,874,897	\$ 7,964,445	\$ 8,399,020	\$ 7,836,258	\$ 7,613,835	\$ 7,419,508
Plan fiduciary net position	6,171,222	5,591,733	5,068,705	4,756,664	4,896,930	3,771,081	3,678,714	3,462,572	3,143,142
Net OPEB Liability	<u>\$ 2,457,344</u>	<u>\$ 2,636,905</u>	<u>\$ 3,278,877</u>	<u>\$ 4,118,233</u>	<u>\$ 3,067,515</u>	<u>\$ 4,627,939</u>	<u>\$ 4,157,544</u>	<u>\$ 4,151,263</u>	<u>\$ 4,276,366</u>
Plan fiduciary net position as a percentage of the total OPEB liability	71.52%	67.95%	60.72%	53.60%	61.48%	44.90%	46.94%	45.48%	42.36%
Covered employee payroll	\$ 10,022,657	\$ 8,862,882	\$ 8,604,740	\$ 7,184,878	\$ 7,184,878	\$ 10,414,874	\$ 10,111,528	\$ 11,612,861	\$ 11,360,179
Net OPEB liability as a percentage of covered employee payroll	24.52%	29.75%	38.11%	57.32%	42.69%	44.44%	41.12%	35.75%	37.64%
Schedule of Contributions									
Actuarially determined contribution	\$ 427,665	\$ 482,984	\$ 479,097	\$ 485,233	\$ 511,210	\$ 680,131	\$ 621,725	\$ 730,499	\$ 684,578
Contributions in relation to the actuarially determined contribution	429,500	373,905	391,875	374,083	376,744	342,117	304,391	206,874	182,312
Contribution deficiency (excess)	<u>\$ (1,835)</u>	<u>\$ 109,079</u>	<u>\$ 87,222</u>	<u>\$ 111,150</u>	<u>\$ 134,466</u>	<u>\$ 338,014</u>	<u>\$ 317,334</u>	<u>\$ 523,625</u>	<u>\$ 502,266</u>
Covered employee payroll	\$ 10,022,657	\$ 8,862,882	\$ 8,604,740	\$ 7,184,878	\$ 7,184,878	\$ 10,414,874	\$ 10,111,528	\$ 11,612,861	\$ 11,360,179
Contributions as a percentage of covered employee payroll	4.29%	4.22%	4.55%	5.21%	5.24%	3.28%	3.01%	1.78%	1.60%
Schedule of Investment Returns									
Annual money weighted rate of return, net of investment expense	9.64%	9.53%	5.72%	-3.81%	29.41%	1.97%	5.64%	8.89%	12.78%

Schedule is intended to show information for 10 years. Additional years will be displayed as they become available.

See independent auditors' report.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

REQUIRED DISCLOSURES PER MASSACHUSETTS GENERAL LAWS CHAPTER 40, SECTION 4E

FOR THE YEAR ENDED JUNE 30, 2025

Chapter 40, Section 4E of the MGL requires an education collaborative to present certain disclosures as part of the audited financial statements, including: (1) the names, duties and total compensation of the five most highly compensated employees; (2) transactions between the educational collaborative and any related for-profit or non-profit organization; (3) the amounts expended on services for individuals with disabilities, age 22 and older; (4) the amounts expended on administration and overhead; (5) any accounts held by the collaborative that may be spent at the discretion of another person or entity; (6) transactions or contracts related to the purchase, sale, rental, or lease of real property; and (7) annual determination and disclosure of cumulative surplus.

Accordingly, the Collaborative discloses the following:

NAMES, DUTIES, AND TOTAL COMPENSATION OF THE FIVE MOST HIGHLY COMPENSATED EMPLOYEES

In fiscal year 2025, the names, duties, and total compensation of the Collaborative's five most highly compensated employees are as follows:

<u>Name</u>	<u>Duties</u>	<u>Total Compensation</u>
1) Sanchita Banerjee	Administration - Executive Director	\$ 192,500
2) Melissa Devine	Administration - Assistant Executive Director	\$ 144,500
3) Joseph Adams	Director of Finance and Operations	\$ 141,900
4) Carla Chioda	Special Education Administrator	\$ 128,702
5) Amanda Martinage	Principal	\$ 122,000

TRANSACTIONS BETWEEN THE COLLABORATIVE AND ANY RELATED FOR-PROFIT OR NON-PROFIT ORGANIZATION

In fiscal year 2025, there were no transactions between the Collaborative and any related for-profit or non-profit organizations.

AMOUNTS EXPENDED ON SERVICES FOR INDIVIDUALS AGED 22 YEARS AND OLDER

In fiscal year 2025, the Collaborative did not expend any monies on services for individuals aged 22 years and older.

CONCORD AREA SPECIAL EDUCATION COLLABORATIVE

**REQUIRED DISCLOSURES PER MASSACHUSETTS GENERAL
LAWS CHAPTER 40, SECTION 4E (CONTINUED)**

FOR THE YEAR ENDED JUNE 30, 2025

AMOUNTS EXPENDED ON ADMINISTRATION AND OVERHEAD

In fiscal year 2025, the Collaborative had the following administration and overhead expenditures:

	Administration	Overhead	Direct Costs	Total Governmental Funds
Expenditures				
Current:				
Program:				
Administration	\$ 943,783	\$ 15,000	\$ --	\$ 958,783
Supervision	--	--	1,076,701	1,076,701
Instruction	--	--	6,971,049	6,971,049
Instructional rent	--	395,580	1,819	397,399
Instructional insurance and benefits	--	--	1,585,108	1,585,108
Transportation operating	331,235	--	5,986,928	6,318,163
Transportation capital outlay	<u>--</u>	<u>--</u>	<u>652,432</u>	<u>652,432</u>
Total Expenditures	<u>\$ 1,275,018</u>	<u>\$ 410,580</u>	<u>\$ 16,274,037</u>	<u>\$ 17,959,635</u>

ACCOUNTS HELD BY THE COLLABORATIVE THAT MAY BE SPENT AT THE DISCRETION OF ANOTHER PERSON OR ENTITY

In fiscal year 2025, the Collaborative did not hold any accounts that may be spent at the discretion of another person or entity.

TRANSACTIONS OR CONTRACTS RELATED TO THE PURCHASE, SALE, RENTAL, OR LEASE OF REAL PROPERTY

In fiscal year 2025, there were no transactions or contracts related to the purchase or sale of real property. Transactions related to the rental or lease of real property are summarized in the paragraphs below.

The Collaborative rents administrative, classroom, and transportation facilities from its member communities. These expenditures are transacted as rent credits, which reduce the gross program tuitions and transportation assessments of the applicable member communities. In fiscal year 2025, the Collaborative recorded administrative, program supervision, and instructional rent credits of \$7,500 per room for a total of \$105,000

The Collaborative leases various spaces for additional administrative, classroom, and transportation facilities. In fiscal year 2025, the Collaborative paid a total of \$379,668 to Peter Central LLC for rental fees.

The Collaborative also leases transportation facilities from a private vendor. In fiscal year 2025, the Collaborative paid a total of \$90,065 to Wedgewood Realty Trust for rental fees and contracted maintenance charges for these transportation facilities.

Administration, program supervision, instruction and transportation tuition and assessment credits, as well as direct transportation facility rental expenditures are classified as overhead costs in the table of Administration and Overhead Expenditures on page 56.

ANNUAL DETERMINATION AND DISCLOSURE OF CUMULATIVE SURPLUS

In fiscal year 2025, the Collaborative cumulative surplus was calculated as follows:

Surplus Calculation Fiscal Year 2025	Enter values below	Page in FY25 Financial Statements
(A) PY Cumulative Surplus (FY25)	\$ 3,774,776	(A) PY
(B) Uses of Prior Year Surplus in Current Year		
B(1) used to support the FY25 budget	\$ -	
B(2) issued as credits to member districts	\$ -	
B(3) issued as a check(s) to member districts	\$ -	
B(4) deposited to capital account(s)	\$ -	
B(5) deposited to OPEB trust	\$ -	
Board voted uses of surplus funds during 2025	<i>(total from B1:B5)</i> \$ -	(B)
(C) Unexpended 2025 General Funds/Current Year Activity		page 15 - st. of revenues, expenditures, and changes in fund balance <u>governmental funds</u>
Change in fund balance from income statement	690,586	
Add back amounts in (B) included in FY25 income statement	\$ -	
Total	\$ 690,586	(C)
(D) Balance Sheet Reservations		
Plus:		
2024 funds encumbered for 2025	\$ 1,681,947	
2024 prepaid funds reserved in 2024 balance sheet	\$ -	
2024 funds committed for capital or OPEB	\$ -	
Less:		page 13 - balance sheet
2025 funds encumbered for 2026	\$ (1,122,734)	
2025 prepaid funds reserved in 2025 balance sheet	\$ -	
2025 funds committed for capital or OPEB	\$ -	
Total	\$ 559,213	(D)
(E) Cumulative Surplus as of June 30, 2025	A) - (B) + (C) + (D) = (E) \$ 5,024,575	(E) page 13 - balance sheet
(F) 2025 Total General Fund Expenditures *	16,221,771	(F)
(G) Cumulative Surplus Percentage	(E) ÷ (F) 30.97%	(G)
CUMULATIVE SURPLUS REDUCTION		
Allowable uses of surplus - in excess of the 25% limit		
(H) Cumulative surplus as of June 30, 2025	\$ 5,024,575	
25% limit (allowed)	\$ 4,055,443	
(I) Cumulative Surplus REDUCTIONS		
(I)1 Credited to member districts for tuition, services, etc.	\$ 969,132	
(I)2 Deposit to an established trust and/or reserve fund	\$ -	
(I)3 Returned (check) to school districts/towns	\$ -	
Total Reductions	\$ 969,132	
FY25 Cumulative Surplus Percentage after Reductions	25.00%	

* Net of intergovernmental on-behalf payments (MTRS an MSERS).
N/A - Not Applicable

**Independent Auditors’ Report on Internal Control Over Financial Reporting
and on Compliance and Other Matters Based on an Audit of Financial Statements
Performed in Accordance with *Government Auditing Standards***

To the Board of Directors
Concord Area Special Education Collaborative

We have audited, in accordance with the auditing standards generally accepted in the United States of America (“GAAS”) and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (“*Government Auditing Standards*”), the financial statements of the governmental activities, the major fund, and the aggregate remaining fund information of the Concord Area Special Education Collaborative (the “Collaborative”), as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise the Collaborative’s basic financial statements, and have issued our report thereon dated _____, 2025.

Report on Internal Control Over Financial Reporting

In planning and performing our audit of the financial statements, we considered the Collaborative’s internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Collaborative’s internal control. Accordingly, we do not express an opinion on the effectiveness of the Collaborative’s internal control.

A deficiency in internal control exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity’s financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that have not been identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Collaborative's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of This Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Collaborative's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Collaborative's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Boston, MA
Report Date



ANNUAL REPORT 2024-2025



Jacqueline LeSage, LMHC
Acting Executive Director
ACCEPT Collaborative

Dear ACCEPT Education Collaborative Community,

ACCEPT Education Collaborative takes pride in looking back on another year dedicated to our crucial mission of empowering children, uplifting families, and strengthening districts through education. Benjamin Franklin's timeless wisdom, "Tell me and I forget. Teach me and I remember. Involve me and I learn," deeply resonates with ACCEPT's core purpose. This profound truth of involving all students has consistently guided our efforts as we successfully harnessed the collective expertise and resources of our districts and staff, delivering exceptional, fiscally responsible programs and services that have truly fostered the potential within students, their families, dedicated educators, and the wider communities we serve.

I am pleased to share the remarkable progress we have made operationalizing our mission throughout the 2024-2025 school year, through the collective efforts across all ACCEPT departments, fostering excellence and innovation in educational practice for all. Guided by our Strategic Plan, we continued our goal of continuous improvement in areas such as Math and Literacy for All, with a steadfast focus on research-based curriculum and assessment, an expanded list of partnerships within our communities, and dedicated professional development for all Program staff. Our Home-Based Services Department significantly enhanced support for families, developing engaging community activities and workshops that were well-received. External Professional Development offerings remained dynamic, reflecting diverse and relevant topics for all educators and administrators, and saw increased participation in many relevant topics, particularly with special education focus. Furthermore, our Medicaid Department Leader diligently persisted in training and guiding district staff, contributing to maximized monetary reimbursements. Finally, ACCEPT's Transportation Department remained committed to effectively and safely shuttling our districts' students throughout the year.

This comprehensive report offers an in-depth look into the myriad ways ACCEPT Education Collaborative actively contributed to providing top-tier programs and services throughout the 2024-2025 school year. Our unwavering commitment has consistently centered on assisting districts in achieving optimal cost efficiency, delivering vital educational professional development, and ultimately enhancing our students' outcomes through a diverse array of impactful programs and services. We extend our deepest gratitude for your invaluable contributions to our work at ACCEPT Education Collaborative. We are genuinely excited to foster and build upon our robust partnership as we collectively champion our mission to address the evolving needs of students, families, educators, and communities for years to come.

A handwritten signature in black ink that reads "J. LeSage, LMHC".

Jacqueline LeSage, LMHC
Acting Executive Director



What are Collaboratives?

Massachusetts collaboratives are educational services agencies that bring school districts together to form partnerships that create regional educational resources. Collaboratives benefit districts, students, families, educators, and taxpayers by maximizing efficiency through shared costs and expertise; play a leadership role in developing a broad range of innovative programming to meet emerging needs; provide training; enable the sharing of exemplary educational practices; and serve and educate directly many of our most vulnerable students across the Commonwealth.

In 1974 Massachusetts legislation originally addressed demands for special education services. Since then, the 24 educational collaboratives statewide have grown to encompass a range of educational services and programs.

(Massachusetts Organization of Educational Collaboratives, 2016)

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MISSION AND VISION

Since 1974, ACCEPT has provided excellence and innovation in educational practice for school districts in Metrowest Boston.

Working collaboratively, ACCEPT offers opportunities for districts to stretch dollars and better meet the needs of students. This allows districts to maximize their investments in learning and growth. Flexible and adaptable, ACCEPT quickly responds to the individual needs of member districts with new programs and services. ACCEPT is supported primarily by fee-for-service activities, with an annual operating budget of almost \$18.6 million.

Over the years, ACCEPT has evolved and grown in educational programs and transportation services, as well as professional development, school consultation, program and student evaluations, home-based services, Medicaid reimbursement, and more.

OUR MISSION

The mission and purpose of ACCEPT is to leverage the collective power and resources of member school districts to provide excellent, cost-effective regional programs and services to unlock the potential of students, their families, educators and communities.

- We anticipate and respond to evolving educational needs with innovative, forward-thinking, high-quality, best-in-class programs and services.
- We complement and extend in-district options by leveraging our expertise, utilizing economies of scale, and building strength through collaboration.

ACCEPT GUIDING PRINCIPLES:

- **Respect for diversity and human differences**
- **Best practices**
- **Continuous improvement**
- **Open and honest communication & integrity**

The ACCEPT Advantage:

Students benefit from a professional staff, favorable student to teacher ratio, a wide variety of programs, and individualized learning.



BOARD OF DIRECTORS

The ACCEPT Education Collaborative is governed by a Board of Directors comprised of the 15 superintendents of the member school districts. Member district staff who serve on the Special Education, Curriculum, Technology, and Business Operations committees make recommendations to the Executive Director relative to program development and service delivery. ACCEPT is organized according to Massachusetts General Law Chapter 40, Section 4e.

BOARD LEADERSHIP:

Dr. Carol Cavanaugh, Superintendent

Chair of the ACCEPT Board of Directors, Holliston Public Schools
370 Hollis Street, Holliston, MA 01746

Dr. David Lussier, Superintendent

Vice Chair of the ACCEPT Board of Directors, Wellesley Public Schools
40 Kingsbury Street, Wellesley, MA 02481

ADDITIONAL MEMBERS:

- Mr. James Adams, Superintendent, Ashland Public Schools
- Ms. Elizabeth McCoy, Superintendent, Dover-Sherborn Regional Public Schools
- Dr. Robert Tremblay, Superintendent, Framingham Public Schools
- Mr. Lucas Giguere, Superintendent, Franklin Public Schools
- Dr. Susan Kustka, Superintendent, Holliston Public Schools
- Dr. Jeffrey Marsden, Superintendent, Medfield Public Schools
- Dr. Armand Pires, Superintendent, Medway Public Schools
- Mr. Robert Mullaney, Superintendent, Millis Public Schools
- Dr. Melissa Spash, Superintendent, Natick Public Schools
- Dr. Daniel E. Gutekanst, Ed.D., Superintendent, Needham Public Schools
- Mr. Jon Evans, Superintendent, South Middlesex Regional Vocational Technical School District
- Mr. Brad Crozier, Superintendent, Sudbury Public Schools
- Ms. Allison Borchers, Superintendent, Westborough Public Schools

Current Member Districts: Ashland Public Schools, Dover-Sherborn Regional Public Schools, Framingham Public Schools, Franklin Public Schools, Holliston Public Schools, Hopkinton Public Schools, Medfield Public Schools, Medway Public Schools, Millis Public Schools, Natick Public Schools, Needham Public Schools, South Middlesex Regional Vocational Technical School District, Sudbury Public Schools, Wellesley Public Schools, Westborough Public Schools

PLAN FOR SUCCESS

THEORY OF ACTION

If we leverage the collective power and resources of member school districts to provide excellent, cost-effective regional programs and services to unlock the potential of students, their families, educators and communities then we create an environment where all staff are fulfilled, valued, and appreciated; establish flexible, proactive recruiting and staffing structures across all departments that sustain growth based on stakeholders' needs; build and expand partnerships for all stakeholders; establish robust, innovative programs and services to meet the needs of students, families, and school districts; and develop and implement a collaborative and transparent process for budget development that identifies accurate revenue and expenses.

FOUR PILLARS OF SUCCESS			
Staffing and Culture	Partnerships and Communities	Programs and Services	Budget, Finance, and Operations
STRATEGIC OBJECTIVES			
1a. Create an environment where all staff are fulfilled, valued, and appreciated 1b. Establish flexible, proactive recruiting & staffing structures across all departments that sustain growth based on stakeholders' needs	2. Build and expand partnerships for all stakeholders	3. Establish robust, innovative programs and services to meet the needs of students, families, and school districts	4. Develop and implement a collaborative and transparent process for budget development that identifies accurate revenue and expenses

PILLAR 1: STAFFING AND PROFESSIONAL CULTURE:

Strategic Objective 1a: Create an environment where all staff are fulfilled, valued, and appreciated

Strategic Objective 1b. Establish flexible, proactive recruiting & staffing structures across all departments that sustain growth based on stakeholders' needs

Initiative 1.2: Increase internal and external professional development opportunities

Accomplishments in 2024-2025:

- Continued our partnership with Bridgewater State University to provide low to no cost options for staff to pursue teacher certification programs. We had three staff members who were awarded the BSU teacher licensure grant and engaged in their coursework and internships throughout the year.
- Increased the number of member and non-member district participants enrolled in online and virtual professional development workshops and courses.
- Graduated 16 professionals from the Education Leadership Institute (ELI) as principals and assistant principals.
- 49 new special education directors received PDPs for attending the 2-year long New Special Education Directors Leadership Institute.
- Continued to provide ACCEPT staff members access to ACCEPT's professional development workshops at no cost to the employee.
- Developed various professional development workshops for whole districts based on their requests and programmatic needs.
- Continued to develop and implement professional development opportunities for all districts that meet the specific needs of smaller professional groups such as speech and language pathologists, nurses, physical education & art teachers, occupational & physical therapists, BCBAs, etc.
- Developed both asynchronous and synchronous multi-part professional development for the DESE's new IEP.
- Continued a robust series of job-alike groups that were available to member and non-member districts, and provided free participation to ACCEPT staff members. These groups were offered to administrative assistants, assistant principals, assistant superintendents & curriculum directors, instructional coaches, OTs and PTs, SEL leaders, team chairs, and transition leaders.

Initiative 1.3: Establish connections with colleges and universities for recruitment and teacher training

Accomplishments in 2024-2025:

- ACCEPT partnered with Bridgewater State University to offer a significantly reduced cost teacher licensure program for our staff. We had 3 staff members who were awarded the BSU Teacher Licensure grant and engaged in the coursework throughout this year.
- Our relationship with MassBay Community College helped to provide dual enrollment to ACCEPT's high school and transition program students, as well as students from one member district, Medway High School. They participated in a Health Career Exploration Course. The course allowed students to earn credit and provided students the chance to see if a career in health care is right for them and to narrow down careers they would consider. The course introduced medical terminology, basic anatomy and physiology, career pathway exploration and critical soft skills. The course introduced global healthcare and cultural diversity in patient care. This partnership is set to continue next year as well.
- Through ACCEPT's work with the Education Leadership Institute (ELI), whose goal is to develop principals and assistant principals through an 18-month program, ACCEPT has maintained a collaborative relationship with Fitchburg State University.
- Developed and maintained relationships with local colleges and universities to increase the number of interns that work in our programs.

Initiative 1.4: Provide orientation, training, and mentoring to support staff in all areas

Accomplishments in 2024-2025:

- Developed professional development schedules that were specific to job title with internal and external presenters.
- Provided mentorship to three administrators who obtained initial Special Education Administrator license.
- Three current staff members were interested in pursuing Special Education Administrator licensure and were assigned a mentor to begin this summer and through the 2025-2026 school year.
- Expanded our orientation and initial training to guide staff successfully through their first weeks on the job.
- Evaluated and piloted high-quality math curriculums through an ACCEPT curriculum council and selected the enVision math curriculum to be implemented during the 25-26 school year.

Initiative 1.5: Offer competitive employee packages for salaries, benefits, and incentives (as feasible) for the hiring and retaining of staff

Accomplishments in 2024-2025:

- Revised salary scales across departments to promote equitable pay.
- Ongoing analysis of our insurance packages to optimize employee benefits and maintain affordable rates.
- Referral bonuses and longevity bonuses were highlighted and promoted throughout the year to promote retention.
- From the start of the year, ACCEPT has provided professional development and free offerings for wellness opportunities that staff can take part in during work hours.

Initiative 1.8: Develop personalized professional goals and support plans

Accomplishments in 2024-2025:

- Provided individualized plans for staff working towards initial and provisional licenses, with mentor and supervisor support.
- Developed and implemented workshops throughout the school year to assist staff in their student learning and professional practice goals.
- Three current staff members were interested in pursuing Special Education Administrator licensure and were assigned a mentor to begin this summer and through the 2025-2026 school year.

PILLAR 2: PARTNERSHIPS AND COMMUNITIES

Strategic Objective 2: Build and expand partnerships for all stakeholders

Initiative 2.1: Create a committee to plan, organize, and implement events and staff appreciation for ACCEPT

Accomplishments in 2024-2025:

- From the start of the year, ACCEPT has provided professional development and free offerings for wellness opportunities that staff can take part in during work hours.
- Continued to publish a monthly newsletter to recognize the excellent work and personal

accomplishments of staff.

- Arranged at least one staff outing each month.
- Monthly staff appreciation events and activities occurred throughout the year

Initiative 2.3: Provide social events and community-based supports across ACCEPT.

Accomplishments in 2024-2025:

- ACCEPT's Transition program partnered with a member district, Natick Public Schools Transition program, to create social and academic opportunities that included social events and activities within and outside of the school building.
- ACCEPT's Transition program also began outreach through mailed letters and emails to Transition programs across the United States to establish connections with students and other educators with like minded interests and day-to-day activities, expanding our social networks, vocational opportunities, and community-based support options.
- The high school program partnered with Medway Public Schools to continue to offer a Unified Basketball Team experience, and participation on the high school football, basketball, and baseball teams to interested ACCEPT students.
- The Home-Based Department continued to engage in evening activities to bring families together in an effort to improve student socialization and develop family support groups and training time. These classes focused on cooking together for students and engaged many of ACCEPT's occupational therapists in the classes this year.

Initiative 2.4: Develop a framework to establish, maintain, and sustain partnerships with businesses, families, higher education, community programs, and member districts

Accomplishments in 2024-2025:

- Continued to publish monthly parent newsletters featuring updates on Program events, student activities, family resources, important dates, and student highlights in each Program.
- Expanded external vocational placements for high school and transition aged, 18-22 year olds, to include nursing, teaching assistant, and administrative work, as new areas.
- The high school program partnered with Medway Public Schools to continue to offer a Unified Basketball Team experience, and participation on the high school football, basketball, and baseball teams to interested ACCEPT students.
- Continued to increase the number and type of monthly job-alike opportunities for professional educational groups to include administrative assistants, assistant principals, assistant superintendents & curriculum directors, instructional coaches, OTs and PTs, SEL leaders, team chairs, and transition leaders.
- ACCEPT continued to provide the year-long New Special Education Directors Leadership Institute for the 24th year.
- Continued to facilitate the Education Leadership Institute (ELI) for the development of new principals and assistant principals
- Continued our partnership with Bridgewater State University to provide low to no cost options for staff to pursue teacher certification programs. We had three staff members that were awarded the BSU teacher licensure grant and engaged in their coursework and internships throughout the year.
- Our relationship with MassBay Community College helped to provide dual enrollment to ACCEPT's high school and Transition programs students, as well as students from one member district, Medway High School.

- Our Transition program partnered with a member district, Natick Public Schools Transition program, to create social and academic opportunities that included social events and activities within and outside of the school building.

Initiative 2.5: Establish and maintain partnerships with higher education institutions to support students, staff members, and programs

Accomplishments in 2024-2025:

- Continued ACCEPT's partnership with Bridgewater State University to provide low to no cost options for staff to pursue teacher certification programs. We had three staff members that were awarded the BSU teacher licensure grant and engaged in their coursework and internships throughout the year.
- A partnership with MassBay Community College to provide high school and transition students dual enrollment for classes in the area of Health Care.
- Through the ELI Program, ACCEPT continued their partnership with Fitchburg State University.
- Developed and maintained relationships with local colleges and universities to increase the number of interns that work in our Programs.

PILLAR 3: PROGRAMS AND SERVICES

Strategic Objective 3: Establish robust, innovative programs and services to meet the needs of students, families, and school districts

Initiative 3.1: Offer a standard scope and sequence academic curriculum with measurable benchmarks & clear vertical alignment to prevent gaps

Accomplishments in 2024-2025:

- A team of staff reviewed and piloted various math curriculums and were able to choose enVision Mathematics, which will be implemented in the 2025-2026 school year.
- Continue to utilize iReady and DIBELS 8 to provide targeted data in Reading and Mathematics to guide student growth and classroom instruction.
- Implemented curriculum meetings with data focus to reflect and develop action plans to meet the needs of the whole class, small group, and individual students.
- Continued to develop a 5-year Curriculum Review Cycle for the purposes of maintaining relevant, engaging, and rigorous curriculum and resources.
- All program staff received professional development in the new IEP development, lesson planning, SIPPS, MyView, Amplify Reading, evaluation and report writing, integrated monitoring review, and more.
- Program staff received training in standard assessments to establish baseline data points and to systematically track student learning progress during the school year to include academic, behavioral, and social emotional data points.

Initiative 3.2. Increase therapeutic staffing & supports to provide a more intensive service than public school districts

Accomplishments in 2024-2025:

- ACCEPT added an additional full-time licensed clinical social worker and school adjustment counselor

to the middle school program.

- The clinical team expanded their practice by pushing into classes to deliver the social-emotional curriculum initiatives and Restorative Practices throughout the week.
- Increased collaboration/consultation meetings with all professional staff to review and analyze data, develop or modify students' success plans, and share strengths of program and services.
- Continue to implement the new social-emotional curriculum and collect and analyze data to improve student outcomes.
- Ongoing implementation of triannual schoolwide mental health screening, utilizing the Behavior Intervention Monitoring Assessment System (BIMAS-2), with parent, teacher, and self-report measures.

Initiative 3.4: Develop a diversity, equity, and inclusion plan that impacts programs, services, partnerships, staffing, and professional culture

Accomplishments in 2024-2025:

- Continued to use Restorative Circles as Tier 1 practice for building community within classrooms, staff meetings, and other administrative meetings.
- Began the training and use of Tier 2 and Tier 3 development of supports for SEL beginning with Restorative Justice Harm circles and use of conferencing.
- Program staff were provided curriculum information and professional development that is focused on diversity, equity, and inclusion.

Initiative 3.5 Ensure effective transitional programs, services, & partnerships.

Accomplishments in 2024-2025:

- ACCEPT's Transition program partnered with a member district, Natick Public Schools Transition program, to create social and academic opportunities that included social events and activities within and outside of the school building.
- ACCEPT's Transition program also began outreach through mailed letters and emails to Transition programs across the United States to establish connections with students and other educators with like minded interests and day-to-day activities, expanding our social networks, vocational opportunities, and community-based support options.
- Expanded external vocational placements to include nursing, business management, and administrative work, as new areas.
- Our Transitions program partnered with MassBay Community College helped to provide dual enrollment by participating in a Health Career Exploration Course. The course allowed students to earn credit and provided students the chance to see if a career in health care is right for them and to narrow down careers they would consider. The course introduced medical terminology, basic anatomy and physiology, career pathway exploration and critical soft skills. The course introduced global healthcare and cultural diversity in patient care. This partnership is set to continue next year as well.

PILLAR 4: BUDGET, FINANCE, AND OPERATIONS

Strategic Objective 4: Develop and implement a collaborative and transparent process for budget development that identifies accurate revenue and expenses

Initiative 4.1: Establish a budget process that represents all departments and stakeholders

Accomplishments in 2024-2025:

- Established a timeline for the internal budget analysis process and continued meeting with select ACCEPT departments to improve knowledge, access, and proper allocation of funds.
- A continuation of Professional Development in budget management was provided to the Leadership Team as they had established their professional development goals around the overall budget process.
- The Leadership Team worked together in developing the FY26 budget and met regularly to enhance the understanding of the budgeting process
- Developed a budget that supports the Collaborative's vision, mission, and goals; allocates and manages expenditures consistent with Collaborative goals and available resources.
- In collaboration with stakeholders and all departments, ACCEPT has accomplished more streamlined and accurate revenue and expense management through standardization of procedures and maintaining open communication.

Initiative 4.2: Increase accountability and understanding of the budget**Accomplishments in 2024-2025:**

- Continued use of a task list to ensure the Finance department is meeting weekly, quarterly, and yearly objectives throughout the year.
- Continued weekly finance and operations staff meetings to improve communication between the leadership team and finance and operations staff.
- The Director of Finance met with members of the Leadership Team one-on-one to address specific questions about their budgets.

Initiative 4.4: Conduct an internal budget analysis that includes all ACCEPT departments.**Accomplishments in 2024-2025:**

- Along with our scheduled program audits, ACCEPT's Director of Finance and Operations worked with the finance and operations team to conduct monthly budget analyses to support effective budget timelines and budget planning needs.



PROGRESS IN ACHIEVING PURPOSE

Since its formation in 1974, ACCEPT has established trusted partnerships with districts to achieve the objectives and purposes set forth in its Collaborative Agreement. The following table highlights progress in 2024-2025.

OBJECTIVES OUTLINED IN COLLABORATIVE AGREEMENT	PROGRESS TOWARDS THOSE OBJECTIVES IN 2024-2025
<p>ELEVATE STUDENT OUTCOMES</p> <p>Deliver efficient, cost-effective, and high-quality programs and services that minimize the impact of student disabilities and maximize student outcomes including achievement, independence, and participation in the community.</p>	<ul style="list-style-type: none"> • From the first days of the school year, the program staff have continued to receive extensive Professional Development to include: New IEP training, ACT Safety training, Restorative Justice Practices, SEL in the classroom, SIPPS reading program, Math pilot trainings, AAC training, best practices in lesson planning & collaborative lesson planning, Safety Care training and teacher evaluation calibration as we continue our journey of continuous improvement. • A Team Chair was welcomed to ensure IEP writing, implementation, and evaluations are collaborative and connected with district goals. • Favorable staff-to-student ratios are at the heart of the ACCEPT model. • Collaboration with the Medway Police Department and the Natick Police Department has been continued. • Life Skills Program continues to develop full scaled, vertically aligned curriculum guides. • The Transition Program increased the number of businesses that welcome students for volunteering and developing job skills. • ACCEPT’s Transition program also began outreach through mailed letters and emails to Transition programs across the United States to establish connections with students and other educators with like minded interests and day-to-day activities, expanding our social networks, vocational opportunities, and community-based support options. • Professional Development in Literacy informed by the Massachusetts Dyslexia Guidelines continues • Data teams continue to analyze and respond to academic, social/emotional, and behavioral student data. • Data Teams were formed to analyze and respond to academic, social/emotional, and behavioral student data.

OBJECTIVES OUTLINED IN COLLABORATIVE AGREEMENT	PROGRESS TOWARDS THOSE OBJECTIVES IN 2024-2025
<p>RESPOND TO DISTRICT NEEDS WHERE COLLABORATION IS A SENSIBLE APPROACH</p> <p>Develop and implement programs and an array of services that increase educational opportunities for students, families, educators, and districts when it is determined that such programs and services can most effectively, efficiently, and economically be provided on a collaborative basis and complement, strengthen, and meet the evolving needs of member districts.</p>	<ul style="list-style-type: none"> • ACCEPT increased the number of general education teacher and administrator professional development offerings. • In collaboration with Bridgewater State University, ACCEPT staff participated in a program to assist our staff in achieving an initial license in teaching. • Updated the strategic plan to produce professional development activities, workshops, and packages that reflect the needs of our families, general educators, school districts, and community. • Completed and provided consultations and evaluations to build capacity to keep students in-district for member and non-member districts. • Expanded expertise in the area of literacy, trauma-informed services, restorative justice, and parent training. • Our Transitions program partnered with MassBay Community College helped to provide dual enrollment by participating in a Health Career Exploration Course. The course allowed students to earn credit.
<p>EXPAND PROGRAMS TO MEET NEW NEEDS</p> <p>Expand program options in alignment with the mission and purpose of the Collaborative to help districts maximize cost-efficiency and program effectiveness through a collaborative effort.</p>	<ul style="list-style-type: none"> • ACCEPT continues to expand its work on literacy for all, utilizing the MA Dyslexia Guidelines, and has selected a new mathematics curriculum for implementation in the coming school year. • ACCEPT continues to expand and deepen trainings in Restorative Justice for ACCEPT staff and external districts. • ACCEPT has provided an increased number of daytime and evening social events for our School Programs, Home-Based, and Life Skills students. • Facilitated hybrid monthly job-alike groups to support our professional learning communities: Administrative Assistants, Assistant Principals, Assistant Superintendents & Curriculum Directors, Instructional Coaches, OTs and PTs, SEL Leaders, Team Chairs, and Transition Leaders. • Academic therapeutic and Academic life skills programs for students Pre-K to age 22. • Has provided a number of evaluations and consultations to member and non-member district to meet their needs with Safety Care training, school refusal evaluation, transition assessments, academic achievement, specialists assessments, and more.

OBJECTIVES OUTLINED IN COLLABORATIVE AGREEMENT	PROGRESS TOWARDS THOSE OBJECTIVES IN 2024-2025
<p>TRANSPORT STUDENTS WITH DISABILITIES</p> <p>Provide safe, reliable, and efficient transportation services for students with disabilities.</p>	<ul style="list-style-type: none"> • 135+ students were transported to various programs and specialized schools. • ACCEPT maintains a fleet of 60 vans providing flexibility and efficiency in dispatching drivers. • ACCEPT continues to supplement capacity by contracting with local transportation companies. • ACCEPT continued to increase the amount and frequency of driver professional development that included outside trainers for safety training information, and understanding of social, emotional, and behavioral needs of the students being serviced.
<p>OFFER PROFESSIONAL DEVELOPMENT FOR CONTENT, SKILLS, AND SHARING OF PRACTICE</p> <p>Offer quality professional development opportunities to general and special education teachers, administrators, and related service providers, focused on closing achievement gaps, preventing unnecessary referrals to special education, and personalizing learning for students.</p>	<ul style="list-style-type: none"> • Coordinated with Bridgewater State University for support of 3 ACCEPT staff members with classes toward special education teacher licensure. • Conducted the 23rd new Special Education Directors Leadership Institute. • Welcomed multiple cohorts to the Education Leadership Institute (ELI) to develop future principals and assistant principals. • ACCEPT hosted job-alike groups for Administrative Assistants, Assistant Principals, Assistant Superintendents & Curriculum Directors, Instructional Coaches, OTs and PTs, SEL Leaders, Team Chairs, and Transition Leaders. • Developed personalized professional development offerings specific to individual district needs. • Continued relationships with Bridgewater State, Fitchburg State, and Mass Bay Community College. • Provided targeted professional development to ACCEPT staff and ACCEPT leadership that was specific to job title and requests for further learning. • Program staff received training in standard assessments to establish baseline data points and to systematically track student learning progress during the school year to include academic, behavioral, and social emotional data points.

OBJECTIVES OUTLINED IN COLLABORATIVE AGREEMENT
PROGRESS TOWARDS THOSE OBJECTIVES IN 2024-2025
OFFER PROFESSIONAL DEVELOPMENT FOR CONTENT, SKILLS, AND SHARING OF PRACTICE

Offer quality professional development opportunities to general and special education teachers, administrators, and related service providers, focused on closing achievement gaps, preventing unnecessary referrals to special education, and personalizing learning for students.

- Coordinated an ongoing series of SEI endorsement courses for teachers and administrators.
- ACCEPT has increased the number of Transition evaluations completed for districts.
- ACCEPT has provided many Program Evaluations for member and non-member districts to improve the services provided to students.
- Conducted the 23rd new Special Education Directors Leadership Institute.
- Welcomed multiple cohorts to the Education Leadership Institute to develop Principals and Assistant Principals.
- ACCEPT hosted job-alike groups for Special Education Directors, Business Managers, Curriculum Directors, BCBA professionals, pre-school coordinators, and elementary and high school special education coordinators.
- Developed personalized professional development offerings specific to individual district needs.
- Established relationships with Bridgewater State University, Fitchburg State University and began discussions with Mass Bay Community College.
- An increase of diversity and equity topics and practices were incorporated into daily classroom curriculum.
- Provided targeted professional development to the ACCEPT Leadership Team and the overall ACCEPT staff in DEI following the guidelines of MASS REDI standards.

PARTNERSHIPS FOR LEARNING

Thank you to the many generous organizations, businesses, and individuals in the MetroWest area whose partnerships ACCEPT students and staff have enjoyed and benefited from in 2024-2025.

Natick Public Schools Food Service provides our students at the Center for Learning and Growth breakfast and a hot lunch daily. Natick Food Service delivers the meals, and students in our Transition programs learn food service vocational skills including customer service, maintaining high standards for food handling, and tracking of lunch payments and meals delivered.

The Transition Program will work with the **Natick Conservation Commission** as stewards of the Pine Hill Trail to walk the trail bi-monthly, clear branches and trash, report conditions of the trail to the Commission and help with the upkeep of the other Natick hiking trails if possible.

Medway Public Schools has warmly welcomed ACCEPT's staff and students at Medway's Middle and High Schools again this year. A big thank you to Medway for their collaboration and helping to make ACCEPT's public day programs outstanding.

ACCEPT outstanding parents, colleagues, and friends honored staff by generously contributing funds for enrichment activities for students. Our staff appreciates the contributions as an alternative to teacher gifts and enjoys sharing new resources with their classrooms.

Casual for a Cause is a tradition at ACCEPT, raising funds and awareness for many causes and organizations that align with our mission. During the school year several days are dedicated to "Casual for a Cause," where donations are requested and the staff enjoy a casual dress down day. This year ACCEPT has again supported Muscular Dystrophy Association's Deno's Dash 5K, Boston Children's Hospital's Miles for Miracles Team for Jillian, and the Boston Marathon Jimmy Fund Walk. The Staff generously contributed to the ACCEPT Helping ACCEPT Fund to help our students and families and they also collected personal supplies for the Shadows Shelter for Women during the holiday season.





Special Education (Pre-K - Transition)

- Academic and Therapeutic
- Academic and Life Skills
- Academic and Language-Based Transition
- Extended School Year

Educator Development

- Professional Development for Educators
- Customized Training for Districts
- Online Learning
- Special Education Directors Leadership Institute
- Educator Leadership Institute

Collaborative Offerings

Our Expert Staff Includes:

Master's level educators | Reading specialists | Board Certified Behavior Analysts |
 School and clinical psychologists | Licensed Mental Health Counselors |
 Licensed Social Workers | Speech Pathologists
 Occupational Therapists | Physical Therapists | Registered Behavior Technicians (RBT)
 (Massachusetts Organization of Educational Collaboratives, 2016)

SPECIAL EDUCATION PROGRAMS

At ACCEPT, we work with parents and districts to design individualized, evidence-based programs for each student addressing academics, behavioral and therapeutic needs, life skills, and specialized services based on the IEP. The goal is to build strengths and self-confidence, and to maximize potential for students in elementary, middle, and high school grades.

Our programs address autism spectrum disorders, emotional/behavioral needs, global impairments and medically involved disabilities, cognitive/intellectual disabilities, language disorders, ADHD/ADD, and nonverbal learning disability. ACCEPT programs are supported by a highly trained, specialized team of teachers and specialists, who are hired for their hearts and for their minds.

PROGRAM	TYPE OF DISABILITY
Academic and Therapeutic	Emotional, Autism, Neurological
Academic and Life Skills	Autism, Communication, Developmental Delay, Intellectual, Neurological, Health, Multiple Disabilities, Physical
Academic and Language-Based	Autism, Communication, Neurological, Specific Learning, Emotional, Health, Intellectual
Transition	Full range of disabilities

ACADEMIC AND THERAPEUTIC

The programs in the Therapeutic strand bring together clinical, therapeutic, and behavioral services with rigorous academics, and support to strengthen skills. We use an integrated team model that seamlessly blends individualized clinical services within the practices and routines of the school day to help students learn the skills they need in the places they will use them, with more practice opportunities. Each student participates in all classroom activities, and teachers and therapists can focus on skills that are immediately useful leading to better generalization of the skills. The academic curriculum is challenging and engaging, aligned with Massachusetts Curriculum frameworks.

- Individualized clinical services include:
- A therapeutic milieu providing consistent routines and clinical supports.
- Embedded group social skills instruction and counseling, individual counseling and clinical check-ins, and coping strategy practice.

ACADEMIC AND LIFE SKILLS

The programs in the Life Skills strand blend academics, daily living, personal/social and occupational skill development with behavioral and social supports in a highly individualized program, tailored to the student's unique profile, based on the IEP. This makes every day an opportunity for students to develop self-confidence, self-control, and the life skills to pursue their passions. The program is a great fit for students who have complex language and learning difficulties, have issues with behavior or coping, and

need moderate to significant modification to the Massachusetts Curriculum Frameworks in order to make effective progress.

Features include:

- Academics and life skills curriculum tailored to the needs of each student.
- Consistent and predictable routines and structures, shared with families and home providers for adaptation to the home.
- Expected classroom and community behaviors that are communicated, practiced, and reinforced throughout the day.
- Individual and small group explicit instruction, which may include Social Thinking techniques, video modeling and feedback, self-rating scales, and more.

ACADEMIC AND LANGUAGE-BASED

The programs in the Language-Based strand prepare students for a successful elementary school experience by addressing moderate language and learning difficulties. Comprehensive academic, behavioral, and clinical service supports center on developing oral, social, and written language skills to enhance communication and comprehension of academic content. Each student's program is individualized and based on the IEP, with curriculum aligned with Massachusetts Curriculum Frameworks. Individual and small group instruction with low student-to-teacher ratios targets communication and social skills, academics, executive functioning skills and compensatory strategies to increase student independence.

TRANSITION PROGRAMS – AGES 18-22

Transition programs prepare students for a successful passage to adult living. We view each student as the unique individual they are and, using their IEP and results from transition and vocational assessments, develop a personalized transition plan to maximize independence, vocational potential, participation in the community, and help students meet their postsecondary vision. At the heart of our transition programs is an integrated team model that seamlessly blends functional academics, community experiences, social skills development, specialized services, vocational training, and independent living skills.

Value and Cost Comparisons – School Year						
LOCATION	Type of program	Member Tuition	Non-Member Tuition	Member Savings	Average Private School Tuition	Average Savings Over Private School
ACCEPT CENTER FOR LEARNING AND GROWTH OR MEDWAY PUBLIC SCHOOLS	Academic and Therapeutic	\$57,420	\$68,900	\$11,480	\$109,244	\$51,824
	Academic and Life Skills	\$57,420	\$68,900	\$11,480	\$162,494	\$98,954
	Academic and Language-Based	\$57,420	\$68,900	\$11,480	\$109,244	\$51,824
	Transition	\$63,540	\$76,250	\$12,710	\$124,577	\$61,037

**Cost comparisons were made using tuition information available on the OSD In-state FY25 tuition rate sheet by averaging the tuition of private institutions providing similar services.*

EXTENDED SCHOOL YEAR (SUMMER)

The Extended School Year programs are designed to prevent substantial regression of skills and provide a bridge between academic years. Structured individual, small group, and classroom instruction is provided consistent with the students' Individualized Education Programs.

Value and Cost Comparisons - Extended School Year						
LOCATION	Type of program	Member Tuition	Non-Member Tuition	Member Savings	Average Private School Tuition	Average Savings Over Private School
ACCEPT CENTER FOR LEARNING AND GROWTH OR MEDWAY PUBLIC SCHOOLS	Academic and Therapeutic	\$7,975	\$9,570	\$1,595	\$10,031	\$2,056
	Academic and Life Skills	\$7,975	\$9,570	\$1,595	\$10,031	\$2,056
	Academic and Language-Based	\$7,975	\$9,570	\$1,595	\$10,031	\$2,056
	Transition	\$8,825	\$10,590	\$1,765	\$14,005	\$5,180

**Cost comparisons were made using tuition information available on the OSD In-state FY25 tuition rate sheet by averaging the tuition of private institutions providing similar services.*



EDUCATOR DEVELOPMENT

PROFESSIONAL DEVELOPMENT WORKSHOPS, COURSES, AND ONLINE OFFERINGS

ACCEPT believes that what matters most in student achievement is high-quality teaching and support that takes into account the whole student. Professional development programs are designed to meet the instructional, management and leadership challenges that educators face. Our innovative workshops and courses are offered in a variety of formats including online, hybrid, and in-person options. Our website is updated regularly to reflect our full listing of current offerings.

Asynchronous Training:

- Mentoring
- Navigating the Teacher Evaluation System
- Implementing the MA IEP
- Paraprofessional Training

PROFESSIONAL DEVELOPMENT WORKSHOPS

ACCEPT focuses on professional development to improve critical areas of practice. Our sessions utilize experts in the field and contain high levels of collaboration, critical thinking, and activities that are applicable to practice.

Workshops offered in 2024-25 focused on topics that were most meaningful to the everyday practice of a wide variety of educational professionals. Over 800+ educators participated in ACCEPT workshops on a variety of topics including:

- ADOS 2 Training
- Co-teaching
- Data-based Decision Making
- IEP Training
- Orton-Gillingham Training
- School Refusal
- SEI Endorsement
- Title IX
- Transition Planning
- Science of Reading
- Reading Interventions
- 15-hour training for recertification in Special Education and English Language Learning
- Specialized courses for art teachers, librarians, guidance counselors, music teachers, occupational & physical therapists, PE teachers, school psychologists and SLPs

MONTHLY JOB-ALIKE GROUPS

- Administrative Professionals
- Assistant Principals
- Assistant Superintendents & Curriculum Directors
- Instructional Coaches
- Occupational Therapists and Physical Therapists
- SEL Leaders
- Special Education Directors
- Team Chairs
- Transition Leaders

CUSTOMIZED TRAININGS FOR DISTRICTS

ACCEPT has developed programs that offer total flexibility, allowing districts to receive comprehensive instruction utilizing multi-modal teaching techniques including reading materials. Customized professional development workshops are tailored to each district's specific needs. Our presenters and facilitators, who are highly skilled practitioners, have expertise in a wide range of topics. For example, ACCEPT has provided customized district training for educators and administrators that focuses on mentoring, Safety Care and transition planning.

VALUE AND COST COMPARISONS

ACCEPT's Educator Development offerings are high value, both in quality and cost. Post-workshop evaluations, as well as the number of educators who register for ACCEPT workshops and courses year after year, are indicators of the quality and practicality of offerings in helping educators address their current challenges. ACCEPT offerings are at or below the cost of other workshops offered in the MetroWest area. Through the collaborative, many districts were able to access Orton-Gillingham and ADOS2 training for their educators that may have been otherwise cost-prohibitive.

SPECIAL EDUCATION LEADERSHIP INSTITUTE

The New Special Education Directors Leadership Two-Year-Long Institute is a great opportunity for Directors of Special Education and/or Student Services who are new to their roles!

This recently expanded program will provide two years of support that exposes participants to new research and approaches in special education and student services leadership. Participants will develop and strengthen proactive management and leadership skills to implement a responsive and legally compliant special education service delivery system in their districts. Each director will be provided an experienced director to serve as a mentor-coach to help guide them through their learning opportunities. Additionally, they will meet fellow new Directors and create lasting bonds and friendships.

The syllabus for the two year-long program includes content on social emotional learning, cultural proficiency, addressing equity issues in education, state & federal mandates, data analysis, interpretation and application to strategic planning. This leadership program provides many opportunities for discussion and collaborative problem-solving. Because navigating the role and substantial responsibilities of a Director of Special Education/Student Services is a highly complex and political undertaking, requiring the leader to develop and strengthen both leadership and management skills, while also staying up-to-date on best practices and compliance, our syllabus weaves four strands throughout this two year-long experience.

- **Leadership** – Leadership as a Special Education/ Student Services Director means frequent collaboration with other district-wide and building-based leaders; this program will include topics to help strengthen these critical relationships so that students with learning challenges have truly meaningful educational experience opportunities.
- **Technical Knowledge and Skill Development** – Efficient operational and compliance oversight helps to improve outcomes of students with IEPs and protect the rights of students and their families.
- **Equity/Inclusive Practices** – Identifying, understanding and improving the equity gap in education through systemic analysis of data and educational practices. While many of us have recently been involved in DEI training, this institute will provide different perspectives and information regarding this critical work; Directors are often the ‘voice at the table’ to ensure equity for the vulnerable students, families, and staff is part of every decision. We are all part of the solution.

Capstone/Mentoring and Small Group Problems of Practice – Put theory into action! Using a Results Driven Accountability (RDA) approach, and the DESE Planning for Success Model, directors will identify a ‘problem of practice’, a targeted area for improvement, chosen by each director based on an ‘equity gap’ unique to district, and one that is evident through analysis of district-specific data.

As success in a leadership role is impacted by one’s networking ability, we have planned these seminar dates to be in-person. Participants will have the opportunity to connect with other special education/student services directors, as well as mentor-coaches during our seminar dates.

EDUCATOR LEADERSHIP INSTITUTE

ACCEPT's Educator Leadership Institute (ELI) is a licensure program preparing teachers and administrators for Principal/Assistant Principal PreK-8 or 5-12. Upon completion of the coursework, ELI endorses the cohort of candidates to the Massachusetts Department of Elementary and Secondary Education for licensure. Candidates may also choose to receive a master's degree in partnership with Fitchburg State University. Each new cohort begins in January.

ELI graduates apply for and are often chosen for top administrative leadership positions in both suburban and urban settings. ELI has been successful in placing over 200 graduates in leadership positions in the greater metro Boston area. Since its founding in 2003, ELI graduates have assumed educational leadership positions in a diversity of school districts.

ELI prepares teachers and administrators with leadership potential for Principal/Assistant Principal PreK-8 and 5-12 positions. Upon completion of the coursework, ELI endorses the cohort of candidates to the Massachusetts Department of Elementary and Secondary Education for licensure.

The program consists of graduate course work and a supervised practicum. The next 18-month program, starting in January 2026 and ending in June 2027, can be completed while maintaining a full-time teaching or administrative position.

Sample Courses:

Topics: Leadership for Effective Change (3 credits)

Courses Description: This course speaks to the 'how' of educational administrative leadership, and more specifically how to facilitate effective educational change. Candidates inductively learn their lessons by reflecting on experiences within the school where they work. School-based problems and opportunities, classroom simulations and case studies seek to replicate what administrators actually do. Candidates develop their leadership skills by observing and practicing a variety of leadership tasks. This course has a heavy emphasis on theory and best practice underpinnings but has an even weightier experiential base. The fundamental principles and concepts of education change lay the groundwork for the execution of PAL task 2 which will be completed during the practicum portion of the program.

Topics: Using Data to Address the Opportunity/Achievement Gap Through Effective School Improvement Planning (3 credits)

Course Description: The identification and effective use of all types of data are the foundation of this course. Candidates are required to analyze school-based data from a variety of sources to formulate school improvement plans. Candidates are taught to delve deeply into data from EDWIN to understand gaps in student performance and identify cohorts of underperforming students. Candidates examine various support systems that are available to assist students and learn strategies that engage teachers in developing plans for continuous improvement and narrowing achievement gaps. There is a heavy emphasis on data analysis skills, accompanied by authentic activities that allow students to practice working with a group of teachers to analyze data and create a plan for improvement. These courses help candidates prepare for and begin the completion of PAL task 1.



HOME-BASED
THERAPEUTIC
PROGRAM

CONSULTATION
AND EVALUATION
SERVICES FOR
DISTRICTS

VHS ONLINE
(VIRTUAL HIGH
SCHOOL)

TRANSPORTATION
SERVICES

MEDICAID
REIMBURSEMENT
SERVICES

Collaborative Services

As an extension of the districts we have intimate knowledge of their challenges and readily customize services to meet the specific needs. Our demonstrated ability to respond to the evolving environment and regulatory changes are true differentiators of ACCEPT's services.

HOME-BASED SERVICES

ACCEPT Home-Based Services are provided in the home and/or in the student's community, and are tailored to address each student's individual needs. The focus is on training the family/parents to better support their child as well as to improve the students' independent living skills across the home and community. Parents and families are an active part of every session. The ultimate goal of services is for the parent/family to carry out programs so that the student is successful in their natural environment and to supplement and facilitate the child's educational progress. These services provide an opportunity to integrate the effective strategies being used at school into the student's home and community.

To determine the most appropriate service delivery model and identify meaningful skills to work on at home and in the community, initial assessments typically include either a Home Functional Behavior Assessment (FBA) or an Adaptive Living Skills Assessment. Service delivery models include direct services to the student and parent training.

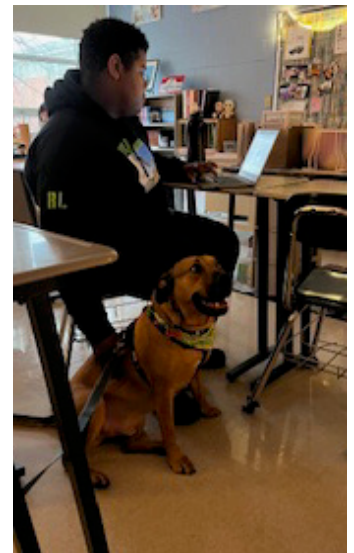
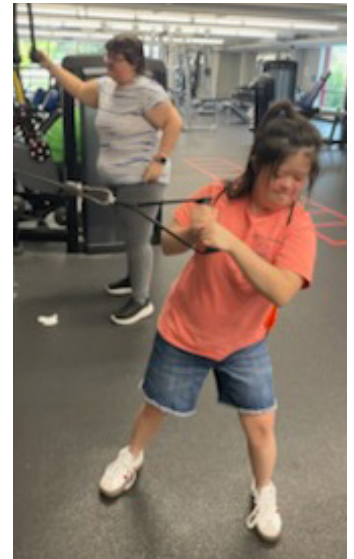
During the 2024-2025 school year, we provided services for 17 families in 7 member districts and 3 non-member districts. We also completed 13 home assessments.

For the second year in a row, the Home-Based Department received a grant from an organization called Cooking Autism. With this grant money we provided four after-school cooking classes for our families. Two occupational therapists from ACCEPT facilitated the class of approximately 8 students. The students were involved in preparing and cooking the food while learning to become more independent in the kitchen. Additionally, students had the opportunity to meet new peers and socialize with their peers while they enjoyed their culinary creations! While students were cooking in the kitchen, the families attended parent education classes. Some of the topics this year were improving sleep hygiene and sibling interactions.

Home-based staff also had an opportunity to engage in professional development opportunities, such as how to involve siblings during home sessions. Our supervisors attended a training on assent based treatment.

VALUE AND COST COMPARISONS

ACCEPT's home-based service rates for member districts are 10% – 55% lower than the rates of comparable private agencies. Some area agencies charge \$250 per hour for a functional behavioral assessment (FBA) compared to ACCEPT member district rate of \$142 per hour. A typical FBA requires 14-16 hours so the savings for a district can be over \$1,700 for a single assessment.



CONSULTATION AND EVALUATION SERVICES

ACCEPT offers a variety of consultation services and technical assistance to help school districts build their capacity to meet the needs of diverse student populations. Our team of expert consultants works with districts to improve and enhance a range of special education programs and services with a strong emphasis on collaboration and long-lasting partnerships. Our goal is to support districts in developing high-quality, sustainable special education programs and services in the most efficient and economical way possible.

Our school consultation team provides both student-specific and program-wide consultation services focusing on evidence-based interventions for specialized student populations, assessment methods, implementing specialized curricula, and development of behavioral supports. A variety of evaluation services are also available.

CONSULTATION SERVICES

Program Consultation for Special Populations (e.g., Autism programs, Therapeutic programs)

- Trauma-Sensitive Schools Consultation
- Behavioral Consultation
- Augmentative and Alternative Communication (AAC) Specialist Consultation
- Transition Specialist Consultation

SPECIAL EDUCATION PROGRAM EVALUATION SERVICES

Special Education Program Evaluations: e.g., Autism programs, Therapeutic programs, Inclusion services, Transition programs, Inclusive Early Childhood programs

- Student Evaluation Services
- Transition Assessments
- Functional Behavior Assessments/Trauma-Informed FBA
- Psychological Assessments
- Augmentative and Alternative Communication (AAC) Assessments
- Speech/Language Assessments
- Occupational Therapy Assessments
- Physical Therapy Assessments

VALUE AND COST COMPARISONS

ACCEPT's consultation and evaluation services rates for member districts are 25% – 30% lower than the rates of comparable private agencies. For non-member districts, rates are 10% – 15% lower than private agencies.

VHS (VIRTUAL HIGH SCHOOL)

VHS provides districts with a wide range of high quality online courses that offer flexible credit recovery, opportunities for accelerated students, unique electives, career-focused coursework, summer courses, and more.

VHS is also well-suited to the needs of students at ACCEPT High School Academy. ACCEPT teachers customize the courses utilizing blended learning that accommodates the individual learning needs of each student. The VHS modules are rigorous and meet graduation credit and syllabus requirements. There were 412 students participating in these courses this past year. More information is available at <https://www.vhslearning.org/>.

Some of the courses the students enrolled in this year include:

- American Sign Language 1 & 2
- Animal Behavior and Zoology
- Architectural CAD
- Art History
- Biochemistry
- Bioethics
- Business Law
- Business Math
- Chinese 1
- Constitutional Law
- Criminology
- Differential Calculus
- Economics
- Entrepreneurship
- European History
- Film and Literature
- Forensic Science
- Genes and Disease
- Investing in the Stock Market
- Java and Python Programming
- Journalism
- Law and U.S. Legal System
- Literature of the World
- Macroeconomics
- Marketing
- Music Theory
- Nuclear Science
- Oceanography
- Philosophy
- Portuguese
- Psychology of Crime
- Screenwriting
- Sports and Society
- Statistics
- Sports and Society
- Statistics

VALUE AND COST COMPARISONS

As part of the Consortium, teaching member districts paid \$180 per VHS seat. Rates for districts who purchase seats only range from \$310 - \$350 depending upon the number of seats purchased. These rates compare very favorably to a district's costs for in-school classrooms, especially in classes with lower enrollments. In addition, a high quality online course is an efficient solution for students who have individual needs that do not fit the usual school offerings and calendar.

TRANSPORTATION



ACCEPT has provided specialized transportation services for member districts for more than 40 years.

Each day more than 155 students are picked up at their homes, delivered to over 69 destinations, either their special education program at ACCEPT or other schools in Massachusetts, and safely returned home at the end of the day. A fleet of 81 vans, 55 drivers and 22 monitors meet the individual needs of each student ensuring a comfortable and positive experience.

Each van transports 1-8 students creating a complex system of routing, varying by start and end times of programs, pick up and drop off locations, and daily variations due to absences, snow days, differences in school calendars location by location. Communication is an ongoing challenge, with no room for error.

Transportation routing software, GPS systems, cameras, and mobile devices all enhance safety and efficiency. We are currently in the process of restructuring the department to be better able to serve our families and districts.

VALUE AND COST COMPARISONS

ACCEPT utilizes a cost per mile model to price transportation for member districts. Estimates are calculated annually providing districts with the data necessary to budget for the year. The cost per mile model allows districts to more easily submit for transportation reimbursements. The driver and vehicle shortage continues to impact our transportation services, limiting our ability to provide anything more than out of district transportation services. We monitor the changes in the industry and seek efficiencies that will help maintain high-quality service while also reducing costs where possible.

MEDICAID REIMBURSEMENT

Since 1994, ACCEPT Education Collaborative has been assisting both member and non-member districts with recouping money spent on school-based health and related medical services through the School-Based Medicaid Program (SBMP). Over the past 31 years, this program has returned over \$87 million to participating cities and towns.

ACCEPT's School-Based Medicaid services include:

- Program set-up & ongoing maintenance
- Quarterly identification of eligible students
- Submission of electronic claims for direct services
- Follow-up with out-of-district programs to obtain service documentation for students
- Preparation of quarterly administrative activity claims on behalf of the districts
- Calculation of annual Direct Service Cost Reports
- Ongoing assistance with understanding constantly evolving state regulations and program changes
- Creation of custom reports for districts
- Unlimited training for district staff on the Medicaid reimbursement process and systems
- Assistance for the district if selected for an audit



DISTRICT-BY-DISTRICT REIMBURSEMENT DETAIL

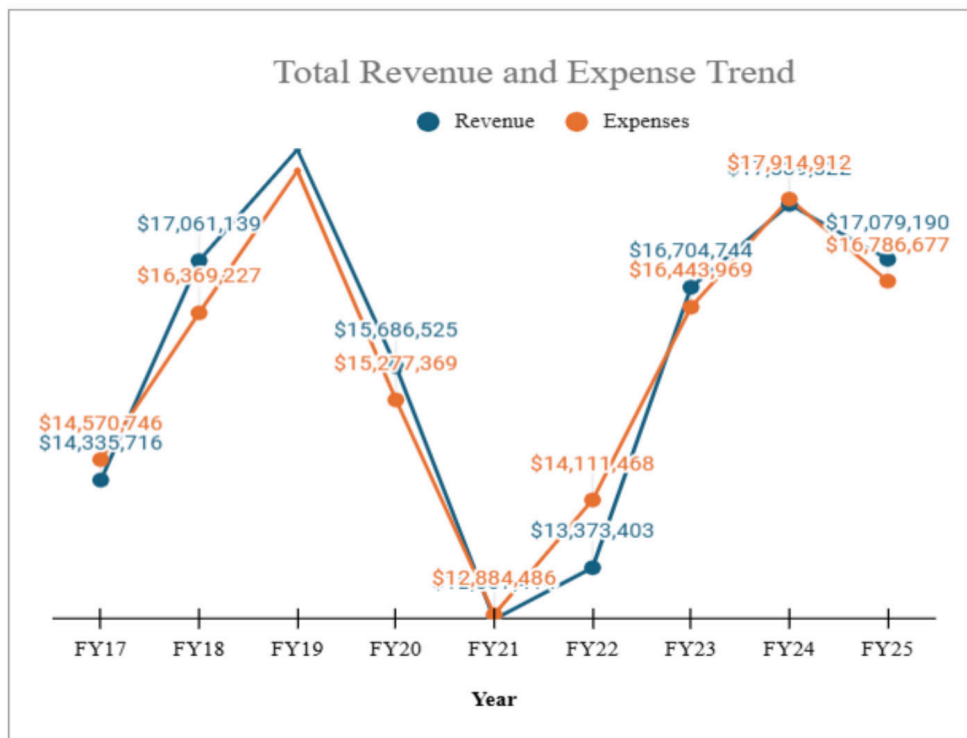
School District	Direct Service Reimbursement	Administrative Activity Reimbursement	Total Payments FY25
Acton Boxborough Regional	\$161,074	\$129,749	\$290,823
Ashland	\$4,732	\$53,081	\$57,813
Bedford	\$58,608	\$105,259	\$163,867
Carlisle	n/a	\$6,058	\$6,058
Framingham	\$424,794	\$853,664	\$1,278,458
Franklin	\$17,572	\$207,739	\$225,311
Holliston	\$56,631	\$83,852	\$140,483
Hopkinton	\$26,635	\$60,250	\$86,885
Lincoln/Sudbury Reg.	n/a	\$106,292	\$106,292
Littleton	\$8,664	\$42,161	\$50,825
Medfield	\$10,572	\$37,403	\$47,975
Medway	\$2,820	\$47,208	\$50,028
Millis	\$3,569	\$43,958	\$47,527
Natick	\$137,664	\$211,171	\$348,835
Northern Berkshire Reg.	n/a	\$12,554	\$12,554
South Middlesex Reg.	\$1,621	\$20,480	\$22,101
Sudbury	\$125,184	\$54,970	\$180,154
Walpole	\$336,750	\$174,795	\$511,545
TOTAL	\$1,376,890	\$2,250,644	\$3,627,534

FINANCIALS

	Revenue	% of Total Revenue	Expense	% of Total Expense
School Year Tuition and Services	\$ 9,780,458	57.27%	\$ 9,640,818	57.43%
Transportation	\$ 4,853,889	28.42%	\$ 5,008,198	29.83%
Home-Based	\$ 366,411	2.15%	\$ 363,708	2.17%
Professional Development/ Consulting	\$ 313,873	1.84%	\$ 293,054	1.75%
VHS	\$ 115,420	0.68%	\$ 99,364	0.59%
ELI	\$ 238,860	1.40%	\$ 257,208	1.53%
Summer ESY	\$ 1,106,850	6.48%	\$ 856,452	5.10%
Medicaid Reimbursement	\$ 210,038	1.23%	\$ 174,484	1.04%
Administration	\$ 93,391	0.55%	\$ 93,391	0.56%
Total	\$ 17,079,190.00	100%	\$ 16,786,677.48	100%

As it relates to the financial audit, the report states: "The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under Government Auditing Standards."

ACCEPT Education Collaborative Financial Audit conducted by CBiz LLC, Fiscal Year 2025 (p.66)



2024-2025 ADVISORY COMMITTEE MEMBERS

Job-alike advisory groups, composed of district leaders in Special Education, Curriculum, and Business Operations provide input into the development and implementation of ACCEPT programs and services. Members work collaboratively, as a professional learning community, throughout the school year to support each other as 21st century educational leaders.

SPECIAL EDUCATION

Dr. Donna Flaherty, ACCEPT Facilitator
 Brittany Hawkins, Ashland
 Kate McCarthy, Dover-Sherborn
 Natalia Kierul, Framingham
 Paula Marano, Franklin
 Jessica Beattie, Holliston
 Abby Hanscom, Hopkinton
 Mary Bruhl, Medfield
 Ryan Place, Medway
 Nealy Urquhart, Millis
 Erin Miller, Natick
 Stephanie Wyman, Needham
 Mary Lammi, Needham
 Michael Dolan, South Middlesex Regional
 Stephanie Juriansz, Sudbury
 Jeffrey Lappin, Sudbury
 Kathleen Bernklow, Wellesley
 Sherrie Stevens, Westborough

CURRICULUM LEADERSHIP

Dr. Gina Flanagan, ACCEPT Co-Facilitator
 Gabrielle Abrams, Medway
 Michael Caira, Ashland
 Denton Conklin, Dover-Sherborn
 Amy Bright, Framingham
 Dr. Tina Rogers, Franklin
 Joanne Menard, Holliston
 Jeffrey LaBroad, Hopkinton
 Dr. Christine Power, Medfield

Maureen Knowlton, Millis
 Susan Balboni, Natick
 Carmen Williams, Needham
 Rebecca Swasey, South Middlesex Regional
 Kim Swain, Sudbury
 Sandra Trach, Wellesley
 Daniel Mayer, Westborough

BUSINESS OPERATIONS

Donna Flaherty, ACCEPT Facilitator
 George McCormack, ACCEPT Facilitator
 Chris Mathieu, Ashland
 Dawn Fattore, Dover/Sherborn
 Lincoln Lynch, IV, Framingham
 Jenna Melotti, Franklin
 Keith Buday, Holliston
 David Jordan, Holliston
 Susan Rothermich, Hopkinton
 Michael LaFrancesca, Medfield
 Patricia Leonhardt, Medway
 Terry Wiggin, Millis
 Matt Gillis, Natick
 Anne Gulati, Needham
 Dolores Sharek, South Middlesex Regional School
 Anne Gulati, Needham
 Donald Sawyer, Sudbury
 Cindy Mahr, Wellesley
 Anita Patel, Westborough

THANK YOU

To the many organizations & businesses who provided vocational experiences & community outings.

- ConnectEd & Inspired - Milford
- Cradles to Crayons - Newton
- Kidstrong Gym - Natick/Westborough
- Franklin YMCA - Franklin
- Framingham Public Library - Framingham
- PetWorld - Natick
- Blessing Barn Book & Retail Store - Mendon
- Millis Library - Millis
- Sunrise Senior Living - Wayland
- Milford Meals on Wheels - Milford
- Medway Council on Aging - Medway
- Mass Audubon's Drumlin Farm and Wildlife Sanctuary - Lincoln
- Mass Audubon's Broadmoor Wildlife Sanctuary - Natick
- Mass Audubon's Habitat Education & Wildlife Sanctuary - Belmont
- TLC Cleaners - Medway
- Natick Pegasus Community TV Station - Natick
- Pearl Street Food Pantry - Framingham
- Restoration Project Thrift Store - Belmont
- Park St. Books and Toys - Medfield
- Walgreens - Framingham
- TC Scoops - Holliston
- Natick Service Council - Natick
- Natick Public Library - Natick
- Metrowest Medical Center - Framingham
- MetroWest K9 charitable donation of time and services
- Natick Conservation Commission Pine Hill Trail upkeep project





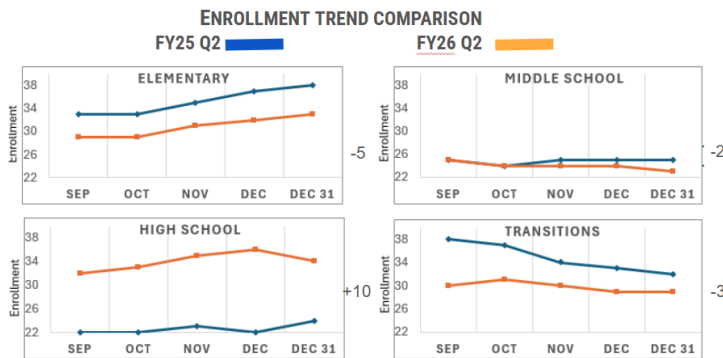
Center for Learning and Growth • 4 Tech Circle, Natick, MA 01760
 Main Office • 508.653.6776 • 508.653.0878 Fax • accept.org
 Transportation • 508.620.3875 • 508.655.5008 Fax

January 21st, 2026

To: ACCEPT Board of Directors
 From: Kathleen M. Bernklow, Ph.D., Interim Executive Director
 RE: Second Quarter Update from ACCEPT

In keeping with our collaborative agreement, I am providing a 2nd quarter program and financial update for our organization.

Enrollment for the 2nd quarter 2025-2026 school year across ACCEPT’s three special education campuses (ACCEPT Natick School, ACCEPT at Medway High School, and ACCEPT at Medway Middle School) have shown increases and decreases compared to 2nd quarter FY25. Elementary enrollment continues to lag FY 25 largely due to staffing difficulties; students have had to be waitlisted for elementary programming. Another area of decrease is the Transitions program. As previously discussed, the increased number of districts establishing their own 18-22 year old programming has resulted in a year’s long decline in enrollment, with aging out students not being replaced at the same rate by new, incoming students. Middle School enrollment in FY 26 (which includes gr. 6-7) is slightly below that of FY 25 (which included grades 6-8). FY 26 High School enrollment has increased by 10 students, 3 of whom were previously counted as MS students in FY25. This leaves a net increase of 7 *new* students at the HS versus FY 25. Enrollment as of 12/31/25 is 119 students, which is equal to FY 25, and 1.7% over our budgeted student count of 117. It is important to note that we have 3 students starting in the new year, so that we expect our total enrollment to increase to 4.3% over our budgeted student count of 117.



Our transportation department successfully onboarded **Christina Patterson** as Fleet Manager this quarter. This is an unbudgeted position which was a direct recommendation from the 2025 ACCEPT Transportation Review. This position will be added to the general ledger and funded through the “sunsetting” of an Asst. Transportation Manager position starting with the FY 2026-2027 school year. Christina brings over 10 years of transportation experience, Her expertise in fleet oversight, staff coordination, and growth management strengthens our operational foundation and enhances our capacity to scale effectively.

During Q2, transportation management conducted a comprehensive review of feedback from all key stakeholders, including office staff, drivers, parents, and in-person meetings with member districts. Based on this feedback, we have developed and initiated plans to address all reported concerns. These efforts include:

- Improved internal and external communication processes
- Streamlined and more transparent invoicing practices
- Resolution of identified operational inefficiencies
- Communication of Key Performance Indicators

As you may recall, Q2 student ridership was frozen pending the successful adjustment, staffing, and stabilization of routes. December 31, 2026 ridership was 108 riders, with an overall loss of 1.8 % (2 riders) from the beginning to the end of the quarter.

Home-Based Services for the 2025-2026 school year are currently providing direct and/or consultative services to a total of 25 students across 10 different school districts. This represents a 47% increase over the end of the 2024-2025 school year, when we were providing services to 17 students. We are currently unable to take anymore Home-based students due staffing constraints.

ACCEPT has been notified that they have not received the New Special Education Director Leadership Institute. For the first time in 23 years, the Institute will be implemented by a private company from Louisiana. While disappointed, the PD department is exploring ACCEPT's offering a New Student Services Director Institute as a fee for service. This Institute will combine leadership development, mentorship, and coaching with practical and authentic tasks such as writing a comprehensive entry plan and presenting the plan and its results; collaboration and project management/planning; the intersection of Bullying, Harassment and Title IX and how to support building leadership during investigations; understanding multilingual students and the impact of multi- language learning on assessment; managing out of district caseloads; budgeting; data analysis; and program evaluation. Additionally, the mandated full day workshops will be revised into half day workshops with more of the content being available through online platforms.

At the January 21, 2026 ACCEPT BOD meeting, the treasurer presented the FY25 Q4 report indicating that the Collaborative continues to maintain excellent cash reserves, both in cash on-hand and investment accounts. The two investment accounts continue to grow as expected. Bank reconciliation reports are up to date and are being signed and dated monthly by the Treasurer. Additionally, payments to MTRS and the state retirement system are up to date and Federal and State taxes are being paid timely with each payroll process. The Annual Financial Audit was presented to the BOD by CBiz with no findings featured in the report. Please see APPENDIX A for more detailed financial revenue and expenses information for FY 2026 Q2.

APPENDIX A
FY 2026 Q2 FINANCIAL REVENUE AND EXPENSES

REVENUE:

The revenue through December 31st 2025 was \$6,965,950 an increase of \$102,947 or 1.6 % from Q2 FY25.

DEPARTMENT	Q2 FY26	% CHANGE FROM Q2 FY25
Administration	\$ 61,908	-19%
Programs	\$ 3,355,767	7%
Transportation	\$ 1,671,891	-16%
Home Based	\$ 197,924	43%
Summer (ESY)	\$ 1,218,858	12%
VHS	\$ 103,200	-6%
ELI	\$ 163,486	68%*
PD	\$ 108,533	-27%
Medicaid	\$ 44,883	25%
Total Revenue	\$ 6,926,450	1.6%

**Q2 FY25 billing crossed into Q3.*

From a weighted hierarchy there has been an increase in Programs and Summer (ESY) of \$210,772 and \$128,851, respectively. This can be attributed to an increase in net enrollment of +2.4 students in Programs and an increase in services (e.g. 1:1) for Summer (ESY), respectively.

These increases offset a decrease in Transportation of \$309,201. The decrease in revenue is due to the reduction in ridership. However, the reduction in ridership has decreased overall costs.

CHANGE IN ENROLLMENT:

LEVEL	FY25*	FY26*	CHANGE
Elementary	38	33	-5
Middle	25	23	-2
High	24	36	10
Transitions	32	30	-3
Total	119	119	0

** 3 students start 1/5/2026*

EXPENSES:

Total expenses were \$7,675,857 a decrease of \$182,174 or 2.3%. Most of the decrease in expenses was attributable to the decrease in Transportation. Up to this point the decrease has been driven in large part by a reduction in gas and salary expenses.

Expense	Budget	YTD FY26	% used
Assessment Materials	\$ 4,000	\$ 3,953	99%
Advertising	\$ 16,700	\$ 1,885	11%
Benefits Health	\$ 1,031,080	\$ 381,630	37%
Benefits Life	\$ 1,050	\$ 311	30%
Benefits Retirement	\$ 461,435	\$ 172,022	37%
Equipment	\$ 131,750	\$ 59,112	45%
Gasb 45 (Opeb)	\$ 25,000	\$ -	0%
Insurance	\$ 470,000	\$ 262,537	56%
Medicare/Wc/Sui	\$ 349,846	\$ 141,102	40%
Utilities/Maint/Security	\$ 293,250	\$ 158,873	54%
Outside Services	\$ 935,795	\$ 481,921	51%
Prof Development	\$ 216,505	\$ 46,232	21%
Rent	\$ 882,850	\$ 486,850	55%
Subscriptions	\$ 12,850	\$ 12,781	99%
Supplies/Furniture	\$ 350,900	\$ 104,167	30%
Technology	\$ 82,326	\$ 57,171	69%
Travel	\$ 9,500	\$ 2,978	31%
Tuition Reimbursement	\$ 30,000	\$ 1,557	5%
Vehicle Fuel & Tolls	\$ 340,000	\$ 113,653	33%
Vehicle Repair & Maint	\$ 395,000	\$ 182,639	46%
Wages	\$ 12,053,729	\$ 5,004,483	42%
TOTAL	\$ 18,093,566	\$ 7,675,856	42%

SUMMARY:

The second quarter of FY26 reflects progress in enrollment, with growth across Program Tuition, ELI, and Home-Based Services. The Collaborative concluded FY25 with a modest but positive operating account. Our current financial forecast continues this trajectory, outperforming Q2 FY25 by \$285,000. The primary operational risk remains within Transportation, where continued losses are likely if ridership does not increase while keeping the same staff headcount. Also important for all Departments is keeping staffing costs level to protect margins unless there is a considerable spike or dip in enrollment.

As of December 31, the balance sheet demonstrates a strong financial position. The Collaborative holds more than \$5 million in liquid assets, providing flexibility and general stability. To put this in perspective the Collaborative could meet payroll obligations for the remainder of the year and not receive any additional funds. Both the Program and Transportation Departments operate on a consistent monthly billing cycle, and the reported figures do not yet reflect January 2026 activity.

At the close of FY25, outstanding receivables exceeded \$2 million, largely attributable to June and remaining May invoices. As of December 31, 2025, receivables have been reduced to \$438,241, with no material balances aging beyond 90 days, an indication of good cash flow management.

–

ACCEPT Education Collaborative
Quarterly Financial Review
Balance Sheet - Q2 FY26

	<u>12/31/2025</u>	<u>Notes</u>	
<u>Assets</u>			
Operating Cash	\$ 2,067,060	Mutal One Operating Cash acct	
Short Term Investment CDs	\$ 1,010,991	Mutual One - 3 new cds in FY26	
Restricted Investment CD	\$ 172,436	Mutual One - CD acct	
Accounts Receivable	\$ 438,241		
Capital Reserve Investment Fund	\$ 1,240,834	<i>Treasurer to update</i>	
OPEB Trust Fund	\$ 1,507,400	<i>Treasurer to update</i>	
Donation Fund	\$ 97,028	Mutual One Donation acct	
	<u>\$ -</u>		\$
Total Assets	<u><u>\$ 6,533,990</u></u>		\$
<u>Liabilities</u>			
Payroll Clearing <i>stale balance</i>	\$ 137,435	Waiting for audit adjustment	\$
Employee Withholding	\$ 192,688		
Prior Year Encumbrance <i>stale balance</i>	\$ 225,447	Waiting for audit adjustment	\$
	<u>\$ -</u>		
Total Liabilities	<u>\$ 555,570</u>		
<u>Fund Balance</u>			
Equity	\$ 3,882,565	not Inc grants	
Capital Reserve Investment Fund	\$ 1,240,834	<i>Treasurer to update</i>	\$
OPEB Trust Fund	\$ 1,507,400	<i>Treasurer to update</i>	
Donation Fund	\$ 97,028		
Current Operating Profit&Loss	\$ (749,407)	Operating Fund Revenue less Expenses	
	<u>\$ -</u>		
Total Fund Balance	<u>\$ 5,978,420</u>		\$
			\$
Total Liabilities and Fund Balance	<u><u>\$ 6,533,990</u></u>		

DRAFT Sudbury School Committee
Policy Subcommittee
Meeting Minutes
January 16, 2026

Members Present: Nicole Burnard, Karyn Jones
Also Present: Brad Crozier, Superintendent
Regular Session Meeting:

1. Call to Order

a. Karyn Jones opened the meeting at 11:40 a.m. Burnard and Jones confirmed being present at the meeting.

2.a.i. The Subcommittee reviewed the draft policy BDFC – Parent Advisory Councils (ELPAC). Discussion focused on the policy’s alignment with the recently adopted SEPAC policy and with guidance included in the Massachusetts Association of School Committees (MASC) policy update released this summer.

The Committee discussed whether adoption of the policy was necessary, noting that Sudbury Public Schools does not currently have an English Learner Parent Advisory Council (ELPAC). Members reviewed that the policy primarily outlines the process for establishing an ELPAC and the associated legal requirements, rather than indicating that an ELPAC is currently operating within the district. The Committee noted similarities between this policy and existing policies that describe programs that may be implemented, such as School Choice.

Jones moved to recommend policy BDFC, Parent Advisory Councils, ELPAC as presented to the School Committee. Burnard seconded the motion. Motion passes.

The following votes were recorded:

Nicole Burnard - Aye

Karyn Jones - Aye

2.a.ii. The Subcommittee reviewed the draft policy IJNDG, Generative Artificial Intelligence Policy for Teachers and Students. Discussion focused on the wide range of approaches districts have taken in adopting generative artificial intelligence policies, which vary from brief statements to more comprehensive documents outlining procedures and permitted technologies.

The Subcommittee discussed whether the draft policy should be reviewed by legal counsel, noting prior communication to the community in a fall district newsletter regarding the development of such a policy. Members expressed that the proposed policy reflects a balanced approach and represents a middle ground among policies currently adopted by peer districts.

Jones moved to recommend policy IJNDG, Generative Artificial Intelligence Policy for Teachers and Students to the School Committee. Burnard seconded the motion. Motion passes.

The following votes were recorded:

Nicole Burnard - Aye

Karyn Jones - Aye

2.a.iii. The Subcommittee reviewed draft policy IHBA, Observations of Special Education Programs. This policy was recommended for review by legal counsel following the Committee's recent adoption of the updated KI policy.

The Subcommittee reached consensus that policy IHBA should be reviewed by counsel, consistent with their recommendation. There was further consensus that the version of the policy recommended by counsel would be brought forward to the full School Committee for consideration through the standard policy adoption process.

2.a.iv. The Subcommittee reviewed draft policy AD, Mission Statement. Discussion focused on whether the mission statement should be fully rewritten or whether the current language should be retained with the addition of equity and inclusion statements.

The Subcommittee reached consensus to maintain the existing mission statement language and incorporate the equity and inclusion language into the policy.

Jones moved to recommend Policy AD, Mission Statement to the full School Committee.
Burnard seconded the motion. Motion passes.

The following votes were recorded:

Nicole Burnard - Aye

Karyn Jones - Aye

2.a.v. The Subcommittee reviewed draft policy CBI, Evaluation of the Superintendent. There was discussion of if Counsel should do a further review as it was felt there needs to be more expertise around contracts.

Jones moved to recommend policy CBI, Evaluation of the Superintendent to the full Committee.
Burnard seconded the motion. Motion passes.

The following votes were recorded:

Nicole Burnard - Aye

Karyn Jones - Aye

3. The Subcommittee reviewed policies and procedures tasked with this year to review for the District Policy Manual and School Committee Handbook. It was noted that all work has been completed.

4. Reviewed Policy Subcommittee minutes of September 5, 2025 and October 24, 2025. There was a typo in the October 24, 2025 minutes. Jones moved to approve the September 5, 2025 meeting minutes as presented and the October 24, 2025 meeting minutes as amended. Burnard seconded the motion. Motion passes.

The following votes were recorded:

Nicole Burnard - Aye

Karyn Jones - Aye

5. Jones motioned to adjourn the meeting at 12:42 PM. Burnard seconded. Motion passes.

The following votes were recorded:

Nicole Burnard - Aye

Karyn Jones - Aye

Meeting adjourned.

Minutes respectively submitted by Karyn Jones.

Education

Sudbury Public Schools Superintendent's Report

The Sudbury Public Schools continue to meet students' needs in 2025. The District implemented a new English Language Arts (ELA) curriculum for grades K-5, aligned with the Science of Reading, ensuring that evidence-based practices are embedded in our literacy instruction. The Middle School science department embraced OpenSciEd, a high-quality, phenomenon-based program that connects science practices and concepts to real-world observations. Last year, the Pre-school program was expanded and we continued to see the need for the section increase to meet the needs of Sudbury's youngest learners. The district continued to enhance its teaching and learning capacities through annual goals and professional development. Those goals help us to remain focused on working together to provide a high-quality educational experience for all students in a safe and caring environment.

SPS received a grant from the Sudbury Foundation, which enabled the district to provide tailored lessons in disability awareness in grades 3-5 during the 2024-2025 school year. Lessons included topics such as: physical disabilities, cognitive differences, autism, and anxiety. Directly teaching students about specific disabilities establishes a strong, consistent foundation for continuing education in the area of disability awareness.

We also launched the Say Something Anonymous Reporting System. Students in grades 4-8 learned how to recognize warning signs and threats—whether on social media, in school, or within the community—from individuals who may pose a danger to themselves or others. The Say Something ARS program is provided by Sandy Hook Promise (SHP), a national non-profit organization. SHP's programs are active in all 50 states, with over 21 million students and adults trained. They have a proven track record and extensive experience working effectively with children, parents, and educators to improve school safety and culture.

SPS Vision

We are committed to excellence in educating students to be knowledgeable, creative, independent thinkers who are caring, collaborative members of the school and wider communities.

SPS Theory of Action

If SPS provides differentiated high-quality instruction that is aligned with the Massachusetts learning standards for every student, maintains a safe school environment, uses data to inform instruction, and supports educators through professional development, ongoing feedback, and enhanced leadership in curriculum and instruction, then our students will be challenged and their varied learning needs met, the capacity of educators will grow, and the existing achievement gaps will narrow.

SPS 2025-2026 Goals

District Goals

Wellness: Sudbury Public Schools promote the social, emotional, behavioral and physical wellness of students.

- Strengthen and maintain district wide safety protocols through continuous monitoring to foster safe and supportive schools
 - Develop and implement a professional development module to build staff capacity in identifying signs of depression and suicide
 - Provide training for staff and instructional sessions for students on *Say Something Anonymous Reporting System*
 - Communicate the purpose and procedures for reunification to staff and families
- Enhance educator capacity to include consistent, daily SEL (social-emotional learning) practices to promote a positive climate for learning
 - Model SEL signature practices during professional development sessions and staff meetings
 - Facilitate professional learning in implementing SEL signature practices
- Examine the Facilities Conditions Assessment to plan for and address the infrastructure needs in providing a safe, healthy, learning environment in all SPS schools
 - Adjust the SPS Capital Plan as appropriate based on the Facilities Conditions Assessment

Innovation: Sudbury Public Schools implement innovative, research-based curriculum and educational practices.

- Implement High Quality Instructional Materials (HQIM) and practices using rigorous standards to ensure that learning opportunities are motivating, authentic, and develop student agency
 - Implement Expeditionary Learning (EL) grades K-5
 - Pilot EL in grade 6
 - Explore ELA implications for grades 7 and 8
 - Review and align mathematical course content with HQIM and course progressions and continue to focus on engaging and equitable mathematical experiences for all students
 - Complete the full implementation of Bridges in Mathematics 3rd Edition in all K-5 classrooms
 - Implement additional grade 7 mathematics course to align with grade level standards and practices
 - Design supplemental course for 8th grade Geometry standards to offer additional pathway into Algebra
 - Continue the 3-year implementation of OpenSciEd at the middle school
 - Realign elementary science curriculum by shifting to a phenomenon-based storyline approach, and developing guidance documents to improve alignment in science teaching and learning
 - Review and revise the scope and sequence for the middle school Health and Physical Education curricula to align with the new National Health Standards and MA Health Framework, ensuring a skills-based approach
- Develop and implement a structured, inclusive, and evidence-based curriculum review process that ensures academic programs align with current standards and meet the evolving needs of students
 - Conduct a comprehensive curriculum review of our World Languages program
 - Outline a curriculum review timeline for all core content areas
- Develop and expand digital literacy opportunities to empower students to thrive academically and navigate the digital world safely and responsibly
 - Pilot student appropriate AI tools in a managed environment to build AI literacy as a tool for learning in grade 8
 - Implement redesigned digital literacy and computer science courses for grades 6-8

Meeting the Needs of ALL Students: Sudbury Public Schools provide equitable learning experiences to engage and challenge every student.

- Develop and expand Multi-Tiered Systems of Support (MTSS) that enhance equitable, accessible, inclusive, challenging, and engaging learning experiences for all
 - Continue to develop a shared understanding of MTSS and Universal Design for Learning
 - Review, revise, and align protocols and entrance and exit criteria for Tiered Support Systems
 - Engage the early childhood community to understand their needs for equitable access.
 - Provide professional development regarding the disability awareness curriculum in grades 3-5
 - Continue the district's ADA transition work and normalize use of assistive technologies in large presentation spaces to reach all audiences
 - Deploy classroom UDL (Universal Design for Learning) instructional technology (Year 2 of 5)
- Create and support a reflective culture built on a foundation of evidence to promote continuous improvement
 - Provide coaching and collaboration time on using data to analyze and evaluate information through an equity lens to support daily instruction
 - Expand data warehousing capacity
 - Utilize the updated DCAP (District Curriculum Accommodation Plan) to inform the Student Support Teams (IST/BBST) processes
- Review specialized programs, structures, and supports to meet the learning and emotional needs of all students
 - Continue to support staff with the new IEP process
 - Revise mental health goal writing and practices
- Enhance collaboration and accessible communication with the SPS community to foster student success, build partnerships with families, and reduce barriers to inclusion
 - Review our report card and family conference documents for clarity, consistency, and accessibility regarding student academics
 - Gather feedback from families about current communication practices

As we pursue our strategic goals and objectives we also, like other school systems in the Commonwealth, continue to be challenged to balance educational needs and our desire to be an innovative school system with our fiscal responsibilities. SPS has continued to maintain our strengths and strategically implement improvements through the hard work and dedicated service of our staff members and the unequalled support of a wide range of parent and community organizations. As a district, we continue to pursue structures that meet the needs of students while controlling personnel costs.

The General Fund budget including employee benefits for FY26 is \$57,615,427, which is 3.69% greater than the prior year (FY25) General Fund budget of \$55,565,612. In FY26, Sudbury Public Schools employs 470.68 full time-equivalent employees (FTE's); this compares with 467.21 FTE's in FY25.

Our efforts to make improvements have been enhanced by the unwavering support of our parents, parent organizations (PTOs), as well as generous grants from Sudbury Education Resource Fund (SERF), and The Sudbury Foundation. These groups have contributed hundreds of thousands of dollars to provide opportunities for our students and staff that the district's budget could not support. In some cases, core opportunities (e.g. enrichment and

creative professional development) have been enhanced by local contributions. We appreciate these partnerships and the generous support of the work of our educators, which has allowed Sudbury Public Schools to continue to be a great place to learn and work.

In the space below, we offer a brief overview of our school district and invite you to visit our website at www.sudbury.k12.ma.us to learn more about SPS. On our website you will find detailed information about our school district including but not limited to individual schools, teaching and learning across the district, news and upcoming events, and the school district budget. For questions, please contact Superintendent Brad Crozier at 978-639-3211.

Student Enrollment

As of January 21, 2026, SPS enrollment in grades Pre-K to 8 was 2568 students. This is a slight decrease in enrollment from 2,586 students in the 2024-2025 school year and a decrease from our highest enrollment of 3,302 students in 2007.

Early Childhood Education

Preschool

The Sudbury Public Schools is home to an Integrated Preschool program at the Noyes and Nixon Schools. Residents may apply as tuition preschool students on a “first-come/first-serve” basis beginning in the fall of each year. If interested in a preschool application, one may register from the district website or reach out to early_childhood@sudbury.k12.ma.us or call the Early Childhood Office at: (978) 639-3204.

Our preschool is committed to a developmentally appropriate philosophy that combines a play-based, language model that is enriched by a strong academic curriculum to align with the standards that are well established by the MA State Department of Early Education & Care (EEC) Guidelines for Preschool Learning Experiences. Our preschool team believes in educating the whole child by respecting individual needs for social, emotional, physical, and cognitive development. This inclusive educational program allows all children to learn from each other while providing a lifelong foundation for respecting human differences.

The Sudbury Preschool Program prioritizes multiple learning modalities and methodologies. Each week, preschool classes attend an educational music class and a physical education/gross motor class. Social-emotional learning is the priority, while all classrooms teach literacy skills inclusively and systematically. Artistic development is deliberately planned with curriculum integration on thematic units, and science and math standards are incorporated with each unit of study, aligning to the State Standards. Outdoor learning opportunities are celebrated daily, as preschoolers play outside to practice social, gross motor, and language skills with peers. There is a combination of half and full-day programming.

Each class is staffed with a Master's level teacher and two teacher assistants/tutors, depending upon student needs. Speech and language, occupational, applied behavior analysis, and physical therapists interact with all classrooms. The professional staff includes a school psychologist, social worker, and guidance counselor, with regular consultation from a vision and mobility specialist. The preschool program regularly offers community

“developmental screenings,” where families can meet with professionals to discuss their children's developmental milestones. The preschool team is highly experienced in both general and special education practices. This integrated early childhood program is an enriching learning environment for all students.

Kindergarten

The Sudbury Public Schools provides full-day kindergarten to all students free of charge. Kindergarten registration begins in February for children who turn age five on or before September 1st for enrollment. Each year the district hosts a “Kickoff to K” evening event in January for parents and guardians to learn more about the Sudbury Kindergarten Program and ask questions. In the late spring, a ‘Kindergarten Orientation’ event is held, and this is when families and children are invited to visit their specific neighborhood school. The registration process begins with an online form accessible from the district’s “Registration” tab as of February 1st. Families will need to provide proof of residency for each child who enters the school system, even if there are older siblings who are currently enrolled. In addition, forms to address health concerns and parent information must be completed. If you have questions about the kindergarten program or your child’s readiness, please reach out to early_childhood@sudbury.k12.ma.us or call the Early Childhood Office at: (978) 639-3204.

Teaching and Learning/Curriculum

District curriculum is aligned with the Massachusetts Curriculum Frameworks. Clearly communicating with families about students’ learning is a priority for the District. Resources supporting families’ understanding and engagement with the various curricular areas can be found at <http://www.sudbury.k12.ma.us/>, under the Teaching & Learning tab.

English Language Arts

ELA Curriculum Standards emphasize complex texts and writing about reading. This year, a new program called Expeditionary Learning (EL) has been implemented in grades K-5. Educators in the elementary schools have participated in ongoing professional development with EL trainers to support the initial implementation. The ELA Steering Committee is revising the ELA line items for the K-5 report cards to reflect the DESE 2018 MA Learning Standards and the elementary curriculum. At the middle school level, instructional units utilizing differentiated text sets provide for consistency of theme and topical study, while also allowing students to read in texts that provide the optimal level of challenge. A Response to Intervention (RTI) framework is in place at each of our schools. Periodic assessments measure students’ literacy development. Literacy support for students is provided using research-based methodologies.

History & Social Sciences

The K-8 Social Studies program is designed to help students become informed in four main areas: geography, history, economics, and civics and government. The Massachusetts History and Social Science Standards define the “the primary purpose of a history and social science education is to prepare students to have the knowledge and skills to become thoughtful and active participants in a democratic society and a complex world.” Students study topics with primary sources serving as the core instructional materials. All students in grades K-8 participate in unit assessments that are based on primary source analysis through the document-based questioning (DBQ) model, supported by the Library of Congress tools for analyzing primary sources. Grade 8 students participate in a Civics

Action Project and travel to Washington D.C. for an extended exploration of national landmarks and institutions of U.S. government.

Mathematics

The Mathematics Curriculum Standards place emphasis on the mathematical practices and the development of a mathematical mindset that allows for flexibility, persistence, and application. We are currently completing our transition from Bridges in Mathematics, 2nd edition to Bridges in Mathematics, 3rd edition as our core K-5 Mathematics program. Amplify/Desmos is the core grade 6-8 Mathematics program. The core middle school curriculum is supplemented in grade eight with Algebra I and Number Theory offerings and in grade seven with Mathematics Challenge and Support.

Science, Technology and Engineering [STE]

Guided by the Massachusetts STE Curriculum Framework, the Science, Technology and Engineering curriculum remains committed to delivering a rigorous, phenomenon-based science curriculum that fosters critical thinking and student agency across all grade levels. Middle school educators continue the implementation of OpenSciEd, a high-quality, phenomenon-based program that connects science practices and concepts to real-world observations. Lessons are rooted in meaningful real-world experiences that bridge the gap between abstract principles and tangible observations. Elementary educators are utilizing a curriculum that prepares younger students for this instructional model, allowing them to take greater ownership of their learning through investigation, questioning, and drawing conclusions. This transition is supported by the Science and Engineering Curriculum Specialist and the Instructional Coach, who provide curriculum development, materials management, targeted professional development, and co-teaching/planning to ensure instructional success.

Digital Literacy and Computer Science

Massachusetts learning standards call for the integration of technology in all content areas as well as standards specific to Digital Literacy and Computer Science.

Kindergarten and first grade students use devices for learning activities that support the content. Through repetition and established routines, students gain independence with the devices while learning to problem solve and navigate online. Students in grades 2-8 participate in a 1:1 Chromebook program. These devices are used by students to produce work, collaborate with others, and support workflow. Google Classroom and Schoology, our online learning management systems, are used by students, educators, support staff, and parents to facilitate home/school communication. The district has invested in instructional online subscriptions to support student learning. The Instructional Technology Curriculum Specialists design professional development to support teachers to purposefully integrate technology across all content areas.

Unified Arts

Art, Music, and World Language are critical components of Sudbury's Unified Arts curriculum in elementary and middle school grades. Spanish instruction is provided to all elementary students in grades 1 through 5. Middle school students elect either French or Spanish and proceed with their study of a world language in grades 6 through 8. Elementary band and orchestra, as well as middle school band, orchestra, and chorus, are quality elective programs in our schools. Students participate in visual arts in grades 1 through 8.

Health and Wellness

The Sudbury Public Schools Health and Wellness Program is guided by the Massachusetts Curriculum Framework for Health and Physical Education, the National Health and Physical Education Standards, and the Collaborative for Academic, Social, and Emotional Learning (CASEL) framework. Together, these guiding documents emphasize self-awareness, self-management, responsible decision-making, social awareness, and relationship development. Students in grades K–8 participate in physical education aligned with state and national guidelines that build movement skills, physical fitness, teamwork, and confidence for lifelong wellness. Middle school students engage in health education for one trimester each year, with an emphasis on practical, skills-based learning that supports healthy choices and well-being. Students in PreK-8 develop social-emotional skills through explicit instruction and ongoing practice embedded in daily classroom routines and learning experiences.

Student Assessment

As part of the Education Reform Act of 1993, the State Board of Education instituted a system of student assessments. SPS students in grades 3-8 take MCAS in English Language Arts and Mathematics. Additionally students in grades 5 and 8 take MCAS in Science, Technology and Engineering. Eighth graders also take the Grade 8 Civics MCAS assessment.

English Learners are assessed each winter using the ACCESS assessment. This assessment measures student learning in the four language domains of Listening, Speaking, Reading, and Writing. Results are used to help families and educators understand students’ current level of English language proficiency, and serves as one of the measures used to determine whether students are prepared to exit English language support programs.

State assessments are designed to help identify those students who need improvement in various subject areas and to provide information on those specific areas on which to focus curricular improvement efforts.

The Schools

The Education Reform Act of 1993 established School Councils at all schools in the Commonwealth. Each School Council is co-chaired by the building principal with membership that includes parents, teachers and community members. The Council assists the principal in identifying educational needs of the students, reviewing the annual school budget, and formulating a School Improvement Plan (SIP). The Council and the principal are responsible for the adoption of educational goals for the school and formulation of a plan to advance such goals and improve student performance.

Sudbury has a tradition that welcomes parent involvement in our schools. Parents are active supporters of many of our programs and countless activities within individual classrooms. Each of our schools has an active parent organization that provides a formal way for parents to be involved in Sudbury’s schools.

As of 1/22/26

School	Grades Served	Enrollment	Administration
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Ephraim Curtis Middle School	6 - 8	861	Jeff Mela, Principal Angela Menke, Assistant Principal Brian Menna, Assistant Principal Annya Pedreschi, Special Education Administrator
Josiah Haynes Elementary School	K - 5	377	Bryant Amitrano, Principal Christine Maus, Assistant Principal
Israel Loring Elementary School	K - 5	433	Sara Harvey, Principal Michelle Savage, Assistant Principal
General John Nixon Elementary School	PK - 5	360	Susan Woods, Principal Sarah Daggett, Assistant Principal
Peter Noyes Elementary School	PK - 5	524	Amy Mulkerin, Principal Beth Ludwig, Assistant Principal

The Sudbury Education Resource Fund (SERF)

The Sudbury Education Resource Fund (SERF) is a non-profit, tax-exempt organization that awards education-related grants to the Sudbury PK-12 public schools. SERF coordinates a bank of resources and expertise, providing grants for educational pursuits, curriculum support, student enrichment, and professional development. SERF has granted over \$241,618 to Sudbury's schools in the last five years alone. Membership in SERF is open to all individuals interested in contributing their time and energy. SERF continues to be an extremely valuable resource for enriching all aspects of the educational experience of students in Sudbury Public Schools. Further information regarding SERF can be found at: info@serfsudbury.org.

METCO Program

The Metropolitan Council for Educational Opportunity (METCO) was created in 1966 by urban and suburban educational collaborators who believed that all children should have access to quality education in suburban school annually. The 2019-2020 academic year marked the first time Sudbury Public Schools METCO Program enrolled kindergarteners due to a policy change by the Sudbury School Committee. Students completing grade 8, and any other student(s) leaving the Sudbury METCO Program, are replaced with the number of new students needed to maintain enrollment for the next academic year.

Leslie Smart is the METCO Director for SPS K-8. She began her tenure in September 2022. The METCO Program Coordinator for the Ephraim Curtis Middle School provides direct services to students from Boston during the school day and communication with parents and teachers, as well as being a liaison between the middle school students, faculty, staff, and families and the METCO Director.

Sudbury Public School students who reside in Boston participate in a variety of activities offered by Sudbury Public Schools. Sudbury METCO parent meetings are held in person in Boston and virtually several times per year; including an annual School Committee meeting. The meetings provide families from Boston an opportunity to discuss issues that are relevant to their children's academic progress and social-emotional well-being.

SEPAC

Massachusetts General Law 71B and 603 CMR 28 requires that every district and their school committee establish and support a Special Education Parent Advisory Council (SEPAC). Its duties include but are not limited to advising the school committee on matters that pertain to the education and safety of students with disabilities and meeting with school officials regularly to participate in the planning, development, and evaluation of the District's special education programs.

Special Education

The Sudbury Public Schools strives to offer the highest quality programming that will allow our students to participate in their neighborhood schools. Students' educational opportunities vary from full inclusion programs to specialized classrooms to support a host of learning needs and styles. Programming is available beginning at age 3 and ending at age 14 when students advance to Lincoln Sudbury Regional High School.

The district continues to focus on inclusionary practices that permit students with disabilities to have access to the general curriculum and school community. While the law states that all communities must place students in the least restrictive environment, the district recognizes the positive opportunities that result when students with disabilities participate in the general education classroom and when the curriculum has a universal design of learning for equitable access. All schools strive to establish inclusionary opportunities for students, and enriched educational experiences for all students are a priority.

The district continues to focus on the development of district-wide tiered systems of support to meet the social, emotional, and behavioral needs of all students. A tiered system of support is defined as a data-driven, prevention-based framework for improving learning outcomes for every student through a layered continuum of evidence-based practices and systems. The district created a district-wide team, including consulting experts, to examine data and identify areas of social, emotional, and behavioral needs impacting school safety or access to education. The systems of support are continuously being updated and adjusted.

The Sudbury Public Schools strive to be inclusive and child-centered environments where individual learning needs are met. The classroom is the best location for students to be nurtured in order to develop into able learners. The multiplicity of programs in the schools offers a spectrum of learning options and a continuum of service delivery in order to provide for the varied needs and learning styles of our special education students. The preschool program, at the Peter Noyes and Nixon Schools, supports students with and without disabilities from age 3 until the transition to Kindergarten. Every elementary school hosts a learning center model with one or more specialized programs. Program strands at the elementary level continue to the middle and high school. Programs support students with significant learning, social and/or emotional challenges. The success of the programs can be attributed to the excellent teachers who continue to build their repertoire of skills. These programs allow more students to remain in their neighborhood schools, enhancing the Sudbury Public Schools for all students.

Professional Development

The Sudbury Public Schools support professional development as a key strategy for maintaining excellence in teaching. Two full-days for professional development workshops, in-service workshops throughout the year, ongoing support for conference attendance, and teacher leadership teams are some of the strategies used to grow the capacity of SPS educators. New teachers to Sudbury schools participate in a multi-day induction program customized to enhance their understanding of Sudbury's learning expectations and resources. Veteran teachers assume the role of mentors for newer teachers, forming professional relationships that benefit both new and veteran teachers. Sudbury educators are committed to attending a 30-hour course in IDEAS (Initiatives for Developing Equity and Achievement for Students), a program that explores racial identity development and promotes international vision within our curriculum. Additionally, Sudbury teachers assigned an EL (English Learner) student continue to engage in a rigorous 3 credit program of studies in order to earn the SEI (Sheltered English Immersion) Endorsement required by the state.

The Sudbury Public Schools implemented an Improved Learning for All (ILAP) plan. ILAP is a professional growth model that utilizes early-release days approximately twice per month, enabling educators to attend carefully planned work sessions. ILAP days foster collaborative group activities within and across schools, grade levels, and disciplines to help accomplish district-wide and school goals.

Retirees

The following SPS team members retired during the past year – Faith Chen, Leslie Dooley, Eddie Good, Marilyn Holmes, Meg Mephram, Meg Shelley and Caron Warren.

Years of Service Awards

On Opening Day in August of 2025 we had the honor and pleasure to acknowledge the following SPS team members: Kelly Chavero and Jonathan Hoeman completed 30 years of service; Anneke Bartelsman, Jennie Brannen, Jennifer Cronin, Kim Doherty, Wendy Gilman, Brian Grigsby, Lauren Jurgens, Sarah Rivera, Robin Sallèse and Marlo Strout completed their 20th years of service and Colleen Callahan, Lindsey Carapezza, Jessica Dankner, Danny Garrigan-Byerly, Rani Kallarackal, Michelle Noke, Cathleen Reynolds, RL Sarafconn, Ellen Vedora and Julie Whitehead completed their 10th year of service to the students and schools of Sudbury.

Respectfully submitted,
Brad J. Crozier, Superintendent

SUDBURY SCHOOL COMMITTEE

Karyn Jones, Chairperson

Jessica McCready, Vice Chairperson

Nicole Burnard

Julie Durgin-Sicree

Elizabeth Sues



SUDBURY PUBLIC SCHOOLS

Office of the Director of Business and Human Resources

To: School Committee

Date: 1/15//26

RE: FY26 Accounts Payable & Payroll Warrants Processed

With the required School Committee approvals received, the following Accounts Payable Warrants and Payroll Warrants were processed for payment during the current period:

<u>Date:</u>	<u>Warrant Type:</u>	<u>Warrant #:</u>	<u>Amount \$:</u>
1/8/26	Accounts Payable	1238	\$5,381.86
1/8/26	Accounts Payable	1237	\$351,051.60
12/24/25	Accounts Payable	1236	\$1,809.90
12/24/25	Accounts Payable	1235	\$202,957.28
12/18/25	Accounts Payable	1234	\$152,931.71
12/18/25	Accounts Payable	1233	\$19,708.10
12/18/25	Accounts Payable	1232	\$75.00
1/2/26	Payroll	P/R 1/8/26	\$1,634,233.21
12/19/25	Payroll	P/R 12/24/25	\$1,587,149.47

Donald R. Sawyer
Director of Business and Human Resources

Sudbury School Committee
Meeting Minutes - DRAFT
December 8, 2025

Members Present:

Karyn Jones, Chair
Jessica McCready, Vice Chair
Nicole Burnard
Betsy Sues

Also Present:

Brad Crozier, Superintendent
Annette Doyle, Assistant Superintendent
Don Sawyer, Director of Business and Human Resources

Laura Brande, Assistant Director of Student Services
Lauren Egizio, Humanities Curriculum Coordinator
Stephanie Juriansz, Director of Student Services
Andrea Kraemer, SEPAC Co-Chair
Kate Mellon, SEPAC Co-Chair
Annya Pedreschi, Team Chair and Special Education Administrator
Karen Wolfson, Math Curriculum Coordinator
Andy Sheehan, Sudbury Town Manager
Victor Garofalo, Assistant Town Manager/FD

Open Regular Session

Chair Karyn Jones opened the regular session meeting at 7:01 p.m. She performed a roll call vote of the Committee to confirm their presence.

ROLL CALL VOTE:

Jessica McCready: Present
Betsy Sues: Present
Nicole Burnard: Present
Karyn Jones: Present

1. Public Comment
 - a. Kay Bell, Sudbury resident, spoke about SPS Policy JRA - Student Records, and requested that a future agenda item be added to discuss the safeguards in place to protect student privacy.

2. Special Matters
 - a. ELA (EL) Update and Math Course Sequence Update
 - i. Ms. Egizio shared a presentation outlining the EL implementation and pilot update.
 - ii. Highlights included an update on the implementation of the EL curriculum, professional development, coaching, assessments and classroom use. Examples

of EL instruction in practice and next steps were outlined including monitoring, data review and a grade 6 pilot.

- iii. Questions from the Committee surrounded the grade 6 pilot, whether lessons learned from the elementary rollout could inform implementation, whether the grade 6 timeline will mirror prior rollouts, and plans for future expansion. They also asked whether we sought feedback from staff and students on the new program, details on the transition from Grade 5 to Grade 6, how the School Committee can support teachers—particularly regarding budgetary impacts and meeting the 60-minute daily protocol and the pacing of modules.
- iv. Ms. Wolfson shared an update on the Middle School Math Progressions.
- v. Highlights included an update on middle school math pathways, including current enrollment and plans for grades 7 and 8. Also included was an outline on the 8th grade geometry option, student placement and assessment process.
- vi. Questions surrounded math placement and support, the number of students in grade 7 math, whether students transition between placements, and how many are enrolled in Algebra I. They also asked about the use of asynchronous learning, how struggling grade 8 students are being monitored, and requested updates on the grade 6 pilot.

- b. Student Services Report including Sudbury Special Education Advisory Council Report
 - i. Stephanie Juriansz introduced Laura Brande, Annya Pedreschi and the SEPAC Co-Chairs, Andrea Kramer and Kate Mellon.
 - ii. She then presented the annual Student Services Update which covered special education responsibilities and a review of services supporting students and families. Highlights included trends in special education and mental health needs, updates to programs and curriculum, student growth outcomes and MCAS results.
 - iii. The Committee asked questions about full inclusion, including what materials would best support special education staff, how collaboration occurs across the district, how Student Services is consulted during new curriculum adoption, and whether teams have adequate meeting time to support this work.
 - iv. SEPAC Co-Chairs Andrea Kramer and Kate Mellon presented the annual survey distributed to parents.
 - v. Questions related to who received the SEPAC survey and the disability curriculum was asked.

3. Business and Policy Matters

- a. Appointment of Town Manager to SPS Negotiations / Labor Relations Subcommittee
- b. Due to a concern raised by a member regarding the vote to appoint the Town Manager to the Negotiations/Labor Relations Subcommittee during executive session, the item was added to the full session agenda for a formal vote. Legal counsel and the Attorney General's Office were consulted to review the vote and agenda language, and both confirmed there were no issues.
- c. Vice Chair Jessica McCready motions to appoint Andy Sheehan, Town Manager, to the Negotiations Subcommittee. Betsy Sues seconded the motion.
 - i. ROLL CALL VOTE:

1. Betsy Sues: Aye
 2. Nicole Burnard: Abstain
 3. Jessica McCready: Aye
 4. Karyn Jones: Aye
 - a. **Vote: 3-1.** Motion carries.
- d. FY27 Budget Workshop and Review
- i. Town Manager's Budget Guidance
 - ii. Historical Spending Comparisons and Variance Explanations
 - iii. Detail on Grants, Revolving Funds, and Other Revenue Sources, including an accounting of the Circuit Breaker and how it supports operating and capital expenses
 - iv. Administration and School Committee discussion to prioritize initiatives
 - v. Initial Budget Overview, including impacts and potential funding sources
 1. Level Service (maintaining current operations, which should be within guidance on state staffing and Sudbury Public Schools class size guidelines)
 2. Targeted Enhancements (aligned to identified priorities)
 3. Fiscally Constrained (within tiger parameters)
 - a. Budget initiatives were reviewed, including enrollment-driven items, professional development stipends, co-teaching, a world language review, early mental health screenings, provider guidance, and curriculum review. Mr. Sawyer also presented a multi-year comparison of spending by line item, including grants, out-of-district costs, and circuit breaker information.
 - b. The Committee asked questions about co-teaching models used in peer districts, the use of mental health screeners for younger learners, upcoming curriculum reviews and their costs, and the rationale for conducting a world language review.
- e. Adjournment
- i. Vice Chair Jessica McCready motioned to adjourn the meeting at 10:42 p.m. Betsy Sues seconded the motion.
 1. ROLL CALL VOTE:
 - a. Nicole Burnard: Aye
 - b. Betsy Sues: Aye
 - c. Jessica McCready: Aye
 - d. Karyn Jones: Aye
 - i. **Vote: 4-0.** Motion carries.

Respectfully Submitted,
 Julie Williams
 Executive Assistant to the Superintendent

Documents Reviewed During the December 8, 2025 School Committee Meeting

1. SC ELA Implementation Update

2. **Middle School Math Update**
3. **FY26 Fall SS Update SC 12_8 (3)**
4. **SPS FY26 FinCom Reconcile and MultiYear Worksheet**
5. **FY27 Tier I Budget Initiatives**

Sudbury School Committee
Meeting Minutes - DRAFT
December 9, 2025

Members Present:

Karyn Jones, Chair
Jessica McCready, Vice Chair
Nicole Burnard
Betsy Sues

Also Present:

Lisa Kouchakdjian, Select Board Chair
Dan Carty
Janie Dretler
Radha Gargeya
Charlie Russo
Andy Sheehan, Town Manager

Open Regular Session

1. The Sudbury School Committee will vote to enter a joint meeting with the Select Board to meet with candidates, deliberate and vote to fill a Committee vacancy.

Chair of the Select Board, Lisa Kouchakdjian opened the meeting at 7:02 p.m. She welcomed everyone to the joint Select Board and School Committee Meeting.

She then performed a roll call vote of the Select Board:

Janie Dretler: Present
Dan Carty: Present
Radha Gargeya: Present
Charlie Russo: Present
Lisa Kouchakdjian: Present

Chair of the Sudbury School Committee, Karyn Jones, performed a roll call vote of the School Committee:

Nicole Burnard: Present
Jessica McCready: Present
Betsy Sues: Present
Karyn Jones: Present

Ms. Kouchakdjian shared that each candidate will be given the opportunity to share an opening and closing statement. They will each be asked the same questions which include how the School Committee should use community feedback in consideration of educational practices, personnel management experience, views regarding School Committee goals, ways to approach your role on School Committee to reinforce budget, how to approach school budget cuts in a challenging budget season, how to prepare for the School

Committee role, how to foster healthy collaboration with School Committee members, if there were anything the candidate would add or change to the SPS goals, and what their top 3 SPS priorities would be. In addition, they were asked whether they intended to run in the future for the full time position.

The candidates who submitted applications are Ellen Lederer-DeFrancesco, Julie Durgin-Sicree and Tyler Steffey. Each candidate was then interviewed in the order their applications were received and given an opportunity to share their background and answers to the questions. .

Once the interview process was completed, the Committees then engaged in discussion. Each had an opportunity to share their thoughts on the applicants and why they would like to have them considered for the role.

Questions related to the process on majority voting was asked.

Betsy Sues motioned to appoint Julie Durgin-Sicree to the SPS School Committee for a term duration until end of May town meeting 2026. School Committee Chair, Karyn Jones seconded the motion.

ROLL CALL VOTE:

Nicole Burnard: Nay
Dan Carty: Nay
Janie Dretler: Aye
Radya Gargeya: Aye
Jessica McCready: Aye
Charlie Russo: Aye
Betsy Sues: Aye
Karyn Jones: Aye
Lisa Kouchakdjian: Aye

Vote: 7-2. Motion carries.

2. Adjournment

- a. School Committee Chair Karyn Jones motioned to adjourn at 9:03 p.m. Betsy Sues seconded the motion.

i. ROLL CALL VOTE:

1. Nicole Burnard: Aye
2. Betsy Sues: Aye
3. Karyn Jones: Aye
4. Jessica McCready: Aye

a. **Vote: 4-0.** Motion carries.

- b. Janie Dretler motioned to adjourn the Select Board meeting at 9:04 p.m. Dan Carty seconded the motion.

i. ROLL CALL VOTE:

1. Janie Dretler: Aye
2. Dan Carty: Aye
3. Radha Gargeya: Aye
4. Charlie Russo: Aye
5. Lisa Kouchakdjian: Aye

a. **Vote: 5-0.** Motion carries.

Respectfully Submitted,
Julie Williams
Executive Assistant to the Superintendent

Documents Reviewed During the December 9, 2025 School Committee Meeting

1. **Memo from SB outlining the appointment process**
2. **Application for Appointment - Ellen Lederer-DeFrancesco**
3. **Resume - Ellen Lederer-DeFrancesco**
4. **Application for Appointment - Julie Durgin-Sicree**
5. **Resume - Julie Durgin-Sicree**
6. **Application for Appointment - Tyler Steffey**

Sudbury School Committee
Meeting Minutes - DRAFT
December 15, 2025

Members Present:

Karyn Jones, Chair
Jessica McCready, Vice Chair
Nicole Burnard
Julie Durgin-Sicree

Members Absent:

Betsy Sues

Also Present:

Brad Crozier, Superintendent
Annette Doyle, Assistant Superintendent
Don Sawyer, Director of Business and Human Resources
Michelle Marino, SEA Representative

Open Regular Session

Chair Karyn Jones opened the regular session meeting at 7:00 p.m. and performed a roll call vote of the Committee:

Jessica McCready: Present
Julie Durgin-Sicree: Present
Nicole Burnard: Present
Karyn Jones: Present

1. Budget Hearing
 - a. Superintendent's Recommended FY27 Budget
 - i. Vice Chair Jessica McCready motioned to open the 2025 Budget Hearing on December 15th. Nicole Burnard seconded the motion. **All in favor. 4-0.** Motion carries.
 - ii. Superintendent Crozier provided a presentation on his recommended budget.
 - iii. The updated forecast remains over guidance but additional items are being reviewed to help close the gap. The public had an opportunity to ask questions related to the budget and no questions were received.
 - iv. Vice Chair Messica McCready motioned to adjourn the 2025 Budget Hearing at 7:20 p.m. Nicole Burnard seconded the motion. **All in favor. 4-0.** Motion carries.
2. Public Comment
 - a. None
3. Consent Calendar
 - a. Approve the updated charge of the Tri-District Calendar Review Subcommittee to enable the SPS School Committee appointees to establish a process for determining when and

how cultural and religious holidays may be added to the school calendar as no-school or half-days

- b. Approve to update the charge of the Policy Subcommittee to Review Policy IHBA
 - c. Receipt of updated Negotiations / Labor Relations Subcommittee Charge
 - d. Monthly Accounts Payable and Payroll Warrant Submissions
 - e. Minutes (11/03/25 and 11/13/25)
 - i. Edits to the Tri-District Charge were recommended and agreed upon. A question related to the Negotiations / Labor Relations Subcommittee Charge was asked and a request to pull the November 3, 2025 minutes due to a suggested review of warrant article language.
 - ii. Vice Chair Jessica McCready motioned to approve the Consent Calendar as amended. Nicole Burnard seconded the motion. **All in favor. 4-0.** Motion carries.
4. Educational and Operational Matters
- a. SEA Report (Michelle Marino)
 - i. Ms. Marino presented the final SEA report of 2025. The year was busy with school events, curriculum changes, assessments and increased social emotional and medical needs among students. Staff emphasized collaboration, resilience and a shared commitment to creating safe, welcoming learning environments. She recognized colleagues that recently reached 25 years in education.
 - b. District Reports
 - i. Director of Business and Human Resources
 - 1. Mr. Sawyer and Superintendent Crozier recently attended a Finance Committee meeting to discuss FY26 budget pressures.
 - 2. There is no update at this time from the federal level regarding state and federal grants.
 - ii. Assistant Superintendent
 - 1. Mrs. Doyle recently attended the DESE “Celebrating Academic Success” conference on December 4th.
 - 2. Fifth grade and middle school students recently participated in a Winter Concert and students will be performing at the State House Holiday Concert tomorrow.
 - iii. Superintendent
 - 1. On November 4th SPS staff participated in a CRASE Training (Civilian Response to Active Shooter Events).
 - 2. Administrators participated in lunch with leadership at Curtis Middle School where they served lunch to students.
5. Business and Policy Matters
- a. Principal Budget Discussion
 - i. Bryant Amtrano, Haynes Elementary School; Sara Harvey, Loring Elementary School, Amy Mulkerin, Noyes Elementary School, Susan Woods, Nixon Elementary School and Jeff Mela, Curtis Middle School

1. Each principal presented their school's budget priorities, highlighting efforts to build a strong school culture that supports academic success, strengthening student and community belonging, promoting community-driven school improvement, and expanding inclusive student supports, targeted interventions, and wellness initiatives.
2. Questions from the Committee surrounded use of school funds, the impact of potentially eliminating the SMILE and Explore programs, behavioral rubrics and how digital literacy is being used. Additional questions focused on mentorship programs, implications of streaming software and whether assessments will be added to ASPEN for parent review.

b. FY27 Budget Workshop

- i. The Committee asked clarifying questions about the SMILE / Explore programs, including options for continuing the program, a K-3 model, budget projections, what budget cuts could be considered to retain SMILE, and whether extra parent fees could support the program.
- ii. Members expressed concern about the potential removal of the program noting the program's value to families and the need for clear communication about the rationale behind any changes. While disappointed by the budget deficit and the possible loss of the program, the Committee acknowledged the recommendation and shared ideas for future planning.
- iii. Other budget-related questions included the UDL five-year program, a request for better understanding of Circuit Breaker funds, whether the district qualifies for relief for unexpected student needs, the potential use of the Transportation Revolving Fund, efforts to align more closely with the Town Manager's budget guidance, and possible budgetary options if a balanced budget cannot be achieved.

c. Policy BGB, Step 3: Discuss and Potential Adoption

- i. IJOA, Field Trips
- ii. KBE, Relations with Parent / Booster Organizations
- iii. KI, Visitors to the School
 1. Legal counsel reviewed these policies. They include the changes recommended by legal.
 2. A question was asked about when the policies take effect.
 3. Vice Chair Jessica McCready motioned to adopt Policy IJOA, Field Trips as presented. Julie Durgin-Sicree seconded the motion. **All in favor. 4-0.** Motion carries.
 4. Vice Chair Jessica McCready motioned to adopt Policy KBE, Relations with Parent / Booster Organizations as presented. Nicole Burnard seconded the motion. **All in favor. 4-0.** Motion carries.
 5. Vice Chair Jessica McCready motioned to adopt Policy KI, Visitors to the School as presented. Julie Durgin-Sicree seconded the motion. **All in favor. 4-0.** Motion carries.

6. Adjournment

- a. Vice Chair Jessica McCready motioned to adjourn the December 15 meeting at 9:52 p.m. Julie Durgin-Sicree seconded the motion. **All in favor. 4-0.** Motion carries.

Respectfully Submitted,
Julie Williams
Executive Assistant to the Superintendent

Documents Reviewed During the December 15, 2025 School Committee Meeting

1. Budget Hearing Legal Notice
2. FY27 Budget Hearing Presentation_251215
3. 1- DRAFT Tri-District Calendar Review Sub Committee Charge TO Amend
4. 2- DRAFT 2025-2026 Policy Subcommittee Charge Amended
5. 3- 2025-2026 Negotiations-Labor Relations Subcommittee Charge Amended
6. SC Meeting Warrant Summary - 121125
7. 110325_Sudbury School Committee Minutes_DRAFT
8. 111325_Tri-District Minutes_DRAFT
9. FY26 Haynes SIP (1)
10. School Improvement Plan Loring 2025-2026 (1)
11. Noyes SIP 25-26 (1)
12. Nixon SIP 25-26 (1)
13. Curtis School Improvement Plan 2025-26 (1)
14. 1-SudburySchoolCommitteeFY27BudgetGuidelines
15. SMILE_EXPLORE_ESY SC Memo
16. FY27 Budget Hearing Presentation_251215
17. 1- LEGAL REVIEW_ IJOA – Field Trips
18. 2- LEGAL REVIEW_KBE - Relations with Parent_ Booster Organizations
19. 3- LEGAL REVIEW_KI - VISITORS TO THE SCHOOLS



Sudbury School Committee

At-A-Glance, January 2026

ELECTED MEMBERS

Karyn Jones, Chair
Jessica McCready, Vice-Chair
Nicole Burnard
Julie Durgin-Sicree
Elizabeth Sues
Mandy Sims (resigned October 2025)

PRIMARY AREAS OF RESPONSIBILITY

1. Establishing and reviewing **POLICIES** of the District
2. Approving and monitoring the school **BUDGET**
3. Oversight of the **SUPERINTENDENT**
4. Employer of Record for **COLLECTIVE BARGAINING AGREEMENTS**

HIGHLIGHTS & KEY DECISIONS

June 16, 2025 - January 20, 2026

Awards & Recognition:

- **Department of Elementary and Secondary Education – 2025 MCAS Recognition:**
Sudbury Public Schools was honored as one of 63 districts in Massachusetts whose students met or exceeded pre-pandemic MCAS performance levels.
- **Massachusetts Commission on LGBTQ Youth Recognition:**
The Sudbury School Committee was recognized for its leadership in establishing an LGBTQ+ Parent Advisory Council and adopting the District's Gender Identity and Inclusivity Policy. The Commission praised Sudbury's commitment to authentic family engagement and noted that the district's work serves as a model for fostering belonging and supportive school communities across Massachusetts.

Leadership & Governance Actions

- **Adopted [FY26 School Committee Goals](#):**
 - Teaching, Learning and Technology
 - Family and Community Engagement
 - Fiscal Stewardship and Long-Range Planning
 - After-School Care & Enrichment
- **Adopted [FY26 Superintendent Goals](#):**
 - Student Achievement - Improving equitable, standards-aligned instruction for all students
 - District Improvement - Strengthening systems, supports, and data-informed practices
 - Professional Practice - Enhancing leadership capacity, communication, and learning
- **Additional Governance Actions:**
 - Completed the [FY25 Superintendent Evaluation](#)
 - Established a [Tri-District Calendar Review Subcommittee](#) to review religious and cultural observances across the academic calendars of Sudbury, Lincoln, and Lincoln-Sudbury, assess opportunities for greater alignment, and recommend calendar or policy updates through a collaborative, good-faith process
 - Established a [Budget Subcommittee](#) to support oversight, strategic resource planning, and development of the operating budget
 - Adopted the [2025-2026 Policy Subcommittee Charge](#), identifying policies and procedures for review and potential adoption
 - Appointed the **Town Manager** to the SPS Negotiations and Labor Relations Subcommittee
 - Established a **LGBTQ+ Parent Advisory Council**
 - [Assigned Liaison Roles](#), including new liaison roles to the Parks and Recreation Commission, Energy and Sustainability Commission, and LGBTQ+ Parent Advisory Council

- Approved naming the **Ephraim Curtis Middle School Auditorium in honor of Dr. William “Smitty” Smith**, who served as Principal from 1978 to 1983 and was the only Black principal in Sudbury Public Schools’ history. Dr. Smith devoted more than 50 years to the Sudbury community and was the founder of Race Amity Day, a member of the Human Rights Council, a coach and town board member, and a nationally recognized educator, military veteran, and civil rights leader.
- Held two Listening Sessions: One in October regarding community input regarding the calendar with Lincoln Public Schools and Lincoln-Regional High School and another listening session in November regarding all matters that fall under the School Committee
- Approved the **2026-2027 School Calendar**
- Approved the **2025-2026 Family Handbook**
- Appointed **Julie Durgin-Sicree** to the School Committee during a joint meeting with the Sudbury Select Board following the resignation of Mandy Sim

Reviewed & Adopted District Policies

To review the District Policy Manual, [click here](#).

PUBLIC PARTICIPATION & MEETINGS		
BEDH	Public Participation of School Committee Meetings	This policy was updated to reflect how meetings are currently conducted and to improve accessibility for the community. The previous policy addressed only in-person comment; the revised version establishes clear guidelines for both in-person and remote participation, supporting transparency, consistency, and broader public engagement.
BEA	Hybrid / Remote Participation at School Committee Meetings (NEW)	This policy allows School Committee members to participate remotely or in hybrid meetings under specific circumstances, in compliance with the Massachusetts Open Meeting Law. It outlines requirements for public access, technology, quorum, voting, and accessibility to ensure meetings remain transparent and fully open to the community.
EQUITY, INCLUSION & STUDENT RIGHTS		
AC	Non-Discrimination Policy Including Harassment and Retaliation	This updated policy reinforces Sudbury Public Schools’ commitment to equity and inclusion by prohibiting discrimination, harassment, and retaliation in all programs and employment practices. The revisions align district policy with current state and federal civil rights laws and clarify protections and reporting procedures.
AC-R	Civil Rights Grievance Procedure	This policy establishes clear procedures for reporting and addressing discrimination, harassment, and retaliation, ensuring protections for students and staff and alignment with state and federal civil rights requirements.
ACAB	Sexual Harassment / Title IX Policy	This policy outlines protections against sexual harassment and retaliation and establishes the District’s responsibilities for responding to and investigating Title IX complaints in compliance with state and federal law.
ACAB-R	Grievance Procedure For Complaints of Sexual Harassment Under Title IX of the Education Amendments of 1972	This procedure establishes the process for reporting, investigating, and resolving Title IX sexual harassment complaints, including supportive measures, investigation timelines, and appeal rights, in compliance with federal regulations.

IMDA	Accommodations for Religious and Cultural Observances	This policy was updated to reaffirm the District's commitment to religious and cultural inclusion. The update clarifies excused absences and adds reasonable in-school accommodations such as access to quiet prayer or reflection spaces, fasting supports during lunch, and flexibility in physical education when appropriate.
JBD	Gender, Identity, and Inclusivity (NEW)	The School Committee adopted this policy to ensure all students are supported in a safe, inclusive, and non-discriminatory learning environment. The policy provides guidance on privacy, student records, facilities, athletics, and family engagement in alignment with Massachusetts law and DESE guidance.
FAMILY & COMMUNITY ENGAGEMENT		
BDFA-E	School Improvement Plan	This policy was updated to reflect the district's current practices related to school improvement planning, including alignment with district goals, accountability measures, and reporting timelines.
BDFB	Special Education Parent Advisory Council (SEPAC) (NEW)	This policy establishes the SEPAC as a collaborative advisory body that partners with the School Committee and administration to support the planning, evaluation, and improvement of special education programs.
BDFB-R	Special Education Parent Advisory Council (SEPAC) (NEW)	This procedure defines how the School Committee, administration, and SEPAC collaborate through regular communication, annual presentations, designated liaisons, and family education opportunities to support students with disabilities.
KBE	Relations with Parent / Booster Organizations	This policy update reinforces expectations for recognized parent and booster organizations while adding new guidance to promote inclusive, accessible events and fundraising activities for all families. The revisions also clarify legal requirements related to raffles and games of chance to support transparency and compliance.
KI	Visitors to the Schools	This updated policy clarifies visitor access, check-in procedures, classroom observation guidelines, and safety expectations across all school buildings. The revisions strengthen consistency, security, and oversight while maintaining opportunities for family engagement.
SCHOOL OPERATIONS & STUDENT EXPERIENCE		
ECAB	Access to Building and Grounds (NEW)	This policy outlines when and how school buildings and grounds may be accessed to ensure student safety while allowing appropriate community use. It clarifies access during school hours, after-school hours, and non-school days, and establishes that all use must follow district procedures and be authorized when required.
EFBA	School Food and Nutrition – Meal Modifications (NEW)	This policy ensures that Sudbury Public Schools provides meal substitutions at no additional cost for students with disabilities or other documented dietary needs, in compliance with USDA and DESE regulations. Meal modifications are made on a case-by-case basis following submission of the required request form, ensuring equitable access to school nutrition programs for all students.
IJOA	Field Trips	The updated Field Trips policy reinforces the District's commitment to ensuring all students can participate in educational experiences outside the classroom. New language explicitly affirms nondiscrimination and

		equal access, including full participation for students with disabilities.
JJE	Student Fundraising Activities	This updated policy reinforces expectations for equitable and appropriate student fundraising and adds clarification that state law prohibits students and student groups from conducting or participating in raffles or games of chance.
KHB	Advertising in the Schools and Use of School Name and Logo	The School Committee adopted updates to clarify when advertising is permitted and to strengthen oversight of how district and school names, logos, and mascots may be used. The revisions establish approval requirements and branding guidelines to ensure school identities are used appropriately and consistently.

Budget, Capital, Contracts, Gifts & Grant Oversight

- Developed and approved [FY27 Budget Guidelines](#) which outlined the principals, process, and priorities to guide the development of the Sudbury Public Schools' budget.
- Approved FY27 Budget
- Approved a Power Purchase Agreement with Solect Energy at Ephraim Curtis Middle School
- **[Ratified collective bargaining agreements](#) with:**
 - Sudbury Education Association (SEA)
 - Educational Support Professional Association of Sudbury (ESPAS)
 - Sudbury Educational Association of Custodial Employees
- Approved draft of Sudbury Public Schools' Fifteen Year Capital Plan
- Reviewed and approved [Small Capital Plan](#)
- Attended Special Town Meeting where [articles](#) passed for roof replacement and repair at Josiah Haynes Elementary School and General John Nixon Elementary School
- Accepted a Sudbury Foundation grant supporting disability awareness curriculum
- Accepted donations from the Loring PTO for stairwell stickers that will reflect Israel Loring Elementary School's Core Values and promote a growth mindset and new bike racks at Israel Loring Elementary School
- Approved Sudbury Extended Day's Request for Additional Space at Israel Loring Elementary School and Josiah Haynes Elementary School
- Approved issuance of the After-School Care Request for Proposal
- Continued conversation and work regarding the Combined Facility Memorandum of Agreement with the Town

Strengthening Transparency and Community Voice

To further advance the Committee's [Family and Community Engagement goal](#), the School Committee also updated its [Handbook](#) and [District website](#) to make processes clearer, information easier to access, and opportunities for participation more transparent. These updates include:

- Clearer guidance to help Parent Advisory Councils effectively advise the School Committee and strengthen collaboration.
- A more consistent and transparent process for requesting and placing items on School Committee agendas.
- New procedures around the posting of subcommittee meeting materials to the District website.
- Adoption of a timeline requiring School Committee meeting packets to be posted by noon on the day of each meeting, giving families and residents additional time to review materials if there is an agenda item of interest and they want to provide written or public comment.
- Updated [website information](#) explaining how and when community members can participate during the policy adoption process.

Presentations and Reports Reviewed By the School Committee:

July	School Committee Training on Operating Protocols	December	EL Implementation & Pilot Update
August	School Safety, Chief of Police, Scott Nix		Middle School Math Update
October	Review of SPS Capital Plan Smile, Explorer, and Extended School Year: Summer Learning Programs		Student Services Report FY26 Update Including Sudbury SEPAC Presentation on Survey Responses and Recommendations
November	MCAS 2025 Personal Electronic Device Policy Update		School Improvement Plans: <ul style="list-style-type: none"> • Ephraim Curtis Middle School • General John Nixon Elementary School • Israel Loring Elementary School • Josiah Haynes Elementary School • Peter Noyes Elementary School

WHAT'S NEXT

- Approve FY27 Budget Book
- METCO Presentation
- Conduct the Superintendent's Mid-Cycle Goals Progress Report as part of the Superintendent Evaluation process
- Academic Benchmarking Presentation
- Prepare for Annual Town Meeting: Vote on Sudbury Public Schools Related Town Meeting 2026 Warrants

KEY INFORMATION

- WEBSITE: Please visit the [Sudbury School Committee Website](#) to learn more
- CONNECT: Please reach out. Here is our [contact information](#) and [meeting schedule](#)



DRAFT

January 27, 2026

Dear Sudbury Community,

We are pleased to share this at-a-glance update highlighting the Sudbury School Committee's work over the past several months. Our goal is to provide a clear snapshot of recent decisions, ongoing priorities, and upcoming work, while encouraging continued community engagement. **To read our At-a-Glance Newsletter, please click here.**

During this six-month period, the School Committee focused on its core responsibilities, including review and approval of the FY27 budget and budget guidelines, policy review and adoption, collective bargaining agreements, approval of grants and gifts, and coordination with Town leadership on capital planning and long-term infrastructure needs.

This work also included important governance and engagement efforts. The Committee created a Budget Subcommittee to strengthen oversight of the budget and budget development process, established a new LGBTQ+ Parent Advisory Council to support connection, inclusion, and community voice, and updated the School Committee Handbook to clarify processes that support effective participation by parent advisory councils, consistent with their role and charge.

Expanding opportunities for community participation has been a key School Committee priority. This year, the Committee adopted updated policies that formalize hybrid meeting practices and allow for both in-person and remote public comment. The Committee also introduced community listening sessions, holding one in November and planning a second session in March (date forthcoming).

Policy work continues to be a major focus of the Committee. Over the past several months, we have reviewed, updated, and adopted a number of policies to strengthen transparency, accessibility, inclusion, and alignment with current law and best practices.

We value community questions, feedback, and participation and encourage you to attend a meeting, whether in person or remotely, or to reach out to us at any time:
School-Committee@sudbury.k12.ma.us.

Warmly,

The Sudbury School Committee

Karyn Jones (Chair), Jessica McCready (Vice-Chair), Nicole Burnard, Julie Durgin-Sicree, and Elizabeth Sues

About The School Committee

Information

The School Committee consists of five members who are elected to overlapping three-year terms. The Committee is an independent body entrusted by law with broad powers and important duties. Following the enactment of the Educational Reform Act in 1993, which restructured and in some ways curtailed the powers of Massachusetts School Committees, the School Committee has the power to:

1. Establish educational goals and policies for the schools in the district consistent with the requirements of law and statewide goals and standards established by the Board of Education;
2. Review and approve budgets for public education in the district; and,
3. Select, evaluate annually, and, if necessary, terminate the Superintendent.

It is also the role of the Committee to evaluate the effectiveness of its policies and the Superintendent's implementation of them and to serve as the employer for the district for collective bargaining purposes.

Moreover, the Committee is responsible for keeping the local citizenry informed about the schools and for keeping itself and, through the Administration, the school staff informed about the needs and wishes of the public. In contrast to the Committee, which has budgetary, and policy-making authority, the Superintendent is charged with the day-to-day administration and oversight of the SPS.

The Committee typically holds public meetings two times per month during the academic year and one time each in July and August. There is opportunity for public input at each regular school committee meeting. Additionally, contact can be made with the whole Committee by emailing school-committee@sudbury.k12.ma.us (<mailto:school-committee@sudbury.k12.ma.us>) or mail:

School Committee
40 Fairbank Road
Sudbury, MA 01776

Due to the high level of phishing and other cyber-threats, please be aware that the

Recent school committee meetings may be viewed online on [SudburyTV](http://sudburytv.vod.castus.tv/vod/) (<http://sudbury.vod.castus.tv/vod/>). Meetings prior to March 2016 may be viewed on SudburyTV's older [PegCentral](http://sudburytv.pegcentral.com/) (<http://sudburytv.pegcentral.com/>) site.

Public Comment

~~The School Committee Policy BEDH – Public Comment at School Committee Meetings can be found [here](#).~~

The Sudbury School Committee welcomes public participation at its regular and special meetings. Public comment allows individuals to share perspectives on matters within the Committee's authority, including district policies, educational goals, budget oversight, and Superintendent evaluation. Public comment is not a dialogue or debate. Speakers are typically provided up to three minutes and must address remarks through the Chair in a respectful manner. Community members may participate in person by signing in upon arrival or remotely via Zoom using the "Raise Hand" feature and displaying their full name. Speakers are recognized in the order in which they sign up, with in-person and remote participants alternating during hybrid meetings. School Committee meetings are recorded and broadcast. For full guidelines, please refer to **Policy BEDH – Public Comment at School Committee Meetings** - *This will be hyperlinked to current policy. Currently, the previous policy is hyperlinked.*

Click [here](https://docs.google.com/document/d/1V5ljLxtOC_VXXBRyeKj1f19ky43BU8ysXb-oAIMI8g/edit?usp=sharing) (https://docs.google.com/document/d/1V5ljLxtOC_VXXBRyeKj1f19ky43BU8ysXb-oAIMI8g/edit?usp=sharing) to learn more about public comment on School Committee policies under review.

School Committee Roles and Responsibilities

The School Committee Roles and Responsibilities are linked [here \(/fs/resource-manager/view/abc99b3c-a202-4cf0-818c-0da1b81d0060\)](/fs/resource-manager/view/abc99b3c-a202-4cf0-818c-0da1b81d0060).

Member and Term

Ms. Karyn Jones - Chair

2024-2027

Dr. Jessica McCready - Vice Chair

2025-2028

Ms. Nicole Burnard

[Skip To Main Content](#) English

Ms. Julie Durgin-Sicree

2025-2026

Ms. Elizabeth Sues

2025-2027

Links

[About The School Committee \(/school-committee/school-committee\)](/school-committee/school-committee)

[Agendas & Minutes \(/school-committee/agendas-minutes\)](/school-committee/agendas-minutes)

[Meeting Schedule \(/school-committee/meeting-schedule\)](/school-committee/meeting-schedule)

[Policy Manual \(/school-committee/policy-manual\)](/school-committee/policy-manual)

[Presentations & Plans \(/school-committee/presentations-plans\)](/school-committee/presentations-plans)

[School Committee Communications \(/school-committee/school-committee-communications\)](/school-committee/school-committee-communications)

[School Committee Goals \(/school-committee/school-committee-goals\)](/school-committee/school-committee-goals) [School Committee](#)

[Handbook \(/school-committee/school-committee-handbook\)](/school-committee/school-committee-handbook) [School Committee](#)

[Negotiations \(/school-committee/school-committee-negotiations\)](/school-committee/school-committee-negotiations)

[School Committee Operating Protocols \(/school-committee/school-committee-operating protocols\)](/school-committee/school-committee-operating-protocols)

[Subcommittee & Liaison Assignments \(/school-committee/subcommittee-liaison assignments\)](/school-committee/subcommittee-liaison-assignments)

English

**Sudbury Public Schools
School Committee Meeting**

Date: January 26, 2026

Agenda Item: 4a

Discussion on how the Sudbury School Committee and Sudbury Public Schools may partner with the Sudbury 250 Committee in their efforts to honor the 250th anniversary of the Commencement of the American Revolution

Recommendation:

Background Information:

Attachments:

1-SPS_250_Letter.docx

2-Sudbury 250 Committee_Annual_Report_2025 (1).docx

Action: XX **Report:** **Discussion:** XX

Dear Chair Jones and Superintendent Crozier:

Greetings from the Sudbury 250 Committee (“we”, “the committee”).

The Committee has been formed by the Sudbury Select Board to commemorate the 250th anniversary of the commencement of the American Revolution. We are marking the period from the 4/19/1775 (Battles of Lexington and Concord) to 7/4/1776 (Declaration of Independence) by their 250th anniversary from 4/19/2025 through 7/4/2026.

I am enclosing the 2025 Annual Report of the Committee that shows the events that are concluded and the upcoming events.

As this is an important milestone in our nation’s history, we would like to encourage participation from all of Sudbury’s residents including students in our schools.

In this connection, I would like to explore with you and the School Committee ideas about our students’ participation. Over 15 months ago, I introduced that idea at a joint meeting of the SPS PTO Chairs with the Superintendent. As we are closing in on the 250th anniversary, this could be an opportune time to explore this idea further.

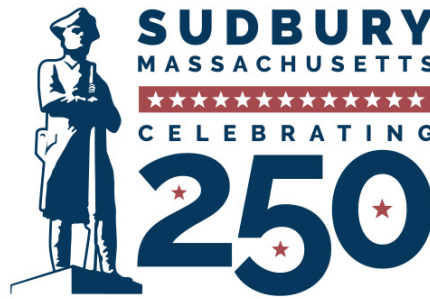
Here are some initial ideas to spur conversations.

- Any participation by students would be on their own time and would not involve SPS staff time or time away from regular curriculum. However, reflecting on the 250 years of Independence and expressing their thoughts on it could be an important aspect of their education. As SPS students range from K to 8th grade, their participation would be and should be age and grade appropriate. I am giving an example of what Sudbury 250 and Lincoln 250 did at LS Regional High School solely for illustrative purposes.
 - We formed a small group (Sudbury 250 and Lincoln 250 Chairs, LSSC Chair, Superintendent, one SC member, and a history teacher who also serves on Sudbury 250 and who is an SPS parent). We devised the idea of an essay contest. The submitted essays were evaluated by a panel of community members with expertise and experience. The essay prompt and other details are in the attached Annual Report.
 - SPS participation could be similar or quite different based on what is deemed appropriate and feasible. Student expression need not be limited to essays. It can be any of: painting, pictures, poetry, music, or any creative expression that is limited only by a student’s imagination.
 - Winning entries will, of course, gather wide recognition and will be awarded prize money.

-
- We are celebrating a 250 festival unique to Sudbury – Sudbury 250 Day on Saturday, 16th of May 2026 from 10 AM to 3 PM at the Sudbury Town Center. We will be announcing the details. We would like your help in promoting and encouraging participation from the entire SPS community.
 - As parking at the Town Center is limited, we would like to request the use of the Nixon school parking lot for community parking on 5/16/2026.

Regards.

- Radha Gargeya, Chair, Sudbury 250 Committee
<https://sudbury.ma.us/sudbury250/>



Sudbury 250 Committee

Annual Report 2025

January 18, 2026

Preamble

When in the course of commemorating the 250th anniversary of the commencement of the American Revolution, it became necessary for the Sudbury Select Board to establish the Sudbury 250 Committee on 5th of December in the year 2023, the Board submitted the following in the mission declaration: “It is anticipated that many of the observances will take place in the early spring through late winter of 2025, although the Committee may plan later events, such as the July 4, 2026 observances.”

Sudbury 250 Committee (“The Committee”, “We”) wishes to augment the commemorations by including Sudbury’s role in the events leading up to the American Revolution and beyond.

Purpose

The Committee agreed that its work will serve these purposes:

- To celebrate and commemorate the 250th anniversary of the American Revolution through various planned events,
- To have the said events take place mostly between April 19, 2025 and July 4, 2026, while encompassing events in the American Revolutionary history,
- To include and engage all Sudbury citizens, starting with our children and students,
- To tell and record stories that are untold or under-told, and
- To inform and entertain.

2025 Events and Presentations

- 3/16/2025: Inaugural **presentation** on ‘**Sudbury History: Before the Revolution**’ by **Jane Sciacca** (author and former National Park Service Ranger) on 3/16/2025 at 4 PM, Martha Mary Chapel. [The presentation is now available on SudburyTV.org](#)
- 4/19/2025: [Sudbury Minutemen March on 4/19/2025 \(250th anniversary of Patriots’ Day\)](#) at 5:45 AM, Town Center
- 4/19/2025: [Sudbury Celebrates 250 with Colonial Music](#) at 4/19/2025 at 4 PM, Martha Mary Chapel. [The concert can be viewed on SudburyTV.org](#)
- 5/18/2025: [Deborah Sampson: A Revolution of Her Own](#) – 5/18/2025 at 4 PM, Martha Mary Chapel, Presentation and re-enactment of Deborah Sampson, a hero of the American Revolution when she disguised herself as a man and joined the Patriot forces and served in the Continental Army, by **Judy Kalaora**
- 6/5/2025: **Lincoln Sudbury Regional High School – 250th Essay Contest**, Award Ceremony for 9-11 Grades, **Winners: Molly Hatcher** (Class of 2028), **Marin Raniere** (Class of 2027), **Goeun Rottman** (Class of 2027); Here is an excerpt from the essay contest announcement.

- “This is an opportunity to reflect on the historical significance of this milestone and explore how the history of our local communities has shaped our understanding of American history and the foundational ideals of liberty, equality, and democracy.

Essay Theme:

Students are encouraged to consider the following questions in their essays:

- How has living near historic sites influenced your perspective on American history and the principles outlined in the Declaration of Independence and the Constitution?
- In what ways do you see these promises fulfilled—or unfulfilled—today?
- What actions, whether personal or local, can help ensure that these founding ideals are fully realized in our communities?

Essays may explore any of these questions or other relevant themes surrounding the significance of the nation’s 250th anniversary.”

- 7/4/2025: [2025 Fourth of July Parade: Independence Day – The Sudbury Way](#):
 - Parade successfully organized by the Sudbury Chamber of Commerce
 - Sudbury 250 Committee float donated by A Blade of Grass (thanks)
 - recorded music
 - thanks to Leila Frank and community members for decorating the float, which won 2nd place

- Town Manager Andy Sheehan, Select Board Chair Lisa Kouchakdjian, Vice Chair Janie Dretler participated in the 250 regalia (T-shirts)
- Sudbury Chamber of Commerce redesigned brand new banners featuring Sudbury 250 Logo and Town businesses along Route 20 Commercial Corridor
- 9/4/2025: [Global Village](#), a production of Sudbury TV, hosted by **Soterios Zoulas**; interviews John Neuhauser and Radha Gargeya about Sudbury 250 and upcoming activities
- 9/21/2025: **Presentation and firing of cannon** to commemorate the movement of **Ticonderoga Cannon** to Dorchester Heights under the command of Henry Knox, 9/21/2025, Wayside Inn Grounds; sponsored by Sudbury 250
- 9/27/2025: **Sudbury Colonial Faire and Muster of Fyfe & Drum**, 9/27/2025, Wayside Inn Grounds; sponsored by Sudbury 250; Jan Hardebergh and Radha Gargeya at the Sudbury 250 table
- 10/25/2025: [Re-enactment of Battle of the Red Horse Tavern](#): 10/25/2025, Wayside Inn Grounds; sponsored by Sudbury 250; Jan Hardebergh and Radha Gargeya at the Sudbury 250 table
- 12/6/2025: Sudbury 250 table at the **Sudbury Holiday Village**, Fairbank Community Center; Jan Hardebergh, John Neuhauser, and Radha Gargeya at the Sudbury 250 table

2026 Upcoming Events and Presentations

- 1/25/2026: [Henry Knox and the Noble Artillery Train](#), presentation by **Steven Glovsky**, Firing of Cannon by **Crane's Third Artillery**, 1/25/2026 4 PM, Martha Mary Chapel
- 2/15/2026: Wayside Inn History, presentation by Brian Plum, 2/15/2026 4 PM, Fairbank Community Center
- 3/15/2026: Ezekiel Howe, second in command of all militia at the Battle of Concord, April 19. 1775; presentation by Tony Howes, Fairbank Community Center
- 4/12/2026: **Concert – What a Glorious Crash They Made**, Live performance of music and songs published in New England during the American Revolution, performed by **Richard Donohue**, Goodnow Library
- TBD: Indigenous Perspectives
- **5/16/2026: Sudbury 250 Day**, Sudbury's own unique festival to commemorate the 250th anniversary, Sudbury Town Center, 10 AM to 3 PM, Sudbury Town Center
- 5/17/2026: **Each Hath a Hand**, presentation by **Peter Abair**

- 7/4/2026: 2026 Fourth of July Parade to mark the 250th Anniversary of the Declaration of Independence, organized by Sudbury Chamber of Commerce, and participation by Sudbury 250 Committee

Donations and Fundraising

Sudbury Farms donated bagels, pastries, and water for the early morning (5:30 AM) attendees as the Sudbury Minutemen marched from Sudbury Town Center on 4/19/2025, the 250th anniversary of the Battles of Lexington and Concord.

Sudbury Farms donated Sudbury-250-Logo adorned cupcakes at the evening Colonial Music performance at Martha Mary Chapel on 4/19/2025.

Sudbury 250 collected donations and sold merchandise to raise funds at 2024 Colonial Faire, 2024 Holiday Village, 2025 Colonial Faire, 2025 Battle of Red Horse Tavern, 2025 Holiday Village.

Sudbury Historical Society has been gracious in displaying and selling Sudbury 250 merchandise.

We will be pursuing outside grants, sponsorships, and donations which will defray our costs.

Outreach and Engagement

The big event for 2026 is the **Sudbury 250 Day on 5/16/2026** from 10 AM to 3 PM at the Sudbury Town Center.

We are committed to including all of Sudbury. We are continuing to collaborate with our schools, community organizations, businesses, town historians, and various town committees and boards. The goal is to have the entire town and folks from neighboring towns turn up for the Sudbury 250 Day. That day and all the 250th events offer an enlivening, unifying, and reflective opportunity across Sudbury.

We are also working with the 250 Committees of neighboring towns to collaborate and coordinate our activities.

Budget and Finances

We are grateful to Sudbury Select Board and the Town Manager for allocating \$25,000 of ARPA (expand) funding to The Committee. We are grateful to the Town for allocating \$15,000 to the Committee at the Annual Town Meeting.

We are attaching a finance report for Sudbury 250. This is a preliminary report that includes some estimated expenses and does not include invoices not yet received. We

will also verify the numbers from the Town Manager's office, Sudbury Historical Society, and other receipts.

Respectfully,

Sudbury 250 Committee

Tim Cobbett –	Faculty, History Department, Lincoln Sudbury Regional High School; Sudbury resident.
Leila Frank –	ex-officio member, Select Board Office Supervisor, and Information Officer
Radha Gargeya	Chair, Sudbury Select Board
Josh Gilman -	Faculty, History Department, Lincoln Sudbury Regional High School
Jan Hardenbergh	Vice Chair, Sudbury Town Historian
John Neuhauser –	Commander, Sudbury Companies of Militia and Minute
Jim Wiegel –	Trustee Wayside Inn, VP Finance Mass Air Space Museum, Retd. Col. US Army

DRAFT

**Sudbury Public Schools
School Committee Meeting**

Date: January 26, 2026

Agenda Item: 4c

**Initial Discussion Regarding Community Feedback on Antisemitism and Racism,
and Next Steps**

District Update: Antisemitic and Racial Incidents - 2025-2026 School Year

Recommendation:

Background Information:

Attachments:

- 1- Memo
- 2- DRAFT SPS AC Policy
- 3-Newton_20Policy_20ACE

Action: XX **Report:** **Discussion:** XX

MEMO

To: School Committee Members

From: Karyn Jones

January 23, 2026

The School Committee has received community concerns regarding antisemitic and racist acts occurring within our schools. As this is an initial discussion, the goal at this stage is to better understand what is occurring across the district and to determine whether there are areas where the Committee may wish to seek additional information, clarification, or consider potential action.

As part of this initial review, I examined how other districts are approaching similar concerns. This included a review of district policies. Some districts, including Newton, maintain a separate nondiscrimination policy (often titled ACE) that includes definitions of discrimination and harassment, clarification that harassment may be severe, pervasive, or persistent, and language addressing off-campus conduct when it creates a hostile school environment. In these districts, this explanatory language is included directly within the policy itself.

In Sudbury, we already maintain multiple policies that address these issues, including Policy AC (Nondiscrimination), AC-R (Civil Rights Grievance Procedure), and ACAB and ACAB-R (Title IX). These policies provide strong legal protections and were most recently reviewed with district counsel. Policy AC was adopted by the School Committee in August 2025.

During this review, I identified a potential gap related to clarity rather than substance. While our procedures include definitions and guidance, Policy AC itself does not include brief explanatory language describing what discrimination or harassment may look like, or that a single serious incident may be actionable even if the behavior is not repeated. Several peer districts include this type of clarification directly within their nondiscrimination policy.

As a possible starting point, I drafted language that would maintain Policy AC largely as adopted while adding brief clarification consistent with current district practice and state and federal guidance. The draft does not add or remove protected classes and does not change investigation or grievance procedures, which would continue to be governed by AC-R and the Title IX policies. It is also my recommendation that any changes are reviewed by counsel through the policy adoption process, if this is a policy we would like to further review.

In addition, it may be helpful for the School Committee to receive a presentation from the administration to better understand the full context. This could include information regarding the types of antisemitic and racist incidents being reported, the district's response protocols, communication and follow-up procedures, and the curriculum and instructional resources currently provided to students related to antisemitism, racism, bias, and inclusion. It would also

be helpful to understand what professional development opportunities staff receive in these areas.

My hope is that this information would allow the Committee to engage in a more informed discussion regarding possible next steps. These could include policy clarification, additional guidance or training, the establishment of a working group, or other actions as determined by the Committee. Another option the Committee may wish to consider, depending on the discussion, is whether a resolution would be an appropriate mechanism to reaffirm district values and expectations.

It is also important to note that the School Committee has previously taken formal action in this area. In June 2020, the Sudbury School Committee unanimously adopted an Anti-Racism Resolution affirming the district's responsibility to create welcoming and inclusive school communities, provide ongoing professional development in diversity, equity, and inclusion, examine district policies for systemic racialized practices, diversify curriculum and staffing, and take an explicit stand against racism and hate. That resolution remains in effect and provides important context for the Committee's current discussion.

At this stage, this item is intended as an information-gathering conversation so the Committee can better understand current practices and determine appropriate next steps. This work would complement the Committee's ongoing efforts to listen to community concerns and ensure district policies, practices, and responses remain aligned with our values and legal responsibilities.

Proposed Timeline for Discussion

February

-Possible adoption of a resolution acknowledging community concerns regarding incidents of racism and antisemitism and affirming the School Committee's responsibility to ensure schools are safe, inclusive, and welcoming for all students. Resolution could include a commitment to reviewing district policies, curriculum, reporting protocols, and response practices related to bias and hate incidents, and to strengthening communication with families and reinforcing the district's values of equity, inclusion, and belonging.

March

- Review of relevant district policies
- Solicitation of community feedback, potentially as a topic during a School Committee Listening Session (date to be determined)

April

- Presentation from the Administration
- Review what other districts are doing like Bedford

May

- Potential creation of a Working Group

File: AC - NONDISCRIMINATION POLICY INCLUDING HARASSMENT AND RETALIATION

The Sudbury School Committee and Sudbury Public Schools (SPS) are committed to maintaining an education and work environment for all school community members that is free from all forms of discrimination, including harassment and retaliation. The members of the school community include the School Committee, employees, administration, faculty, staff, students, volunteers in the schools, and parties contracted to perform work for the Sudbury Public Schools.

The Sudbury Public Schools does not exclude from participation, deny the benefits of SPS from or otherwise discriminate against, individuals on the basis of race*, color, sex, sexual orientation, gender identity, sex stereotypes, sex characteristics, religion, disability, age, genetic information, active military/veteran status, marital status, familial status, pregnancy, or pregnancy-related condition, homelessness, ancestry, ethnic background, national origin, or any other category protected by state or federal law in the administration of its educational and employment policies, or in its programs and activities. ~~It is the policy of SPS to comply with both state and federal laws:~~

~~Sudbury Public Schools requires all members of the school community to conduct themselves in accordance with this policy.~~

This commitment to the community is affirmed by the following statements. The Sudbury School Committee commits to:

1. Promoting the rights and responsibilities of all individuals as set forth in the State and Federal Constitutions, pertinent legislation, and applicable judicial interpretations.
2. Encouraging positive experiences in human values for children, youth and adults, all of whom have differing personal and family characteristics and who come from various socioeconomic, racial and ethnic groups.
3. Working toward a more integrated society and enlisting the support of individuals as well as groups and agencies, both private and governmental, in such an effort.
4. Using all appropriate communication and action techniques to air and address the grievances of individuals and groups.
5. Carefully consider, in all the decisions made within the school district, the potential benefits or adverse consequences that those decisions might have on the human relations.
6. Initiating a process of reviewing policies and practices of the school district in order to achieve to the greatest extent possible the objectives of this statement.

The Sudbury Public Schools requires all members of the school community to conduct themselves in accordance with this policy.

It shall be a violation of this policy for any member of the school community to engage in any form of discrimination, including harassment and retaliation, or to violate any other civil right of any member of the school community. We recognize that discrimination can take a range of forms and can be targeted or unintentional; however, discrimination in any form, including harassment and retaliation, will not be tolerated.

It shall also be a violation of this policy for any school community member to subject any other member of the school community to any form of retaliation, including, but not limited to, coercion, intimidation, interference, punishment, discrimination, or harassment, for reporting or filing a complaint of discrimination, cooperating in an investigation, aiding or encouraging another member of the school community to report such conduct or file a complaint, or opposing any act or practice reasonably believed to be prohibited by this policy.

For purposes of clarity, discrimination and harassment may include verbal, physical, written, graphic, electronic, or other conduct based on an individual's actual or perceived protected characteristic that is sufficiently severe, persistent, or pervasive to interfere with or limit participation in, or benefit from, the District's programs or activities, or that creates a hostile educational or work environment.

Off-campus conduct may be addressed under this policy when such conduct creates or contributes to a hostile environment within the school community.

Allegations of discrimination, harassment, and related retaliation (except for Title IX) will be addressed through the District's School Committee Policy AC-R, *Civil Rights Grievance Procedure*.

*race to include traits historically associated with race, including, but not limited to, hair texture, hair type, hair length and protective hairstyles.

LEGAL REFS: Title VI, Civil Rights Act of 1964

Title VII, Civil Rights Act of 1964, as amended by the Equal Employment Opportunity Act of 1972 Executive Order 11246, as amended by E.O. 11375

Equal Pay Act, as amended by the Education Amendments of 1972 Title IX, Education Amendments of 1972

Rehabilitation Act of 1973

M.G.L. [71B:1](#) et seq. (Chapter 766 of the Acts of 1972)

Acts of 2022, Chapter 117

- <https://malegislature.gov/Laws/SessionLaws/Acts/2022/Chapter117>

CROSS REF: [ACE](#), Nondiscrimination on the Basis of Disability

[ACAB](#), Sexual Harassment/ Title IX Policy

AC-R, Civil Rights Grievance Procedure

[GBA](#), Equal Employment Opportunity

[IJ](#), Instructional Materials

[JB](#), Equal Educational Opportunities

SOURCE: MASC August 2022 as amended January 2025

Approved by the Sudbury School Committee on August 18, 2025

File: ACE - NON-DISCRIMINATION POLICY INCLUDING HARASSMENT AND RETALIATION

The Newton School Committee and Newton Public Schools are committed to maintaining an education and work environment for all school community members. that is free from all forms of discrimination, including harassment and retaliation. The members of the school community include the School Committee, employees, administration, faculty, staff, students, volunteers in the schools, family members participating in school meetings or school sponsored activities, and parties contracted to perform work for the Newton Public Schools.

Newton Public Schools does not exclude from participation, deny the benefits of NPS from or otherwise discriminate against, individuals on the basis of *race, color, sex, sexual orientation, gender identity, religion, disability, age, genetic information, active military/veteran status, marital status, familial status, homelessness, ancestry, ethnic background, national origin, or any other category protected by state or federal law in the administration of its educational and employment policies, or in its programs and activities, and provides equal access to all designated youth groups 1. Newton Public Schools requires all members of the school community to conduct themselves in accordance with this policy.

It shall be a violation of this policy for any member of the school community to engage in any form of discrimination, including harassment and retaliation, or to violate any other civil right of any member of the school community. We recognize that discrimination can take a range of forms and can be targeted or unintentional; however, discrimination in any form, including harassment and retaliation, will not be tolerated.

NPS will respond promptly to any reports or complaints of discrimination, including harassment and retaliation, or other violations of civil rights, pursuant to our detailed response protocol. Where it is determined that discrimination or harassment has occurred, NPS will act promptly to eliminate the conduct and will impose developmentally-appropriate disciplinary, restorative, and/or corrective action.

It shall also be a violation of this policy for any school community member to subject any other member of the school community to any form of retaliation, including, but not limited to, coercion, intimidation, interference, punishment, discrimination, or harassment, for reporting or filing a complaint of discrimination, cooperating in an investigation, aiding or encouraging another member of the school community to report such conduct or file a complaint, or opposing any act or practice reasonably believed to be prohibited by this policy.

Any member of the school community who is found, after investigation, to have engaged in any form of discrimination, including harassment or retaliation, against another member of the school community will be subject to consequences determined appropriate by the administration. Such consequences may include restorative measures and corrective action, and/or student discipline or staff disciplinary action, up to and including termination of employment.

Nothing in this policy limits any other authority of the Newton School Committee or the Newton Public Schools. This policy does not limit the authority of Newton Public Schools under its

Rights and Responsibilities Handbook or any other authority to discipline or take corrective action for educational and workplace conduct which the Newton Public Schools deems unacceptable. This policy also does not limit the authority of the Newton Public Schools to take immediate interim disciplinary action as set forth in any applicable code or policy.

Definitions

"Discrimination" and "Harassment" are defined as unwelcome conduct, whether verbal or physical, that is based on race, color, national origin, ethnicity, ancestry, religion, age, disability, genetic information, veteran status, marital status, sex, gender, gender identity, gender expression, sexual orientation, pregnancy, or pregnancy-related condition. Discrimination and/or harassment includes, but is not limited to:

- Verbal abuse or insults about, directed at, or made in the presence of, an individual or group described above.
- Any action or speech that contributes to, promotes or results in a hostile or discriminatory environment to an individual or group described above
- Any action or speech that is sufficiently severe, pervasive or persistent that it either (i) interferes with or limits the ability of an individual or group described above to participate in or benefit from employment or a program or activity of NPS; or (ii) creates an intimidating, threatening or abusive educational or working environment.

Harassment may include, but is not limited to, any unwelcome, inappropriate, or illegal physical, written, verbal, graphic, or electronic conduct, that relates to an individual's actual or perceived race, color, sex, sexual orientation, gender identity, religion, disability, age, genetic information, active military/veteran status, marital status, familial status, homelessness, ancestry, ethnic background, national origin, or any other category protected by state or federal law, and that has the purpose or effect of creating a hostile education or work environment by limiting the ability of an individual to participate in or benefit from the district's programs and activities or by unreasonably interfering with that individual's education or work environment or, if the conduct were to persist, would likely create a hostile educational or work environment. Newton Public Schools will take the appropriate action against any member of the school community who is found in violation of this policy.

"Title IX Sexual Harassment" (effective August 14, 2020) means verbal, physical or other conduct that targets a person based on their sex, and that satisfies one or more of the following:

- A school employee conditioning educational benefits or services on participation in unwelcome sexual conduct (i.e., quid pro quo);
- Any unwelcome conduct that a reasonable person would find so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the school's educational program or activity;

- Any instance of "sexual assault", "dating violence", "domestic violence", or "stalking", as those terms are defined by the Clery Act (20 U.S.C. 1092(f)(6)(A)(v)) and the Violence Against Women Act (34 U.S.C. 12291(a)(8), (10) & (30)).

Allegations of Title IX Sexual Harassment shall be reported and investigated pursuant to the Newton Public Schools Protocol for Investigating Sexual Harassment and Retaliation Pursuant to Title IX.

Resources

The Director of Human Resources is designated as the District ADA, Title VI, Title IX, and Sexual Harassment Coordinator, and Grievance Officer for the School Committee, administration, faculty, staff, volunteers in the schools, and for parties who are contracted to perform work for the Newton Public Schools, and can be reached at:

Director of Human Resources & Staffing

100 Walnut St.

Room 201

Newton, MA 02460

(617) 559-6005

The Assistant Superintendent for Student Services is designated as the District ADA, Title VI, Title IX, and Sexual Harassment and Civil Rights Coordinator for students in the Newton Public Schools. In addition, the Assistant Superintendent for Student Services is the District 504 Coordinator, and can be reached at:

Assistant Superintendent for Student Services

100 Walnut St.

Room 320

Newton, MA 02460

(617) 559-6025

Inquiries concerning the Newton Public Schools' policies and protocols, compliance with applicable laws, statutes, and regulations, and complaints may also be directed to the Director of Human Resources. Inquiries about laws, statutes, regulations and compliance may also be directed to the Massachusetts Department of Elementary and Secondary Education or the Office for Civil Rights, U.S. Department of Education, 5 Post Office Square, 8th Floor, Suite 900, Boston, MA 02109; (617) 289-0111; Email: OCR.Boston@ed.gov; Website: www.ed.gov/ocr.

LEGAL REFS.: Title VI, Civil Rights Act of 1964

Title VII, Civil Rights Act of 1964, as amended by the Equal Employment Opportunity Act of 1972

Executive Order 11246, as amended by E.O. 11375

Equal Pay Act, as amended by the Education Amendments of 1972 Title IX, Education Amendments of 1972

Rehabilitation Act of 1973

Education for All Handicapped Children Act of 1975

No Child Left Behind Act of 2001, 20 U.S.C. § 7905 (The Boy Scouts of America Equal Access Act)

M.G.L. [ch. 71B:1](#) et seq. (Chapter 766 of the Acts of 1972)

[Creating a Respectful and Open World for Natural Hair Act of 2022](#)

[Acts of 2022, Chapter 117 \(*race to include traits historically associated with race, including, but not limited to, hair texture, hair type, hair length and protective hairstyles.\)](#)

CROSS REFS: * Non-Discrimination Protocol

[Protocol for Reporting and Investigating Sexual Harassment and Retaliation Pursuant to Title IX](#)

[NPS Diversity, Equity and Inclusion](#)

Revised: October 2022 (*link updated 8-7-23)

**Sudbury Public Schools
School Committee Meeting**

Date: January 26, 2026

Agenda Item: 4d

Vote on Superintendent's Recommended Annual Town Meeting Warrant Articles

Recommendation:

Move that the Sudbury School Committee vote to approve the Superintendent's Recommended Annual Town Meeting Warrant Articles as presented and/or amended, and affirm that the Superintendent or their designee shall submit the approved articles using the Town's Warrant Article Submission Form by 12 PM on Friday, January 30, 2026 and that the Committee will receive a receipt to confirm articles were submitted.

Background Information:

Attachments:

- 1-ATM Article Form_SPS Facilities_ Building Management System Capital Repairs.docx (1)
- 2-ATM Article Form_SPS Facilities_ Fire Alarm_Emergency Lighting_BDA Installations Nixon Haynes.docx
- 3-ATM Article Form_SPS Facilities_ School Safety Enhancements.docx (1)
- 4-warrant article - Ephraim Curtis_ Solar Canopy _ 11.3.2025.docx (1)
- 5-FY27 Warrant Article, Classroom Instructional Equipment Replacement, Year 3.docx (1)

Action: XX **Report:** **Discussion:** XX

Instructions:

- 1) The **ORIGINAL, TYPED** article is to be submitted to the Select Board’s Office in final form.
- 2) Articles submitted by Boards and Committees must be signed by a majority accompanied by a copy of the vote signed by its Clerk.
- 3) **WARRANT REPORT**, briefly explaining intent and scope of article must be attached.
- 4) All monied articles must specify dollar amounts requested.
- 5) Article wording must be approved and article signed by Town Counsel before submission.

ARTICLE TITLE: Fire Alarm, Emergency Lighting and Bi-Directional Amplification System Installations at the Josiah Haynes Elementary School and the General John Nixon Elementary School.

To see if the Town will vote to raise and appropriate, or transfer from available funds, \$660,500.00, to be expended under the direction of the Combined Facility Director, for the purpose of the installation of a new addressable voice evacuation system at the Josiah Haynes School and the installation of new emergency lighting and emergency responder radio amplification systems at the Josiah Haynes and General John Nixon Elementary Schools, or act on anything relative thereto.

Submitted by the Combined Facility Director

Combined Facility Director Report:

Fire alarm systems at Josiah Haynes Elementary School is approximately 25 years old and recommended for replacement due to age and obsolescence. The fire alarm systems at the General John Nixon Elementary School (installed in 2023) are in good condition and do not require upgrades at this time. Emergency lighting systems at General John Nixon Elementary School has exceeded its useful life and is recommended for replacement or modernization. Emergency lighting at Josiah Haynes Elementary School is generally in good condition, with targeted component replacements recommended. Bi-Dictional Amplification/Simulcast system installations are recommended for both schools.

Submitted by: Sandra Duran, Combined Facilities Director

Karyn Jones, Chair

Date

APPROVED BY:

Town Counsel

TOWN OF SUDBURY WARRANT ARTICLE FORM

ARTICLE TBD

Instructions:

- 1) The **ORIGINAL, TYPED** article is to be submitted to the Select Board’s Office in final form.
- 2) Articles submitted by Boards and Committees must be signed by a majority accompanied by a copy of the vote signed by its Clerk.
- 3) **WARRANT REPORT**, briefly explaining intent and scope of article must be attached.
- 4) All monied articles must specify dollar amounts requested.
- 5) Article wording must be approved and article signed by Town Counsel before submission.

ARTICLE TITLE: SCHOOL SAFETY ENHANCEMENT.

To see if the Town will vote to raise and appropriate, or transfer from available funds, \$450,000.00, to be expended under the direction of the Combined Facility Director, for the purpose of the installation of various safety infrastructure improvements including but not limited to design and creation of a separate entrance vestibule at the Peter Noyes Elementary School; to add a pedestrian pathway and bollards at the student drop off/pickup/play area at the Peter Noyes School; to add bollards and swing gates at the student bus drop off/basketball area; and additional access control at all school entrances. This funding request will be used to implement those recommendations, or act on anything relative thereto.

Submitted by the Combined Facility Director

Combined Facility Director Report:

Representatives from the Sudbury School District and the Sudbury Police Department participated in a school safety review that resulted in the recommendation to add a secure vestibule to the Peter Noyes Elementary School; to add a pedestrian pathway and bollards at the school drop off/pickup/play area at the Peter Noyes School; to add bollards and swing gates at the student bus drop off/basketball area; and additional access control at all school entrances.

Submitted by: Sandra Duran, Combined Facilities Director

Karyn Jones, Chair	Date
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APPROVED BY: _____
Town Counsel

INSTRUCTIONS:

- 1) Articles must be provided in MS Word format. Tables and spreadsheets must be provided in MS Excel.
 - 2) Articles shall be emailed to the Select Board's Office (sbadmin@sudbury.ma.us) by the deadline provided.
 - 3) Articles submitted by Boards and Committees must be signed by a majority or accompanied by a copy of the vote.
 - 4) Please include a Warrant Report (in Word) briefly explaining the intent, purpose, and scope of article.
 - 5) All monied articles must specify the dollar amounts requested.
 - 6) Monied articles should have been submitted as either an operating or capital budget request. Include an explanation for any monied article that was not included as a capital or operating budget request.
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ARTICLE TITLE: AUTHORIZATION TO PROCEED WITH THE EPHRAIM CURTIS MIDDLE SCHOOL SOLAR CANOPY.

To see if the Town will vote to transfer the care, custody, management and control of a portion or portions of the Ephraim Curtis Middle School property located at 22 Pratts Mill Rd. Rd from the School Committee for the purposes for which it is presently held to the School Committee for general municipal purposes and for recreational purposes and also for the purpose of leasing the same to one or more solar energy electricity production entities for the installation of a solar energy facility or facilities, and to authorize the School Committee to enter into a lease or leases for such portion or portions for a term of at least 20 years from the date of commencement of commercial operations of the solar energy facility or facilities and such additional term as the School Committee shall deem appropriate, all on such terms and conditions, and for such consideration, as the School Committee deems appropriate including a power purchase agreement for electricity and/or solar energy credits; and to authorize the School Committee to grant such access, utility, and other easements in, on, and under said property as may be necessary or convenient to construct, operate, maintain, and replace such solar energy facility or facilities; to authorize the School Committee to take all actions necessary in connection therewith; and to authorize the School Committee, pursuant to the provisions of Massachusetts General Laws Chapter 59, Section 5, or any other enabling authority, to enter into an agreement for payments in lieu of taxes (PILOT Agreement) on account of such facility or facilities for a term of 20 years and such additional term as the School Committee shall deem appropriate, upon such terms and conditions as the School Committee shall deem to be in the best interest of the Town and further, to authorize the School Committee to take such actions as may be necessary to implement such agreements; or act on anything relative thereto.

There are no funds required from The Town of Sudbury for the implementation of this lease agreement.

FACILITY DIRECTOR REPORT:

A 300kW (DC) / 200kW (AC) solar generating facility is proposed to be constructed in the parking lot of the Ephraim Curtis Middle School under a Power Purchase Agreement (PPA) with a third-party developer, Solect Energy located in Hopkinton, MA. Under this agreement the Developer installs, owns, operates, maintains, and decommissions the facility at its sole expense. Sudbury purchases electricity from the Developer at pre-set rates and also receives Net Metering Credits from Eversource (the local distribution company) for supplying the purchased electricity to the grid.

This system generates power behind the meter and in the event that the Project produces Production Excess, the Parties agree that (a) Host shall be entitled to the associated compensation and/or bill credits (including but not limited to Net Metering Credits, Alternative On-Bill Credits, or Qualifying Facility compensation), and (b) such Production Excess will be transmitted into the Local Electric Utility system on behalf of and for the account of Host, and (c) Provider shall provide reasonable assistance in Host’s applying to the Local Electric Utility for the foregoing benefits.

There is no cost to the Town associated with the construction, operation, maintenance or removal of the facility. At present, solar generating facilities on municipal property that are owned and operated by a taxable entity are considered by DOER to be subject to personal property tax under M.G.L. c. 59, §2B, even if their operation is for municipal purposes. In this situation, the municipality is in effect taxing itself because any ongoing payments by the facility owner to the host municipality are typically recovered in the price of the electricity supplied. According to DOER guidance, a PILOT (Payment In Lieu of Taxes) can be negotiated by a municipality as an alternative to personal property tax with approval of its governing body. The benefits of a PILOT are:

1. A known and constant expense to the facility owner
2. Lower electricity prices for the host municipality
3. Simplified administration

The goal of this project was to generate electricity cost savings rather than tax revenue. To meet that end and comply with present Massachusetts General Laws on taxation, a PILOT will be negotiated, subject to approval by Town Meeting. The financial value to the Town from the sale of the electricity produced to the grid far exceeds any prospective tax revenue. The PILOT does not add to the pre-tax electricity price, and so provides a small additional benefit to the Town from this use of an otherwise non-producing property.

SCHOOL COMMITTEE POSITION: The School Committee supports this article.

ENERGY AND SUSTAINABILITY COMMITTEE POSITION: The Energy and Sustainability Committee supports this article.

By: _____
Sandra R. Duran, Combined Facility Director

Karyn Jones, Chair

Date

APPROVED BY:

Town Counsel

ARTICLE: SCHOOL CLASSROOM INSTRUCTIONAL EQUIPMENT REPLACEMENT, YEAR 3

To see if the Town will vote to raise and appropriate, or transfer from available funds, \$100,000 to be expended under the direction of the Sudbury Public School Department for the replacement of School Classroom Instructional Equipment in the Curtis Middle School, Haynes Elementary School, Loring Elementary School, Nixon Elementary School and Noyes Elementary School; and all expenses incidental and related thereto; or take any action relative thereto.

Sponsored by the Sudbury School Committee.

SCHOOL COMMITTEE REPORT:

The article seeks funding for the purpose of purchasing and replacing classroom instructional equipment in approximately twenty (20) total classrooms in all five (5) school buildings. Current equipment is 12-15 years old and have exceeded their useful life.

Sudbury Public Schools positions technology in instructional spaces to support communication and collaboration. The schools provide tools that support student collaboration, differentiation of instruction, and accessibility options for all students.

The District’s standard set of classroom instructional equipment includes 1) an interactive display that provides a visual resource for displaying materials to the entire class with touch components allowing students to interact with educational content with a pen or touch; 2) wireless video projection for teacher mobility around the classroom while also permitting students to project directly from their devices; 3) auditory support for classroom instruction ensuring all students can receive instruction with clarity benefitting all students regardless of whether they have an issue with hearing; and, 4) document cameras allowing for immediate presentation of non-digital resources to the classroom.

SUBMITTED BY: Donald R. Sawyer – SPS Director of Business & Human Resources
On behalf of the Sudbury School Committee:

_____ Date
Karyn Jones, Chair

APPROVED BY: _____
Town Counsel

**Sudbury Public Schools
School Committee Meeting**

Date: January 26, 2026

Agenda Item: 4e

Policy BDB: Step 2: Review, Discussion and Potential Vote for Counsel Review

- i. New - BDFC, Parent Advisory Councils, ELPAC
- ii. New - IJNDG Generative Artificial Intelligence Policy for Teachers and Students
- iii. AD, Mission Statement
- iv. CBI, Evaluation of the Superintendent

Recommendation:

Move that counsel review and provide feedback on policy IJNDG Generative Artificial Intelligence Policy for Teachers and Students as presented/amended.

Move that counsel review and provide feedback on policy CBI Evaluation of the Superintendent as presented/amended.

Background Information:

Under Policy BGB, the Sudbury School Committee follows a structured, three-step process to adopt or amend district policies:

1. **Information** – The proposed policy is distributed in the agenda packet for Committee members to review. ***(We completed this step at our January 20, 2026 meeting)***
2. **Discussion** – The policy is read and discussed at a public meeting. This includes feedback from the Superintendent and/or relevant advisory committees, and may result in suggested edits or directions for redrafting. ***(We are at this step.)***

(Modeled on BDFB – SEPAC)

DRAFT: BDFC – ENGLISH LEARNER PARENT ADVISORY COUNCIL (ELPAC)

Sudbury Public Schools is committed to providing all students with equitable access to academically rigorous curricula within a learning environment that supports social-emotional development and fosters a sense of belonging. The District recognizes the importance of partnering with families and values meaningful collaboration with parents and guardians in supporting the educational success of English Learners.

It is the general goal of the District to foster relationships with parents and guardians that encourage cooperation between home and school in establishing and achieving shared educational goals for students.

In accordance with Massachusetts General Laws and applicable state and federal guidance, the School Committee shall establish an English Learner Parent Advisory Council (ELPAC), or Multilingual Learner Parent Advisory Council (MLPAC) when required by law.

An ELPAC or MLPAC shall be established when the District:

- Operates a language acquisition program serving one hundred (100) or more English Learners, or in which English Learners comprise at least five percent (5%) of the District's student population, whichever threshold is met first; and/or
- Has a school designated as underperforming or chronically underperforming that operates a program for English Learners.

Membership shall be offered to all parents or guardians of current or former English Learners, as well as other interested parties.

English Learner Parent Advisory Councils are intended by law to advise school districts and schools regarding matters that impact English Learners. This includes, but is not limited to, providing advice on English Learner education programs; meeting regularly with school officials regarding educational opportunities for English Learners; and providing input on school or district improvement plans as they relate to English Learners.

Consistent with this purpose, the duties of the English Learner Parent Advisory Council shall include advising the School Committee on matters pertaining to the education, safety, and equitable access of English Learners, and participating in the planning, development, and evaluation of the District's English Learner education programs.

The English Learner Parent Advisory Council shall establish bylaws regarding officers and operational procedures. In the course of its duties under this policy, the ELPAC shall receive assistance from the District without charge, upon reasonable notice, and subject to the availability of staff and resources.

The District shall provide annual notification to parents and guardians of English Learners regarding the ELPAC in a language that is accessible to them.

LEGAL REFS.:

M.G.L. c. 71A, §§ 2, 6

M.G.L. c. 71B, § 3

Title III of the Elementary and Secondary Education Act

603 CMR 28.07(4)

603 CMR 28.03(1)(a)(4)

An Act Relative to Language Opportunity for Our Kids (LOOK Act), Chapter 138 of the Acts of 2017

CROSS REFS.:

BDFC-R, English Learner Parent Advisory Council (ELPAC)

IHBEA, English Learner Education

OTHER REFS.:

DESE Guidance for English Learner Parent Advisory Councils (2018)

DRAFT IJNDG – Artificial Intelligence

Sudbury Public Schools recognizes the increasing role of artificial intelligence (AI), including generative artificial intelligence, in education, work, and civic life. When used thoughtfully and responsibly, AI has the potential to enhance teaching and learning, support creativity and problem-solving, increase efficiency, and expand access to educational opportunities.

The District is committed to ensuring that the use of artificial intelligence supports high academic standards, ethical practice, and equitable access to learning for all students, including students with disabilities, multilingual learners, and other students who may rely on instructional supports or accommodations, and does not exacerbate bias, inequity, or barriers to participation.

Accordingly, Sudbury Public Schools will incorporate age-appropriate instruction related to AI literacy, ethical use, and the critical evaluation of AI-generated content into relevant aspects of the K–8 curriculum, consistent with the Massachusetts Digital Literacy and Computer Science Curriculum Framework.

Given the evolving and rapidly changing nature of artificial intelligence, the School Committee directs the Superintendent or designee to develop, implement, and periodically update developmentally appropriate administrative procedures or guidelines governing the instructional and professional use of AI by students and staff. Such procedures or guidelines shall address, as appropriate, ethical and responsible use, academic integrity and transparency, data privacy and student protections, accessibility and equitable use, and awareness of bias, accuracy limitations, and misinformation risks.

These administrative procedures or guidelines shall be reviewed regularly to ensure alignment with emerging best practices, legal requirements, and educational research, and shall be communicated to students, families, and staff through appropriate district publications, including the Family Handbook.

The School Committee retains oversight of this policy and shall periodically review the policy and any related administrative procedures or guidelines to ensure continued alignment with legal requirements, educational best practices, and community values.

LEGAL REFS.:

M.G.L. c. 71

Title I and Title III of the Elementary and Secondary Education Act

Family Educational Rights and Privacy Act (FERPA)

Children's Online Privacy Protection Act (COPPA)

IJNDB -USE OF TECHNOLOGY IN INSTRUCTION

IJNDC - ACCEPTABLE USE OF DIGITAL RESOURCES

DRAFT File: AD - MISSION STATEMENT

Mission

The Sudbury Public Schools strive to enable all students to reach their intellectual and personal potential. The school system, in partnership with families and the community, will work with integrity and respect to realize the shared vision of enabling students to become lifelong learners and effective contributors of society.

District Vision

We are committed to excellence in educating students to be knowledgeable, creative, independent thinkers who are caring, collaborative members of the school and wider communities.

Equity Statement

Sudbury Public Schools are committed to welcoming, affirming, and celebrating all students, staff, and families.

Sudbury Public Schools are committed to creating and sustaining a culture that promotes advocacy, equity, and justice for marginalized groups who have been systemically oppressed and excluded.

Sudbury Public Schools are committed to an anti-bias and anti-racist education that includes and values the perspectives and histories of diverse peoples.

Inclusion Statement

All means all.

Sudbury Public Schools is committed to being an inclusive environment where all students are full members of our school community. We hold to the belief that all individuals should be respected, valued, and included by peers, teachers, parents/guardians, and the community at large. We are an inclusive environment where all students feel safe and thrive socially, emotionally, physically and academically.

Theory of Action

If the Sudbury Public Schools provides:

- Differentiated high quality instruction

- Safe school environment
- Instructional leadership and ongoing professional development
- The use of data to inform instruction

Then:

- Students will be challenged and their varied learning needs met
- Capacity of educators will grow
- Existing achievement gaps will narrow

CROSS REFS.: IA, Instructional Goals

Approved by the Sudbury School Committee: 

DRAFT: Current File: CBI - EVALUATION OF THE SUPERINTENDENT

Evaluation can serve the purpose of helping educators and educational leaders continually improve their practice.

Through evaluation of the Superintendent, the School Committee will strive to accomplish the following:

1. Ensure the efforts of the Superintendent are focused on district goals and the standards of professional practice established by state regulation are met by the Superintendent.
2. Ensure all Committee members and the Superintendent are in agreement and clear on the role of the Superintendent and the immediate priorities among their responsibilities.
3. Provide excellence in administrative leadership of the school district.
4. Develop a respectful and productive working relationship between the School Committee and Superintendent.

The School Committee and Superintendent will periodically develop a set of goals based on the needs of the school district and in keeping with state regulations for evaluation of the Superintendent. The Superintendent's performance will be reviewed in accordance with specified goals and standards according to the evaluation cycle agreed upon with the Superintendent.

The Sudbury School Committee believes that the responsibility for improving the quality of instruction and administration is best achieved through collaboration with the Superintendent.

The School Committee is committed, therefore, to a constructive evaluation of the Superintendent. This formal evaluation should serve the Superintendent as a guide for future change and improvement. It is designed to aid in the further development of the Superintendent's skills and abilities in working with the entire School Community toward the continuous improvement of the Sudbury Public Schools.

All School Committee discussion and deliberation related to the Superintendent's performance evaluation shall be conducted in open session in accordance with the Open Meeting Law.

SOURCE: MASC – Updated 2022

LEGAL REF: M.G.L. 30A:18-25
603CMR35:00

**Sudbury Public Schools
School Committee Meeting**

Date: January 26, 2026

Agenda Item: 4f

Discussion and Potential Vote on the FY27 Budget Book

Recommendation:

Background Information:

At the September 22, 2025 School Committee meeting, the Committee discussed potential enhancements to the FY27 Budget Book and identified areas they would like incorporated. This agenda item will provide an opportunity to review the materials prepared by the administration and to discuss district and School Committee priorities related to the tiered items included in the Budget Book.

Reference Materials:

September 22, 2025 Agenda Packet:

https://resources.finalsite.net/images/v1758552845/sudburyk12maus/p1qxsfe7xdiepcb2ms3h/AMENDEDAgendaPacket_09222025_Agendadocx3.pdf

School Committee FY27 Budget Guidelines (Approved 9/8/2025) :

<https://www.sudbury.k12.ma.us/fs/resource-manager/view/1370ba85-b6c3-4d5b-9318-d9d6f7a78ecc>

Attachments:

FY27 Budget Book_DRAFT

Action: XX **Report:** **Discussion:** XX

Sudbury Public Schools

Budget Book

— v1_0 Superintendent's Recommended FY27 Budget, January 2026



Superintendent's Introduction



Members of the School Committee and Sudbury Community,

I am pleased to present the Superintendent's Recommended Budget for FY27. This budget reflects our continued commitment to maintaining strong educational programs for students while balancing fiscal responsibility within the Town's financial guidance. As outlined in the FY27 Budget Book, the proposal prioritizes contractual obligations, student needs, and transparency around key assumptions, risks, and trade-offs.

In FY27, the district is proud to support key initiatives, including:

- Second-Year Implementation of the English Language Arts (ELA) curriculum for grades K-5, with focus areas for year two turning toward assessments and data.
- Middle School Math Pathways Changes, including the addition of an eighth-grade elective geometry course providing access to algebra.
- Nixon and Haynes Roof Project in which the district has partnered with the Massachusetts School Building Authority (MSBA) to design and implement a new roofing system for the Josiah Haynes Elementary School as well as replace approximately 50% of the General John Nixon Elementary School's roof. The MSBA reimbursement rate is approximately 41% of the cost of the two projects.

Key Cost Drivers for FY27

The primary drivers of the FY27 budget include contractual salary obligations totaling \$1,673,772, enrollment-driven classroom positions of \$241,248, and increased special education contracted services of \$146,451. Additional pressures include \$35,503 in software subscription renewal increases and a 0.5 FTE middle school math teacher to address instructional needs, at a cost of \$41,882.

Maintained Investments from Prior Years

Despite fiscal constraints, the budget sustains several critical commitments: newly negotiated contractual settlements for Units A, B, and C; 2.6 FTEs supporting mental and behavioral health services; continued investment in school support specialists and interventionists across the district; special education contracted services supported in part by available Circuit Breaker capacity; and full-time assistant principals at the elementary level to meet growing student and administrative demands.

Adjustments to Meet Initial Budget Guidance

To align with the Town Manager's recommended 3.75% increase (\$1,772,979), the district made targeted reductions and adjustments. These included reductions in teacher assistant positions and an EL teaching position due to decreased enrollment and student needs, significant reductions in software subscriptions, and the elimination of the SMILE program. In addition, the budget incorporates measured risk through the use of one-time funds, including Circuit Breaker resources and the Building Use Revolving Fund, to manage short-term enrollment and utility pressures.

Revised Guidance and Summer Programming

Recognizing concerns about the elimination of summer programming and the added reliance on one-time funds, the Town Manager increased the guidance to 4.17%, providing an additional \$200,000. This adjustment allows the district to explore supporting a summer program bridge for families in FY27 while maintaining overall budget balance.

In summary, the FY27 budget represents a thoughtful balance between sustaining core educational services, responding to student needs, and operating within the Town's fiscal parameters. I look forward to continued collaboration with the School Committee and the community as we move through the budget process.

Respectfully submitted,
Brad Crozier
Superintendent of Schools

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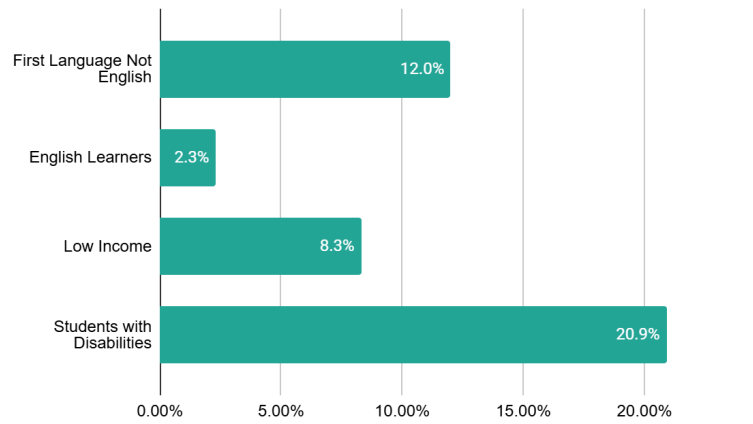
District at-a-Glance 2025-2026

2535 Students

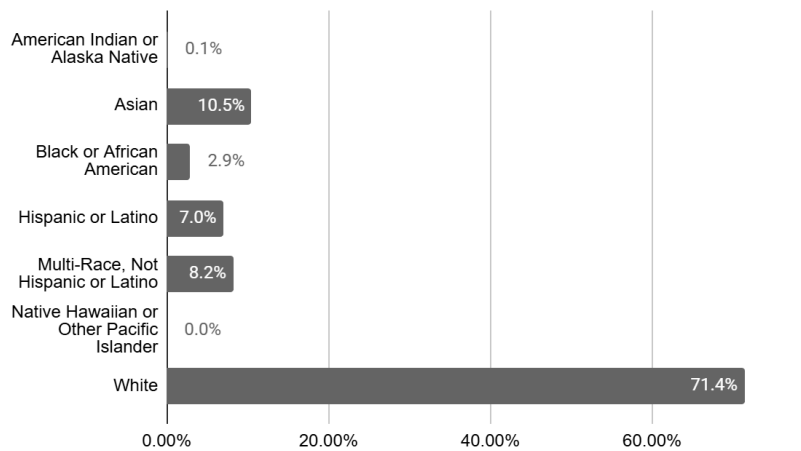


450.6 Staff FTE

Selected Populations



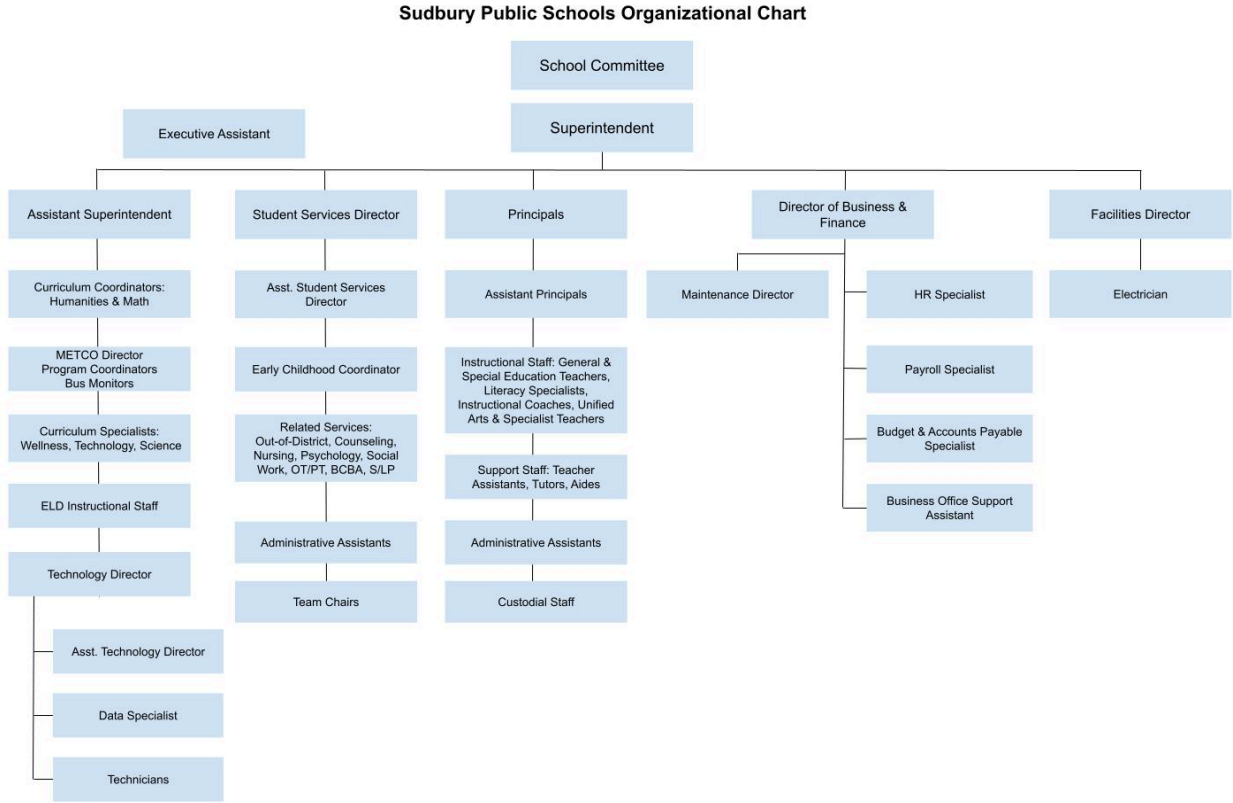
Student Race & Ethnicity



Source: DESE School and District Profiles



SPS 2025-26 Organizational Chart



Sudbury Public School Committee , school-committee@sudbury.k12.ma.us				
Karyn Jones Chairperson	Jessica McCready, PhD Vice Chairperson	Nicole Burnard Member	Betsy Sues Member	Julie Durgin-Sicree Member



Strategic Plan Overview

<p style="text-align: center;"><i>Mission</i></p> <p>The Sudbury Public Schools strive to enable all students to reach their intellectual and personal potential. The school system, in partnership with families and the community, will work with integrity and respect to realize the shared vision of enabling students to become lifelong learners and effective contributors of society.</p>
<p style="text-align: center;"><i>Vision</i></p> <p>We are committed to excellence in educating students to be knowledgeable, creative, independent thinkers who are caring collaborative members of the school and wider communities.</p>
<p style="text-align: center;"><i>Core Values</i></p> <ul style="list-style-type: none">● Enhance the learning and teaching process to enable and inspire students to achieve their potential● Actively promote personal responsibility and integrity● Seek and promote opportunities to advance equity● Cultivate a lifelong commitment to community
<p style="text-align: center;"><i>Equity Statement</i></p> <p>Sudbury Public Schools are committed to welcoming, affirming, and celebrating all students, staff, and families. Sudbury Public Schools are committed to creating and sustaining a culture that promotes advocacy, equity, and justice for marginalized groups who have been systematically oppressed and excluded. Sudbury Public Schools are committed to an anti-bias and anti-racist education that includes and values the perspectives and histories of diverse peoples.</p>
<p style="text-align: center;"><i>Theory of Action</i></p> <p>IF SPS provides:</p> <ul style="list-style-type: none">● Differentiated high quality instruction● Safe school environment● Instructional leadership and ongoing professional development● The use of data to inform instruction <p>THEN:</p> <ul style="list-style-type: none">● Students will be challenged and their varied learning needs met● Capacity of educators will grow● Existing achievement gaps will narrow



Strategic Objectives

Wellness: Sudbury Public Schools promote the social, emotional, behavioral, and physical wellness of students.

Innovation: Sudbury Public Schools implement innovative, research-based curriculum and educational practices.

Meeting the Needs of ALL Students: Sudbury Public Schools provides equitable learning experiences to engage and challenge every student.

Strategic Initiatives

1.a. Strengthen and maintain district wide safety protocols through continuous monitoring to foster safe and supportive schools.

2.a. Implement High Quality Instructional Practices and Materials (HQIM) using rigorous standards to ensure that learning opportunities are motivating, authentic, and develop student agency.

3.a. Develop and expand Multi-tiered Systems of Support (MTSS) that enhance equitable, accessible, inclusive, challenging, and engaging learning experiences for all.

1.b. Enhance educator capacity to include consistent, daily SEL practices to promote a positive climate for learning.

2.b. Develop and implement a structured, inclusive, and evidence-based curriculum review process that ensures academic programs align with current standards and meet the evolving needs of our students.

3.b. Create and support a reflective culture built on a foundation of evidence to promote continuous improvement.

1.c. Examine the *Facilities Conditions Assessment* to plan for and address the infrastructure needs in providing a safe, healthy, learning environment in all SPS school buildings.

2.c. Develop and expand digital literacy opportunities to empower students to thrive academically and navigate the digital world safely and responsibly.

3.c. Review specialized programs, structures and supports to meet the learning and emotional needs of all students.

3.d. Enhance collaboration and accessible communication with the SPS community to foster student success, build partnerships with families, and reduce barriers to inclusion.



Action Steps

1.a. Strengthen and maintain district wide safety protocols through continuous monitoring to foster safe and supportive schools

- 1.a.i. Develop and implement a professional development module to build staff capacity in identifying signs of depression and suicide.
- 1.a.ii. Provide training for staff and instructional sessions for students on *Say Something Anonymous Reporting System*
- 1.a.iii. Communicate the purpose and procedures for reunification to staff and families

2.a. Implement High Quality Instructional Practices and Materials (HQIM) using rigorous standards to ensure that learning opportunities are motivating, authentic, and develop student agency.

- 2.a.i. Implement Expeditionary Learning (EL) grades K-5
- 2.a.ii. Pilot EL in grade 6
- 2.a.iii. Explore ELA implications for 7 and 8
- 2.a.iv. Review and align mathematical course content with HQIM and course progressions and continue to focus on engaging and equitable mathematical experiences for all students
- 2.a.v. Complete the full implementation of Bridges in Mathematics 3rd Edition in all K-5 classrooms
- 2.a.vi. Implement additional grade 7 mathematics course to align with grade level standards and practices
- 2.a.vii. Design supplemental course for 8th grade Geometry standards to offer additional pathway into Algebra
- 2.a.viii. Continue the 3-year implementation of OpenSciEd at middle school
- 2.a.ix. Realign elementary science curriculum by shifting to a phenomenon-based storyline approach, and developing guidance documents to improve alignment in science teaching and learning

3.a. Develop and expand Multi-tiered Systems of Support (MTSS) that enhance equitable, accessible, inclusive, challenging, and engaging learning experiences for all.

- 3.a.i. Continue to develop a shared understanding of MTSS and Universal Design for Learning
- 3.a.ii. Review, revise, and align protocols and entrance and exit criteria for Tiered Support Systems
- 3.a.iii. Engage the early childhood community to understand their needs for equitable access.
- 3.a.iv. Provide professional development regarding the disability awareness curriculum in grades 3-5
- 3.a.v. Continue the district's ADA transition work and normalize use of assistive technologies in large presentation spaces to reach all audiences
- 3.a.vi. Deploy classroom UDL (Universal Design for Learning) instructional technology (Year 2 of 5)



	<ul style="list-style-type: none"> ● 2.a.x. Review and revise the scope and sequence for the middle school Health and Physical Education curricula to align with the new National Health Standards and MA Health Framework, ensuring a skills-based approach. 	
<p>1.b. Enhance educator capacity to include consistent, daily SEL practices to promote a positive climate for learning.</p> <ul style="list-style-type: none"> ● 1.b.i. Model SEL signature practices during professional development sessions and staff meetings ● 1.b.ii. Facilitate professional learning in implementing SEL signature practices 	<p>2.b. Develop and implement a structured, inclusive, and evidence-based curriculum review process that ensures academic programs align with current standards and meet the evolving needs of our students.</p> <ul style="list-style-type: none"> ● 2.b.i. Conduct a comprehensive curriculum review of our World Languages program ● 2.b.ii. Outline a curriculum review timeline for all core content areas 	<p>3.b. Create and support a reflective culture built on a foundation of evidence to promote continuous improvement.</p> <ul style="list-style-type: none"> ● 3.b.i. Provide coaching and collaboration time on using data to analyze and evaluate information through an equity lens to support daily instruction ● 3.b.ii. Expand data warehousing capacity ● 3.b.iii. Utilize the updated DCAP (District Curriculum Accommodation Plan) to inform the Student Support Teams (IST/BBST) processes
<p>1.c. Examine the <i>Facilities Conditions Assessment</i> to plan for and address the infrastructure needs in providing a safe, healthy, learning environment in all SPS school buildings.</p> <ul style="list-style-type: none"> ● 1.c.i. Adjust the SPS Capital Plan as appropriate based on the Facilities Conditions Assessment 	<p>2.c. Develop and expand digital literacy opportunities to empower students to thrive academically and navigate the digital world safely and responsibly.</p> <ul style="list-style-type: none"> ● 2.c.i. Pilot student appropriate AI tools in a managed environment to build AI literacy as a tool for learning in grade 8 ● 2.c.ii. Implement redesigned digital literacy and computer science courses for grades 6-8. 	<p>3.c. Review specialized programs, structures and supports to meet the learning and emotional needs of all students.</p> <ul style="list-style-type: none"> ● 3.c.i. Continue to support staff with the new IEP process ● 3.c.ii. Revise mental health goal writing and practices



		<p>3.d. Enhance collaboration and accessible communication with the SPS community to foster student success, build partnerships with families, and reduce barriers to inclusion.</p> <ul style="list-style-type: none">● 3.d.i. Review our report card and family conference documents for clarity, consistency, and accessibility regarding student academics● 3.d.ii. Gather feedback from families about current communication practices
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Superintendent and School Committee Goals

Superintendent

Student Achievement Goal
<p>Goal: By June of 2026, the superintendent will advance equitable, standards-based instruction for all students through implementation of high-quality curriculum and inclusive instructional practices.</p> <p>Key Activities:</p> <ul style="list-style-type: none">● Implement EL Education curriculum for grades K–5 and pilot in grade 6● Realign elementary science curriculum by shifting to a phenomenon-based approach and developing guidance documents● Implement additional grade 7 mathematics course to align with grade level standards and practices● Design supplemental course for 8th grade Geometry standards to offer additional pathway into Algebra● Continue OpenSciEd rollout at middle school● Implement redesigned digital literacy and computer science courses for grades 6-8● Review and revise the scope and sequence for the middle school Health and Physical Education curricula to align with the new National Health Standards and MA Health Framework <p>Evidence of Success:</p> <ul style="list-style-type: none">● Curriculum implementation plans and materials● Observation and walkthrough data showing use of HQIM and inclusive strategies● Teacher feedback from professional development
District Improvement Goal
<p>Goal: By June of 2026, the superintendent will strengthen multi-tiered systems of support (MTSS) to ensure all students receive equitable and effective academic, behavioral, and social-emotional supports.</p> <p>Key Activities:</p> <ul style="list-style-type: none">● Continue to develop shared understanding of MTSS and UDL across schools● Align and revise Tiered Support System entry/exit criteria● Expand internal data warehousing capacity and train staff on using data to better analyze and evaluate student learning● Review specialized program structures and supports● Enhance practices with the new IEP process and early childhood special education mandates● Continue implementation of Say Something Anonymous Reporting System



Evidence of Success:

- MTSS framework document and staff training records
- Updated protocols and support documentation
- Increased consistency in Student Support Team and BBST processes
- Focused data analysis usage in school-based planning
- Qualitative measures on staff use of data to improve student learning

Professional Practice Goal

Goal: By June 2026, the superintendent will participate in targeted professional development to strengthen leadership skills in navigating political complexity and fostering trust, in order to advance the district's commitment to all students' success.

Key Action Steps:

- Participate in statewide and national leadership workshops focused on strategic communication, governance, and leadership
- Engage in coaching or peer consultation with other superintendents to reflect on leadership challenges and share effective practices
- Collaborate with the School Committee to align messaging and increase public understanding of district priorities

Evidence of Success:

- Documentation of professional development sessions attended, including agendas or certificates
- Summary of engagement in coaching or peer networks, with takeaways and applied strategies
- Documented changes in leadership practice informed by PD (e.g., memos, revised procedures, meeting protocols)



School Committee

Family and Community Engagement

To foster trust, transparency, and collaboration, the Sudbury School Committee will strengthen relationships with families, educators, and the broader community through inclusive engagement practices, open communication, and responsive action.

Actions:

- Review and update policies to support hybrid meetings and inclusive public participation
- Strengthen and support the School Committee's Parent Advisory Council(s).
- Conduct a minimum of two community listening sessions

Teaching, Learning, and Technology

The Sudbury School Committee will support, evaluate, and monitor the implementation of curriculum and classroom technology by receiving presentations from district leaders on instructional practices, reviewing student outcome data, and updating relevant policies, including guidance on class size and technology use. This work will ensure alignment between educational programming, district priorities, and student needs.

Action Steps:

- Monitor implementation of the K–5 EL curriculum
- Evaluate EL Grade 6 pilot and determine next steps
- Review 7th-grade math and the compacted 7/8 pathway
- Review and evaluate the integration of digital resources and instructional technology in classroom instruction.
- Monitor the implementation of Policy JICJ – Student Use of Technology in Schools.

Fiscal Stewardship and Long-Term Planning

Ensure the long-term fiscal health of the Sudbury Public Schools by strengthening the School Committee's ability to align the operating and capital budgets with instructional priorities, equity goals, and the long-term maintenance and capacity needs of district facilities.

Action Steps:

- Prioritize and plan for the district's short- and long-term capital needs by using the Facilities Condition Assessment, Noyes, Nixon, Haynes, and Loring Schools Space Utilization Study, and other usage data.

After-School Care & Enrichment

Identify and advance opportunities to expand after-school care and enrichment programs for SPS students by assessing space, reviewing peer models, engaging stakeholders, and developing actionable strategies.

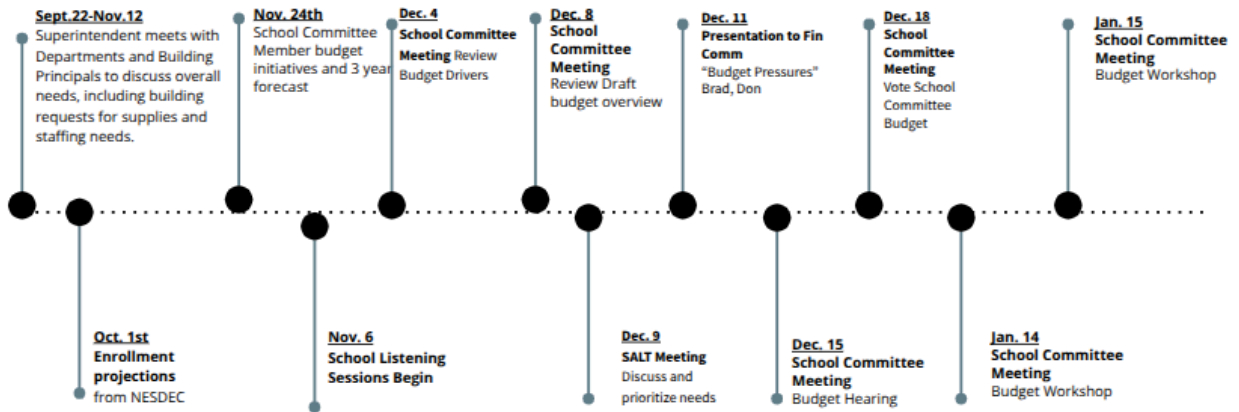
Action Steps:

- Explore and evaluate options for after-school care and enrichment through research, stakeholder engagement, and analysis of district capacity, peer models, and the diverse needs of SPS students.



Budget Timeline

SPS School Committee FY27 Budget Timeline

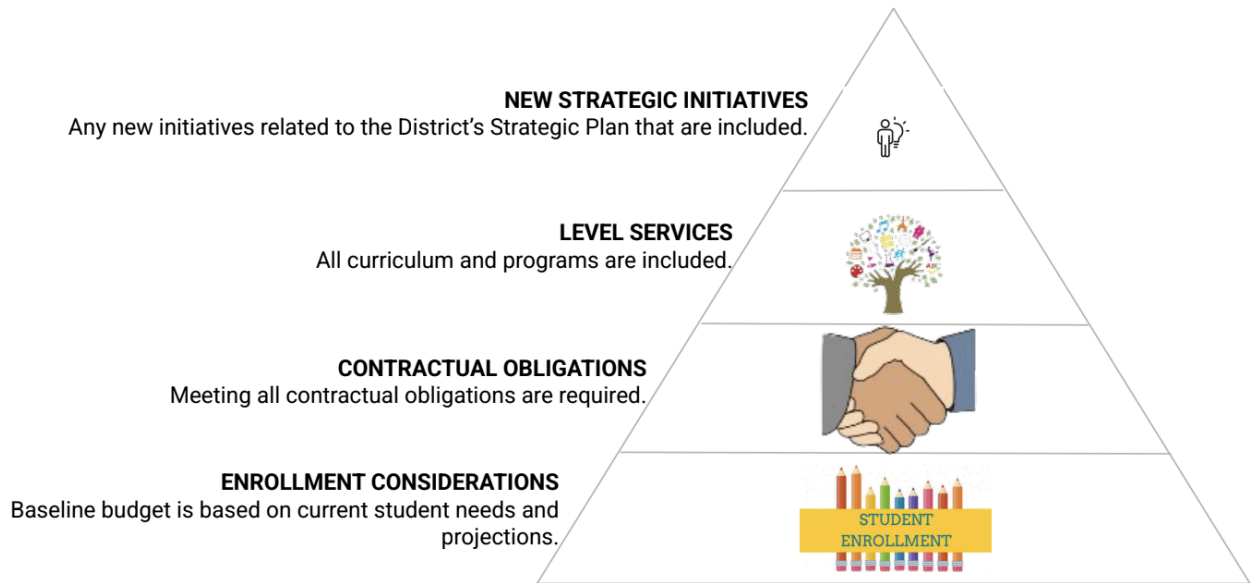


Additional Operating Budget Meetings
February: Fin Com Budget Hearing
May 4: Annual Town Meeting



Budget Overview

The FY27 Budget was built first on enrollment projections, after which all contractual obligations and level services for students were considered. The final step was to analyze the feasibility of desired new initiatives. After careful contemplation and analysis, supports for students' needs were incorporated into the FY27 budget.



Enrollment

Historical Enrollment By Grade

Historical Enrollment in Grade Combinations										
School Year	PK-5	K-5	K-2	3-5	6-8	K-8	PK-8	7-8		
2015-16	1831	1770	825	945	991	2761	2822	655		
2016-17	1833	1758	810	948	977	2735	2810	672		
2017-18	1758	1709	802	907	942	2651	2700	633		
2018-19	1711	1663	773	890	943	2606	2654	608		
2019-20	1728	1684	807	877	947	2631	2675	651		
2020-21	1626	1585	749	836	912	2497	2538	633		
2021-22	1655	1589	778	811	871	2460	2526	581		
2022-23	1705	1632	780	852	850	2482	2555	578		
2023-24	1725	1650	821	829	831	2481	2556	558		
2024-25	1735	1660	810	850	820	2480	2555	543		
2025-26	1681	1607	785	822	865	2472	2546	550		

Historical Percentage Changes			
School Year	K-8	Diff.	%
2015-16	2761		
2016-17	2735	-26	-0.9%
2017-18	2651	-84	-3.1%
2018-19	2606	-45	-1.7%
2019-20	2631	25	1.0%
2020-21	2497	-134	-5.1%
2021-22	2460	-37	-1.5%
2022-23	2482	22	0.9%
2023-24	2481	-1	0.0%
2024-25	2480	-1	0.0%
2025-26	2472	-8	-0.3%
Change		-289	-10.5%

Source: SPS Enrollment Records; NESDEC (New England School Development Council) October, 2025



Enrollment Projection

Over the next five years, NESDEC projects that Sudbury will see an increase in Pre-Kindergarten to grade 8 enrollment of approximately 170 students.

Enrollment Projections By Grade*																				
Birth Year	Births*		School Year	PK	K	1	2	3	4	5	6	7	8						K-8	PK-8
2020	137		2025-26	74	259	254	272	299	278	245	315	278	272						2472	2546
2021	168		2026-27	74	312	267	261	278	300	279	246	315	276						2534	2608
2022	162		2027-28	74	301	321	274	266	279	301	280	246	313						2581	2655
2023	141	(prov.)	2028-29	74	262	310	330	280	267	280	302	280	244						2555	2629
2024	149	(prov.)	2029-30	75	277	270	318	337	281	268	281	302	278						2612	2687
2025	151	(est.)	2030-31	75	282	285	277	324	338	282	269	281	300						2638	2713
2026	154	(est.)	2031-32	75	287	290	293	283	325	339	283	269	279						2648	2723
2027	152	(est.)	2032-33	76	282	296	298	299	284	326	340	283	267						2675	2751
2028	149	(est.)	2033-34	76	278	290	304	304	300	285	327	340	281						2709	2785
2029	151	(est.)	2034-35	76	281	286	298	310	305	301	286	327	338						2732	2808
2030	152	(est.)	2035-36	76	282	289	294	304	311	306	302	286	325						2699	2775

Note: Ungraded students (UNGR) often are high school students whose anticipated years of graduation are unknown, or students with special needs - UNGR not included in Grade Combinations for 7-12, 9-12, etc.

 Based on an estimate of births

 Based on children already born

 Based on students already enrolled

*Birth data provided by Public Health Vital Records Departments in each state.

** < 10 Not reported, to protect subgroups with fewer than 10 students.



Source: SPS Enrollment Records; NESDEC (New England School Development Council) October, 2025



Class Size Projections

Loring	K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Total
Enrollment, 2025-2026	73	76	64	82	78	57	430
Sections	4	4	3	4	4	3	22
Class Size	18.3	19.0	21.3	20.5	19.5	19.0	19.5
Projected Enrollment, 2026-2027	70	73	76	64	82	78	443
Sections	4	4	4	3	4	4	23
Class Size	17.5	18.3	19.0	21.3	20.5	19.5	19.3
+/- Sections	0	0	1	-1	0	1	1
NESDEC, 2026-2027	85	75	78	66	82	78	464

Nixon	K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Total
Enrollment, 2025-2026	56	55	56	59	61	48	335
Sections	3	3	3	3	3	2	17
Class Size	18.7	18.3	18.7	19.7	20.3	24.0	19.7
Projected Enrollment, 2026-2027	54	56	55	56	59	61	341
Sections	3	3	3	3	3	3	18
Class Size	18.0	18.7	18.3	18.7	19.7	20.3	18.9
+/- Sections	0	0	0	0	0	1	1
NESDEC, 2026-2027	67	58	56	57	59	61	358



Haynes	K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Total
Enrollment, 2025-2026	56	52	80	65	71	51	375
Sections	3	3	4	3	3	3	19
Class Size	18.7	17.3	20.0	21.7	23.7	17.0	19.7
Projected Enrollment, 2026-2027	52	56	52	80	65	71	376
Sections	4	3	3	4	3	3	20
Class Size	13.0	18.7	17.3	20.0	21.7	23.7	18.8
+/- Sections	1	0	-1	1	0	0	1
NESDEC, 2026-2027	75	58	54	81	65	71	404

Noyes	K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Total
Enrollment, 2025-2026	74	71	72	93	68	89	467
Sections	4	4	3	4	3	4	22
Class Size	18.5	17.8	24.0	23.3	22.7	22.3	21.2
Projected Enrollment, 2026-2027	73	74	69	72	93	68	449
Sections	4	4	4	3	4	3	22
Class Size	18.3	18.5	17.3	24.0	23.3	22.7	20.4
+/- Sections	0	0	1	-1	1	-1	0
NESDEC, 2026-2027	85	76	73	74	93	68	469



District, K-5	K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Total
Enrollment, 2025-2026	259	254	272	299	278	245	1607
Sections	14	14	13	14	13	12	80
Class Size	18.5	18.1	20.9	21.4	21.4	20.4	20.1
Projected Enrollment, 2026-2027	249	259	252	272	299	278	1609
Sections	15	14	14	13	14	13	83
Class Size	16.6	18.5	18.0	20.9	21.4	21.4	19.4
+/- Sections	1	0	1	-1	1	1	3
NESDEC, 2026-2027	312	267	261	278	299	278	1695

Curtis	Grade 6	Grade 7	Grade 8	Total
Enrollment, 2025-2026	315	278	272	865
Sections	14	12	14	40
Class Size	22.5	23.2	19.4	21.6
Projected Enrollment, 2026-2027	245	315	278	838
Sections	12	14	14	40
Class Size	20.4	22.5	19.9	21.0
+/- Sections	-2	2	0	0
NESDEC, 2026-2027	246	315	276	837



District	K-8
Enrollment, 2025-2026	2491
Projected Enrollment, 2026-2027	2447
+/- Students	-44
NESDEC, 2026-2027	2532

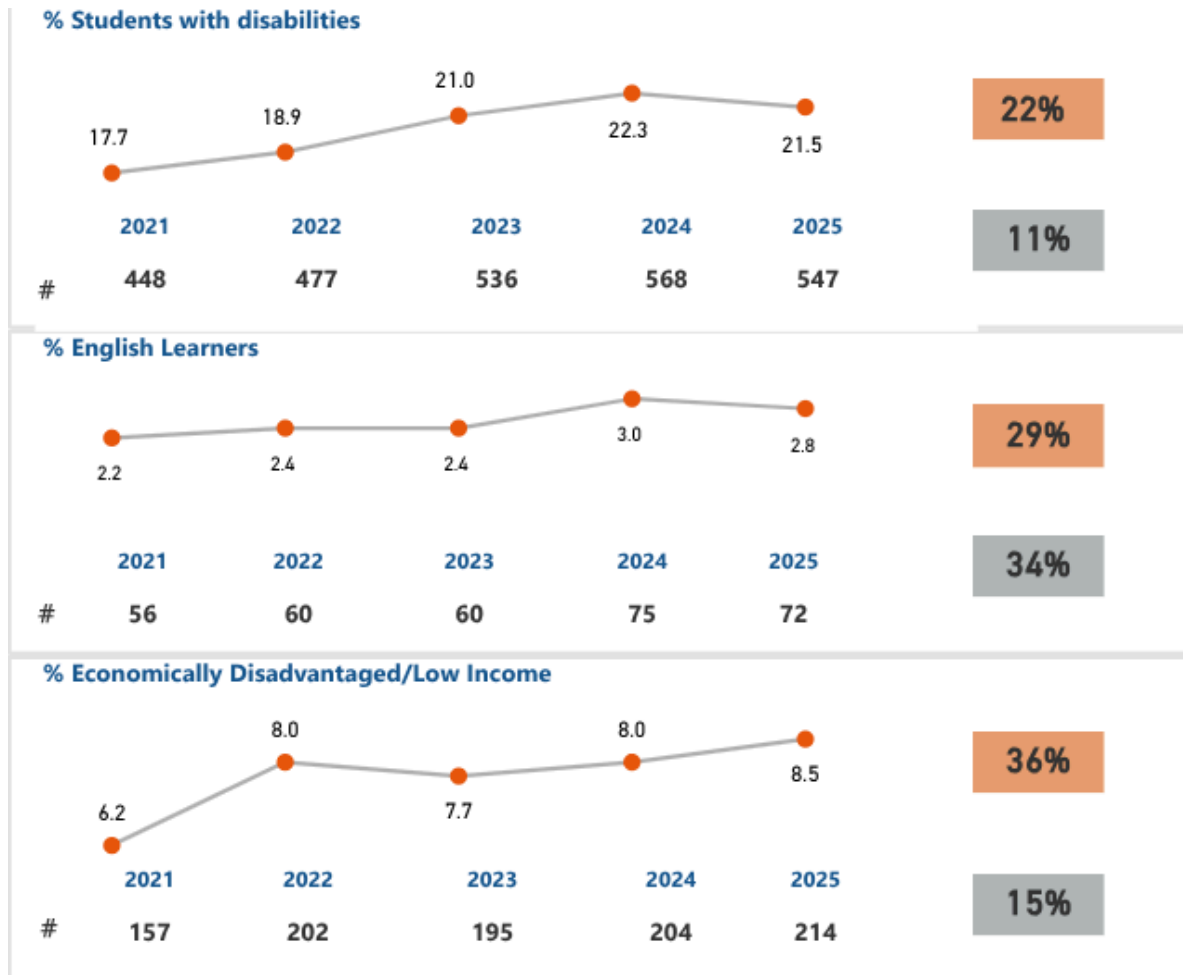


Source: SPS Enrollment Records; NESDEC (New England School Development Council) October, 2025



Overall and Special Populations

Five-year enrollment trends indicate the overall enrollment trends in the special populations of Students with disabilities, English Learners, and Economically Disadvantaged.



 District Change Over 5 Years

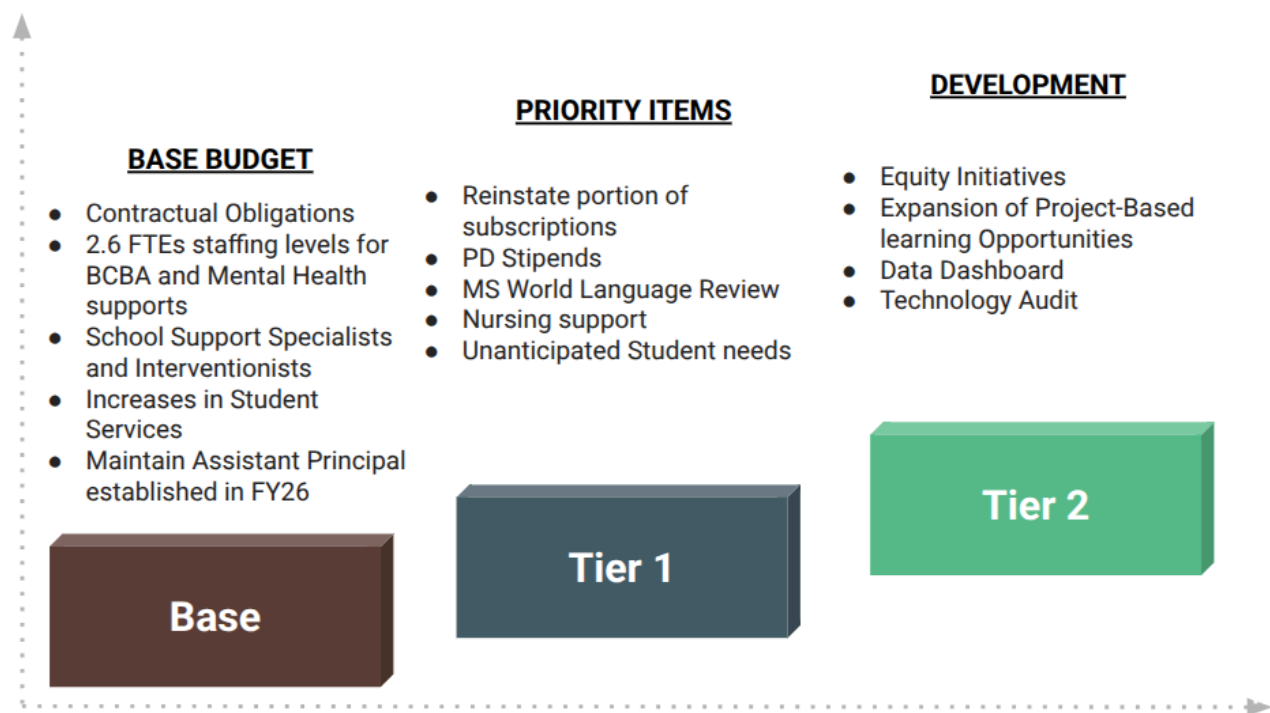
 State Change Over 5 Years

Source: DESE (Department of Elementary and Secondary Education) RADAR (Resource Allocation and District Allocation Reports)



Budget Tiers

The scenarios below document the base budget/level details vs. the expenses the district would be assuming with new initiatives. The numbers as presented in the Tier 1 budget help inform what the new budget can include and what trade-offs need to be made.



Base Budget Detail

Contractual Obligations	Newly negotiated contractual settlement for Units A, B and C
Mental and Behavioral Health Positions	2.6 FTEs staffing levels for BCBA and Mental Health Supports
School Support Specialists and Interventionists	MS Health and Wellness staffing, School Support Specialist & Tutors, MS Executive Functioning Teacher, Grade 8 Number Theory, Grade 7 Math Enrichment
Special Education Contracted Services	Student Services increases will be funded from Circuit Breaker funding, as FY27 has more capacity than typical
Assistant Principal	Increases in student needs and administrative duties continue to necessitate full-time Assistant Principals at the elementary schools



Budget Drivers

Salary Expenses (Contractual Obligations)	\$1,673,772
Enrollment-Driven Classroom Positions	\$241,248
Special Education Contracted Services	\$146,451
Software Subscriptions	\$35,503
Middle School Math (.5 FTE)	\$41,882

Tier I Budget Initiatives

Item	Cost	Ongoing/ One-time	Description
Reinstate Portion of Subscriptions	\$25,000	Ongoing	Reduce the number of cuts to online subscriptions
PD Stipends	\$120,000	Ongoing	Stipends to support teacher leadership in the areas of professional development and curriculum implementation in content areas without current leads
MS World Language Review	\$20,000	One Time	Contract for curriculum program review
Nursing Support	\$77,000	Ongoing	A nursing position to support full-time coverage
Unanticipated Student Needs	TBD	Ongoing	Review caseloads and service delivery needs to ensure student needs are met



FY27 Budget by DESE Function Code

<u>EXPENSE (DOE Function Category)</u>	FY2026			FY2027		
	<u>Budget \$</u>	<u>+/- \$:</u>	<u>+/- %</u>	<u>Budget \$</u>	<u>+/- \$:</u>	<u>+/- %</u>
Administration	\$ 1,351,639	\$ 33,435	2.54%	\$ 1,396,070	\$ 44,431	3.29%
Instructional Leadership	\$ 4,209,659	\$ 356,696	9.26%	\$ 4,438,357	\$ 228,698	5.43%
Teachers	\$ 23,789,565	\$ 677,332	2.93%	\$ 24,772,363	\$ 982,798	4.13%
Other Teaching Services	\$ 6,241,266	\$ 175,339	2.89%	\$ 6,731,474	\$ 490,208	7.85%
Professional Development	\$ 345,712	\$ 417	0.12%	\$ 340,939	\$ (4,773)	-1.38%
Instructional Materials/Equip/Tech	\$ 746,264	\$ 5,781	0.78%	\$ 749,243	\$ 2,979	0.40%
Guidance, Counseling, Testing	\$ 2,104,002	\$ (10,020)	-0.47%	\$ 2,200,344	\$ 96,342	4.58%
Pupil Services	\$ 3,759,374	\$ 119,027	3.27%	\$ 3,828,863	\$ 69,489	1.85%
Operations and Maintenance	\$ 3,126,452	\$ 55,831	1.82%	\$ 3,188,352	\$ 61,900	1.98%
Fixed Charges	\$ 212,667	\$ 898	0.42%	\$ 213,574	\$ 907	0.43%
Out-of-District Expenditures	\$ 1,392,847	\$ 78,840	6.00%	\$ 1,392,847	\$ -	0.00%
TOTAL GF FORECAST \$:	\$ 47,279,447	\$ 1,493,576	3.26%	\$ 49,252,426	\$ 1,972,979	4.17%

Town Manager FY27 Budget Guidance Target (1/16/26):	\$49,252,426	\$	1,972,979	4.17%
	+ / - diff \$:		\$	-

3-Year Budget Forecast by DESE Function Code

<u>EXPENSE (DOE Function Category)</u>	FY2027			FY2028			FY2029		
	<u>Budget \$</u>	<u>+/- \$:</u>	<u>+/- %</u>	<u>Budget \$</u>	<u>+/- \$:</u>	<u>+/- %</u>	<u>Budget \$</u>	<u>+/- \$:</u>	<u>+/- %</u>
Administration	\$ 1,396,070	\$ 44,431	3.29%	\$ 1,431,512	\$ 35,442	2.54%	\$ 1,470,063	\$ 38,551	2.69%
Instructional Leadership	\$ 4,438,357	\$ 228,698	5.43%	\$ 4,583,844	\$ 145,487	3.28%	\$ 4,561,852	\$ (21,992)	-0.48%
Teachers	\$ 24,772,363	\$ 982,798	4.13%	\$ 25,882,870	\$ 1,110,507	4.48%	\$ 27,038,390	\$ 1,155,520	4.46%
Other Teaching Services	\$ 6,731,474	\$ 490,208	7.85%	\$ 7,010,385	\$ 278,912	4.14%	\$ 7,276,097	\$ 265,711	3.79%
Professional Development	\$ 340,939	\$ (4,773)	-1.38%	\$ 342,647	\$ 1,708	0.50%	\$ 346,073	\$ 3,426	1.00%
Instructional Materials/Equip/Tech	\$ 749,243	\$ 2,979	0.40%	\$ 756,734	\$ 7,491	1.00%	\$ 764,302	\$ 7,568	1.00%
Guidance, Counseling, Testing	\$ 2,200,344	\$ 96,342	4.58%	\$ 2,288,380	\$ 88,036	4.00%	\$ 2,361,815	\$ 73,435	3.21%
Pupil Services	\$ 3,828,863	\$ 69,489	1.85%	\$ 4,162,295	\$ 333,432	8.71%	\$ 4,371,326	\$ 209,031	5.02%
Operations and Maintenance	\$ 3,188,352	\$ 61,900	1.98%	\$ 3,311,997	\$ 123,645	3.88%	\$ 3,379,337	\$ 67,340	2.03%
Fixed Charges	\$ 213,574	\$ 907	0.43%	\$ 214,490	\$ 916	0.43%	\$ 216,635	\$ 2,145	1.00%
Out-of-District Expenditures	\$ 1,392,847	\$ -	0.00%	\$ 1,476,418	\$ 83,571	6.00%	\$ 1,565,003	\$ 88,585	6.00%
TOTAL GF FORECAST \$:	\$ 49,252,426	\$ 1,972,979	4.17%	\$ 51,461,573	\$ 2,209,147	4.49%	\$ 53,350,893	\$ 1,889,320	3.67%

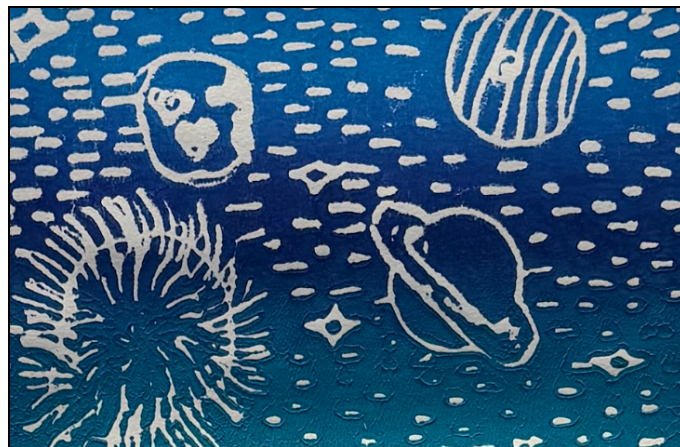


FY27 Budget by DESE Object Code

OBJ# MUNIS Account Summary Name:	FY2026	FY2027	vs. FY2026	
	Budget \$	Budget \$	+ / - \$	+ / - %
502 ART	\$ 428,046	\$ 451,261	\$ 23,215	5.42%
505 AUDIO VISUAL	\$ 52,285	\$ 52,808	\$ 523	1.00%
513 COMPUTER INSTRUCTION	\$ 342,448	\$ 354,471	\$ 12,023	3.51%
514 CURRICULUM DEVELOPMENT	\$ 947,474	\$ 982,395	\$ 34,921	3.69%
516 ELEMENTARY EDUCATION	\$ 8,241,401	\$ 8,579,335	\$ 337,934	4.10%
520 EARLY CHILDHOOD EDUCATION	\$ 134,128	\$ 140,100	\$ 5,972	4.45%
521 ENGLISH	\$ 790,652	\$ 837,999	\$ 47,347	5.99%
522 ENGLISH AS SECOND LANGUAGE	\$ 491,969	\$ 450,024	\$ (41,945)	-8.53%
524 FOREIGN LANGUAGE	\$ 859,302	\$ 890,725	\$ 31,423	3.66%
530 GUIDANCE	\$ 1,114,526	\$ 1,151,715	\$ 37,189	3.34%
531 HEALTH EDUCATION	\$ 246,725	\$ 255,376	\$ 8,651	3.51%
536 INSTRUCTION	\$ 116,146	\$ 117,308	\$ 1,162	1.00%
540 TECH ED (Technology/Engineering/Robotics)	\$ 268,446	\$ 277,928	\$ 9,482	3.53%
541 KINDERGARTEN	\$ 1,699,417	\$ 1,798,378	\$ 98,961	5.82%
544 LIBRARY	\$ 518,399	\$ 551,369	\$ 32,970	6.36%
555 MATHEMATICS	\$ 1,505,409	\$ 1,627,251	\$ 121,842	8.09%
560 MEDIA - COMPUTER SERVICES	\$ 338,346	\$ 374,137	\$ 35,791	10.58%
561 MIDDLE SCHOOL PROGRAMS	\$ 27,650	\$ 27,927	\$ 277	1.00%
563 MUSIC	\$ 637,374	\$ 621,696	\$ (15,678)	-2.46%
570 PHYSICAL EDUCATION	\$ 659,075	\$ 687,082	\$ 28,007	4.25%
572 PRE-SCHOOL EDUCATION	\$ 494,048	\$ 516,621	\$ 22,573	4.57%
573 PROFESSIONAL DEVELOPMENT	\$ 270,966	\$ 265,445	\$ (5,521)	-2.04%
575 READING	\$ 1,013,455	\$ 1,046,083	\$ 32,628	3.22%
582 SCIENCE	\$ 685,038	\$ 719,529	\$ 34,491	5.03%
583 SOCIAL STUDIES	\$ 800,625	\$ 836,788	\$ 36,163	4.52%
584 SPECIAL EDUCATION	\$ 9,739,451	\$ 10,318,877	\$ 579,426	5.95%
591 SPEECH	\$ 904,799	\$ 953,297	\$ 48,498	5.36%



OBJ# MUNIS Account Summary Name:	FY2026	FY2027	vs. FY2026	
	Budget \$	Budget \$	+ / - \$	+ / - %
594 SUBSTITUTES	\$ 533,081	\$ 676,269	\$ 143,188	26.86%
532 HEALTH SERVICES	\$ 544,457	\$ 555,000	\$ 10,543	1.94%
534 HOME STUDY	\$ 87,576	\$ 100,000	\$ 12,424	14.19%
564 OCCUPATIONAL THERAPY	\$ 475,967	\$ 487,323	\$ 11,356	2.39%
571 PHYSICAL THERAPY	\$ 112,426	\$ 115,751	\$ 3,325	2.96%
574 PSYCHOLOGICAL SERVICES	\$ 961,973	\$ 1,017,968	\$ 55,995	5.82%
585 EQUIPMENT (LEASE & REPLACEMENT)	\$ 90,667	\$ 91,574	\$ 907	1.00%
590 SPED CONSULTANTS	\$ 72,175	\$ 133,000	\$ 60,825	84.27%
596 TUITION (SPED OOD)	\$ 1,392,847	\$ 1,392,847	\$ -	0.00%
605 VISION CONSULTANT	\$ 122,956	\$ 68,594	\$ (54,362)	-44.21%
602 TRANSPORTATION (REGULAR)	\$ 1,211,944	\$ 1,211,944	\$ -	0.00%
603 TRANSPORTATION (SPED)	\$ 882,436	\$ 882,698	\$ 262	0.03%
610 CURRICULUM/LIBRARY/MEDIA	\$ 408,454	\$ 412,538	\$ 4,084	1.00%
515 CUSTODIAL SERVICES	\$ 1,104,318	\$ 1,144,629	\$ 40,311	3.65%
546 MAINTENANCE	\$ 853,102	\$ 869,874	\$ 16,772	1.97%
581 SAFETY PROGRAMS	\$ 57,000	\$ 57,000	\$ -	0.00%
593 SUPERINTENDENT'S OFFICE	\$ -	\$ -	\$ -	0.00%
501 ADMINISTRATION	\$ 3,660,819	\$ 3,764,259	\$ 103,440	2.83%
543 LEGAL SERVICES	\$ 76,687	\$ 77,454	\$ 767	1.00%
615 WATER	\$ 12,591	\$ 12,717	\$ 126	1.00%
616 ELECTRICITY	\$ 687,299	\$ 687,299	\$ -	0.00%
617 HEATING OIL/GAS	\$ 417,201	\$ 421,373	\$ 4,172	1.00%
619 TELEPHONE	\$ 51,941	\$ 52,460	\$ 519	1.00%
621 STIPENDS	\$ 68,930	\$ 68,930	\$ -	0.00%
622 403(b) MATCH	\$ 65,000	\$ 65,000	\$ -	0.00%
	\$ 47,279,447	\$ 49,252,426	\$ 1,972,979	4.17%

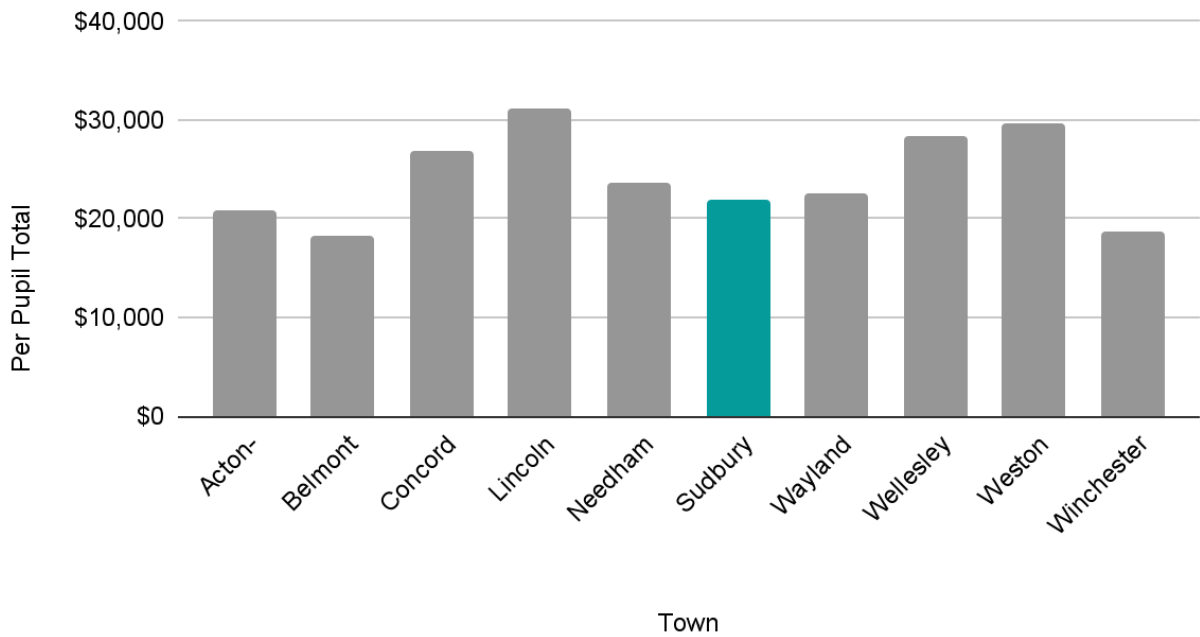


Pupil Expenditure

Per Pupil Expenditure by Comparables

Sudbury's per-pupil cost was \$21,982.87, which is the fourth lowest as compared to peer districts as identified by Sudbury Public Schools School Committee. Note that Lexington's data is missing from the RADAR data set for this period.

Per Pupil Expenditure by Town



Per Pupil Spending by Dollars and Percentage of Total

Sudbury is the fourth-lowest district in terms of per-pupil spending compared to peers. Note that Lexington's data is missing from the RADAR data set for this period.

District Name	Per Pupil Total	Admin	Lead	Teach	Prof Dev	Support	Clinic	Pupil Serv	Maint	Benefits
Lincoln	\$31,135.70	6%	10%	35%	11%	1%	4%	3%	9%	13%
Weston	\$29,760.92	3%	5%	36%	7%	1%	4%	5%	10%	19%
Wellesley	\$28,402.05	3%	9%	37%	11%	3%	4%	4%	8%	14%
Concord	\$26,925.34	2%	8%	40%	15%	1%	3%	3%	8%	12%
Needham	\$23,670.79	4%	8%	35%	9%	2%	4%	3%	8%	19%
Wayland	\$22,634.47	4%	8%	45%	9%	1%	2%	4%	9%	13%
Sudbury	\$21,982.87	2%	9%	41%	12%	1%	3%	4%	7%	15%
Acton-Boxborough	\$20,952.47	2%	6%	37%	10%	1%	1%	4%	13%	18%
Winchester	\$18,725.77	4%	8%	44%	8%	1%	3%	4%	9%	14%
Belmont	\$18,279.99	3%	6%	41%	8%	1%	2%	4%	8%	16%

Functions included in categories

Administration

- 1110 School Committee
- 1210 Superintendent
- 1220 Assistant Superintendents
- 1230 Other District-Wide Administration
- 1410 Business and Finance
- 1420 Human Resources
- 1430 Legal Service for School Committee
- 1435 Legal Settlements
- 1450 District-wide Information Systems

Instructional Leadership

- 2110 Curriculum Directors (Supervisory)
- 2120 Dept Heads (Non-Supervisory)
- 2210 School Leadership
- 2220 Curriculum Leaders (School Level)
- 2250 Admin. Technology (School Level)
- 2315 Instructional Coordinators

Teachers

- 2305 Teachers, Classroom
 - 2310 Teachers, Specialists
- #### Other Teaching Services
- 2320 Medical/ Therapeutic Services
 - 2325 Substitute Teachers
 - 2330 Paraprofessionals
 - 2340 Librarians/Media Center Directors

Professional Development

- 2351 Professional Development Leaders
- 2353 Professional Days
- 2355 Substitutes for Prof. Development
- 2357 Professional Development Costs

Instructional Materials/Equip/Tech

- 2410 Textbooks, Software/Media/Matis
- 2415 Instructional Matis (Libraries)
- 2420 Instructional Equipment
- 2430 General Classroom Supplies
- 2440 Other Instructional Services

Classroom Technology

- 2451 Classroom Technology
- 2453 Technology (Libraries)
- 2455 Instructional Software

Guidance, Counseling, Testing

- 2710 Guidance/Adjustment Counselors
- 2720 Testing and Assessment
- 2800 Psychological Services

Pupil Services

- 3100 Attendance and Parent Liaisons
- 3200 Medical/Health Services
- 3300 Transportation Services
- 3400 Food Services
- 3510 Athletics
- 3520 Other Student Activities
- 3600 School Security

Operations and Maintenance

- 4110 Custodial Services
- 4120 Heating of Buildings
- 4130 Utility Services
- 4210 Maintenance of Grounds
- 4220 Maintenance of Buildings
- 4225 Building Security System
- 4230 Maintenance of Equipment
- 4300 Extraordinary Maintenance
- 4400 Networking/Telecommunications
- 4450 Technology Maintenance

Benefits and fixed charges

- 5100 Employer Retirement Contributions
- 5150 Employee Separation Costs
- 5200 Insurance for Active Employees
- 5250 Insurance for Retired Employees
- 5260 Other Non-Employee Insurance
- 5300 Rental Lease of Equipment
- 5350 Rental Lease of Buildings
- 5400 Short Term Interest RANs
- 5500 Other Fixed/Crossing Guards
- 5550 School Crossing Guards

Source: DESE (Department of Elementary and Secondary Education) RADAR (Resource Allocation and District Allocation Reports)



Staffing Levels

The following tables focus on staffing levels in the Sudbury Public Schools as compared to School Committee identified comparables. Also noted are state staffing levels.

District Name	Teachers	Paraprofessional	Leadership	Student Support	Clerical	Tech
Acton-Boxborough	392.7	155.1	47.6	37.4	40.5	10.6
Belmont	309.4	96.5	32.6	30.6	27.9	9.0
Concord	184.7	117.1	22.2	15.5	16.3	7.4
Lexington	650.0	214.3	70.3	72.4	109.9	14.6
Lincoln	119.0	53.6	14.0	10.2	17.0	4.0
Needham	454.4	200.8	64.0	40.2	69.1	14.0
Sudbury	232.4	60.1	28.1	19.8	18.3	4.0
Wayland	239.3	100.7	35.3	19.7	28.3	4.6
Wellesley	380.5	176.1	49.2	44.6	47.7	15.0
Weston	170.2	79.7	24.9	25.7	24.1	6.0
Winchester	347.2	118.6	33.5	29.7	28.5	3.0

FTE Per 100 Students

District Name	Teachers	Paraprofessional	Leadership	Student Support	Clerical	Tech
Acton-Boxborough	7.7	3.1	1.0	0.7	0.8	0.2
Belmont	7.0	2.1	0.7	0.7	0.6	0.2
Concord	9.6	6.2	1.2	1.0	0.9	0.4
Lexington	9.7	3.2	1.1	1.0	1.6	0.2
Lincoln	11.51	5.2	1.3	1.0	1.6	0.4
Needham	8.3	3.7	1.1	0.7	1.3	0.3
State	8.3	2.8	1.2	0.8	1.0	0.2
Sudbury	9.2	2.4	1.1	0.7	0.7	0.2
Wayland	8.8	3.7	1.3	0.6	1.0	0.2
Wellesley	9.5	4.4	1.2	1.1	1.2	0.4
Weston	8.2	3.9	1.2	1.2	1.2	0.3
Winchester	7.9	2.7	0.7	0.6	0.6	0.1

Source: DESE (Department of Elementary and Secondary Education) RADAR (Resource Allocation and District Allocation Reports)



Total FY27 District Funding



This graphic depicts the anticipated financial flows for the Sudbury Public Schools during FY27. On the left, are expected revenue streams, the largest of which is the Municipal Contribution, which includes not only the Annual Town Meeting appropriation but also funds within the Town Budget for healthcare benefits for active and retired employees. Estimated expenditures organized by DESE function codes, with the greatest sum being allocated to instructional services, are found on the right.



All Funds Summary

Fund Type	FY26 Actual	FY27 Projected	One Time?	Primary Use
Operating (Town Appropriation)	\$47,758,178	\$50,277,399	Recurring	School District Operations
Town (Employee Benefits)	\$10,335,980	\$11,515,746	Recurring	Active / Retiree Health Insurance, Workers Comp, Ins. Unemployment Ins. Retirement Contribution Property/Liability Ins.
Grants (Title, IDEA, etc.)	\$1,315,799	\$1,321,585	Recurring	Special Education ESL, Early Education
Circuit Breaker	\$965,366	\$1,292,492	Recurring	Special Education Reimbursement
Revolving (Fees, etc.)	\$1,225,624	\$1,429,838	Recurring	Fee-Based Programs
Other	-	-	-	-

State & Federal Grant Funding

	Federal Grants					State Grant
	305 Title I	140 Title IIA	309 Title IV	240 IDEA	262 Early Child	METCO
Administrative Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 115,830
Instructional/Professional Staff	\$ 68,054	\$ 31,487	\$ 10,000	\$ -	\$ -	\$ -
Support Staff	\$ -	\$ -	\$ -	\$ 630,096	\$ 15,400	\$ 157,511
Benefits (MTRS)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Stipends	\$ -	\$ -	\$ -	\$ -	\$ 2,500	\$ -
Travel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Supplies & Materials	\$ -	\$ -	\$ -	\$ 3,573	\$ 1,000	\$ 84
Contractual Services	\$ -	\$ -	\$ -	\$ 28,000	\$ 4,077	\$ 14,926
Other Costs	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 239,047
TOTAL \$:	\$ 68,054	\$ 31,487	\$ 10,000	\$ 661,669	\$ 22,977	\$ 527,398



Revolving & Special Funds

----- State Reimbursement, Revolving, Special Revenue Accounts -----									
	Circuit Breaker	Bus Transportation	School Lunch	PreK Tuition	Medicaid Reimburse	Instrumental Lessons	Facility Use	Student Activity	Athletic Revolving
FY27 Expense Assumption \$:	\$ 781,233	\$ 522,717	\$ 1,083,931	\$ 504,759	\$ 109,944	\$ 21,520	\$ 56,873	\$ 141,640	\$ 36,398

Circuit Breaker

In Massachusetts, the Special Education Circuit Breaker is a state-funded program designed to assist school districts when managing the financial impact of high-cost and fluctuating special education services through a formal reimbursement program. This funding acts as a safety net for unanticipated special education costs.

In the table below, the “Total Payments Received” refers to the total reimbursement funds (*3 Fund Types*) the State sends to the district in each fiscal year. The "Total Expended" refers to the total funds (*2 Expense Types*) that are required to be expended in each fiscal year. “Prepay” are funds that pay for legally eligible expenses in the following fiscal year.

SPS Circuit Breaker	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	<i>Budget</i> FY2026	<i>Forecast</i> FY2027
Beginning Account Balance:	\$ 942,503	\$ 1,086,277	\$ 1,491,400	\$ 1,290,772	\$ 1,016,800	\$ 959,767	\$ 1,134,025	\$ 965,366	\$ 1,291,492
Reimbursement Received:	\$ 1,086,277	\$ 1,491,400	\$ 1,290,772	\$ 1,016,800	\$ 959,767	\$ 1,134,025	\$ 917,493	\$1,291,492	\$ 1,200,000
Extraordinary Relief:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Supplemental Award:	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 47,873	\$ -	\$ -
TOTAL PAYMENTS RECEIVED:	\$ 1,086,277	\$ 1,491,400	\$ 1,290,772	\$ 1,016,800	\$ 959,767	\$ 1,134,025	\$ 965,366	\$ 1,291,492	\$ 1,200,000
Circuit Breaker Expense:	\$ (663,941)	\$ (92,156)	\$ (581,131)	\$ (603,278)	\$ (611,825)	\$ (416,646)	\$ (792,608)	\$ (965,366)	\$ (1,291,492)
Prepay Next Fiscal Year	\$ (278,562)	\$ (994,121)	\$ (910,269)	\$ (687,494)	\$ (404,975)	\$ (543,121)	\$ (341,416)		
TOTAL EXPENDED:	\$ (942,503)	\$ (1,086,277)	\$ (1,491,400)	\$ (1,290,772)	\$ (1,016,800)	\$ (959,767)	\$ (1,134,025)	\$ (965,366)	\$ (1,291,492)
Ending Balance:	\$ 1,086,277	\$ 1,491,400	\$ 1,290,772	\$ 1,016,800	\$ 959,767	\$ 1,134,025	\$ 965,366	\$ 1,291,492	\$ 1,200,000



Total General Fund Budget with Other Funding

EXPENSE (DOE Function Category)	General Fund	Other Funding						TOTAL
	Proposed \$	Total Grants \$	PreK Tuition	Circuit Breaker	Bus Revenue	School Lunch	Student Activity	
Administration	\$1,396,070							\$ 1,396,070
Instructional Leadership	\$4,438,357	\$ 115,830	-	-	-	-	-	\$ 4,554,187
Teachers	\$24,772,363	\$ 109,541	-	-	-	-	-	\$ 24,881,904
Other Teaching Services	\$6,731,474	\$ 803,007	\$ 504,759	\$ 781,233	-	\$ 112,653	\$ 141,640	\$ 9,074,766
Professional Development	\$340,939	2,500	-	-	-	-	-	\$ 343,439
Instructional Materials/Equip/Tech	\$749,243	\$ 51,660	-	-	-	-	-	\$ 800,903
Guidance, Counseling, Testing	\$2,200,344	-	-	-	-	-	-	\$ 2,200,344
Pupil Services	\$3,828,863	\$ 239,047	-	-	\$ 522,717	-	-	\$ 4,590,627
Operations and Maintenance	\$3,188,352	-	-	-	-	-	-	\$ 3,188,352
Fixed Charges	\$213,574	-	-	-	-	-	-	\$ 213,574
Out-of-District Expenditures	\$1,392,847	-	-	-	-	-	-	\$ 1,392,847
TOTAL EXPENSE \$:	\$ 49,252,426	\$ 1,321,585	\$ 504,759	\$ 781,233	\$ 522,717	\$ 112,653	\$ 141,640	\$ 52,637,013

Contract Agreement Budgetary Impact - FY27

Unit	FY27 Agreement Terms	Increase in Dollars
Teachers	2.0% + Longevity	\$1,442,413
Support Professionals	2.0% + Longevity	\$165,987
Custodians	2.0% + Longevity	\$39,115
Nurses	OPEN	-
Other (non-union)	Varies	\$129,573
Total Salary Increase		\$1,777,088



Full-Time Equivalents (FTE) Changes

	---- General Fund ----		---- Grant Funds ----		-- Revolving Funds --		---- TOTAL ----	
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
FY26 Base Total	442.186	472	21.000	22	10.500	11	473.686	505
Enrollment Changes:	(1.000)	(1)	0.000	0	0.000	0	(2.000)	(1)
Level Service:	0.000	0	0.000	0	0.000	0	0.000	0
Strategic Priorities:	(2.000)	(2)	0.000	0	2.000	2	0.000	0
Other Critical Needs:	0.000	0	0.000	0	0.000	0	0.000	0
FY27 Budget	439.186	469	21.000	22	12.500	13	471.686	504
Total +/- diff.:	(3.000)	(3)	0.000	0	2.000	2	(2.000)	(1)

Five-Year Capital Plan, FY27 Capital Requests and Warrant Articles

The Capital items below are submitted for the Town Meeting's consideration. All of the following capital projects are on the [SPS 5-15 Year Capital Plan](#) for FY27.

Schools Carpet Replacement	CIP_FY27_SPS FAC-1	\$40,000
Ongoing carpet replacement program <i>Funding Source Recommendation: <u>Town Manager Small Capital</u></i>		
VCT Replacement	CIP_FY27_SPS FAC-2	\$40,000
Ongoing tile replacement program with Vinyl Composition Tile (VCT) in all schools. <i>Funding Source Recommendation: <u>Town Manager Small Capital</u></i>		
Bathroom Partitions and Replacements	CIP_FY27_SPS FAC-3	\$25,000
<i>Repair and/or replace bathroom partitions in all schools. Funding Source Recommendation: <u>Town Manager Small Capital</u></i>		
Painting	CIP_FY27_SPS FAC-4	\$40,000
Ongoing painting program at all schools. <i>Funding Source Recommendation: <u>Town Manager Small Capital</u></i>		
Ceiling Tile Replacements	CIP_FY27_SPS FAC-5	\$25,000
Ongoing ceiling tile replacement program at all schools. <i>Funding Source Recommendation: <u>Town Manager Small Capital</u></i>		



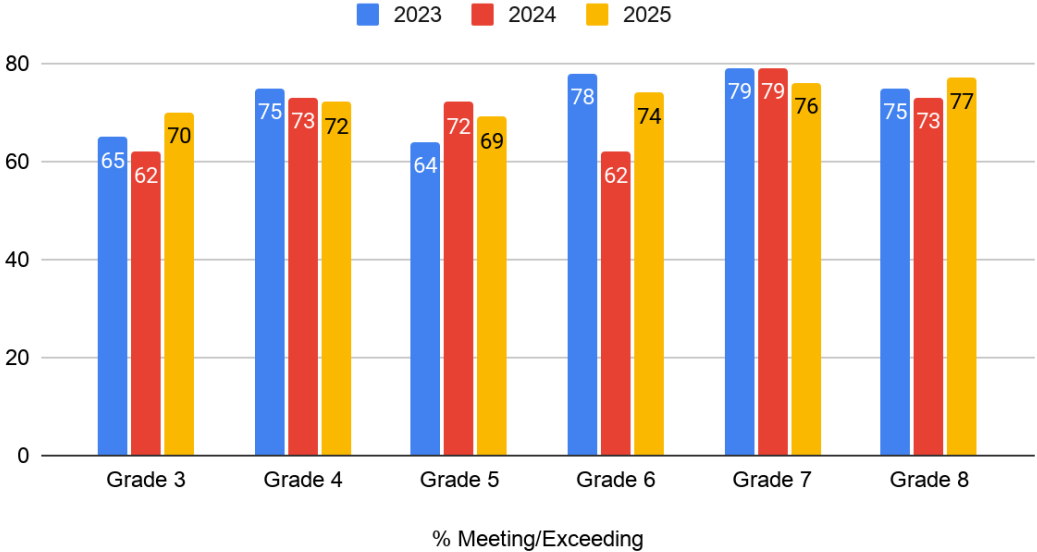
School Exterior Metal Doors	CIP-FY27_SPS FAC-6	\$25,000
Ongoing Exterior Metal Door replacement program at all schools. <i>Funding Source Recommendation: <u>Town Meeting Warrant Article</u></i>		
School Safety Enhancements	CIP-FY27_SPS FAC-7	\$450,000
Infrastructure improvements to improve school safety at all schools.		
Fire Alarm and Emergency Lighting Repairs/Replacements and Bi-Directional Amplification System Installation	CIP_FY27_SPS FAC-8	\$660,500
Fire alarm and emergency lighting repairs and replacement project for Curtis, Loring, and Haynes schools; For all schools: installation of a bi-directional amplification system design project. <i>Funding Source Recommendation: <u>Town Meeting Warrant Article</u></i>		
Building Management System Capital Repairs	CIP_FY27_SPS FAC-9	\$110,000
This funding will be used to replace failed elements of the building management system throughout all five schools. <i>Funding Source Recommendation: <u>Town Meeting Warrant Article</u></i>		
Classroom Instructional Equipment Replacement	ATM Warrant	\$100,000
Interactive Display, Wireless Video Projection, and Auditory Support (~20 total classrooms) <i>Funding Source Recommendation: <u>Town Meeting Warrant Article</u></i>		



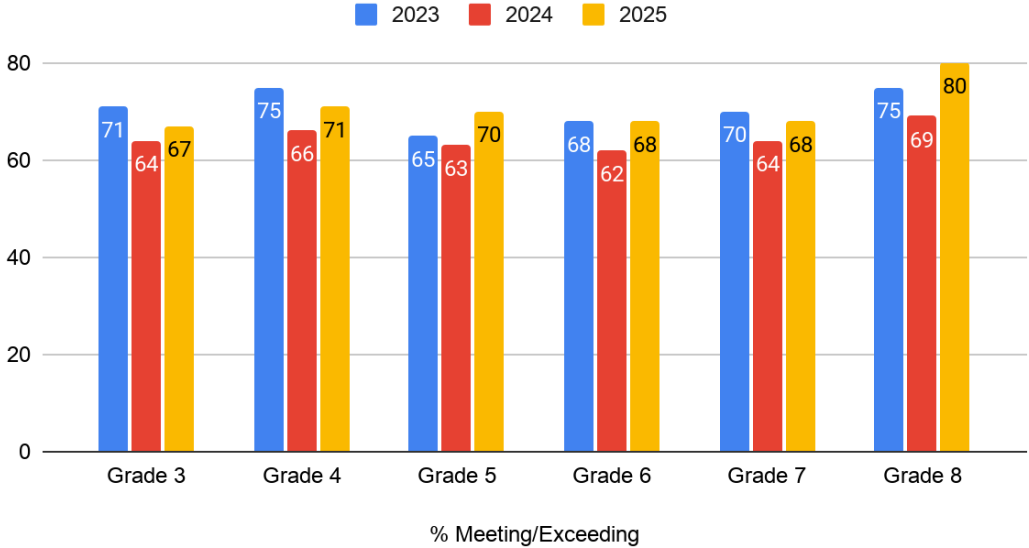
MCAS Outcomes

The summary data from 2023-2025 including all grade levels shows steady growth and high achievement. The expected range for growth, which is the Student Growth Percentile (SGP) is 40-60. SPS has met that target growth rate with an average SGP of 59 in both math and ELA. SPS was honored by the state for reaching pre-pandemic levels in mathematics in 2025.

Mathematics



English Language Arts



METCO

SPS has been a Metropolitan Council for Educational Opportunities (METCO) district since 1975. Our charter allows us 70 student seats. Sudbury receives grant funding from the Commonwealth which is used to fund transportation, a director, program liaisons, bus monitors, membership fees, and extended day/year services for students. SPS students participating in the METCO program matriculate to Lincoln Sudbury Regional High School.



	Kinder- garten	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
25-26	3	7	7	10	7	2	11	12	9
24-25	7	4	10	7	2	10	12	9	7
23-24	4	9	8	2	10	8	7	7	8
22-23	8	8	2	12	6	8	8	8	7
21-22	8	2	11	4	8	8	7	7	6
20-21	4	8	3	6	11	7	8	8	6
19-20	6	4	7	11	7	9	8	9	10
18-19		5	7	6	11	9	11	10	8
17-18		8	8	12	10	10	9	10	3

**Note enrollment reflects October 9, 2025 data*



English Learners

SPS delivers services to English Learners (EL) using a Sheltered English Immersion (SEI) model. Students receive structured English Language Development (ELD) instruction until they meet Department of Elementary and Secondary Education guidelines for exiting the ELD program. After exiting, students are monitored for 6 years. Students whose families opt out of ELD services are also monitored using district and state measures. SPS follows state guidelines for service delivery to the best of its ability, meaning that “newcomers” receive more intensive services than those whose English language skills are reaching the proficiency level of native speakers. At this time, SPS has 17 students qualifying for “foundational services” equaling 450 minutes per week, and 41 students qualifying for “transitional services” equaling 225 minutes per week. Families of students receiving EL services receive progress updates.



	PK	K	Gr 1	Gr 2	Gr 3	Gr 4	Gr 5	Gr 6	Gr 7	Gr 8	Total	FEL*
25-26	6	15	15	11	7	4	2	1	2	2	58	77
24-25	3	17	14	13	9	4	4	2	1	1	68	77
23-24	5	17	18	13	8	6	3	1	1	2	74	65
22-23	5	15	16	8	11	7	1	1	1	0	65	74
21-22	4	13	6	20	7	6	3	2	3	1	65	58
20-21		3	13	14	11	8	4	4	2	1	59	54
19-20		14	13	14	8	8	7	2	1	1	68	41
18-19		11	12	6	7	7	3	1	3	1	51	36
17-18		12	7	7	4	2	5	1	0	1	39	34

*Former English Learner



Student Services

Sudbury Inclusion Statement: All means ALL

Sudbury Public Schools is committed to being an inclusive environment where all students are full members of our school community. We hold to the belief that all individuals should be respected, valued, and included by peers, teachers, parents, and the community at large. We are an inclusive environment where all students feel safe and thrive socially, emotionally, physically, and academically.

The Student Services Team

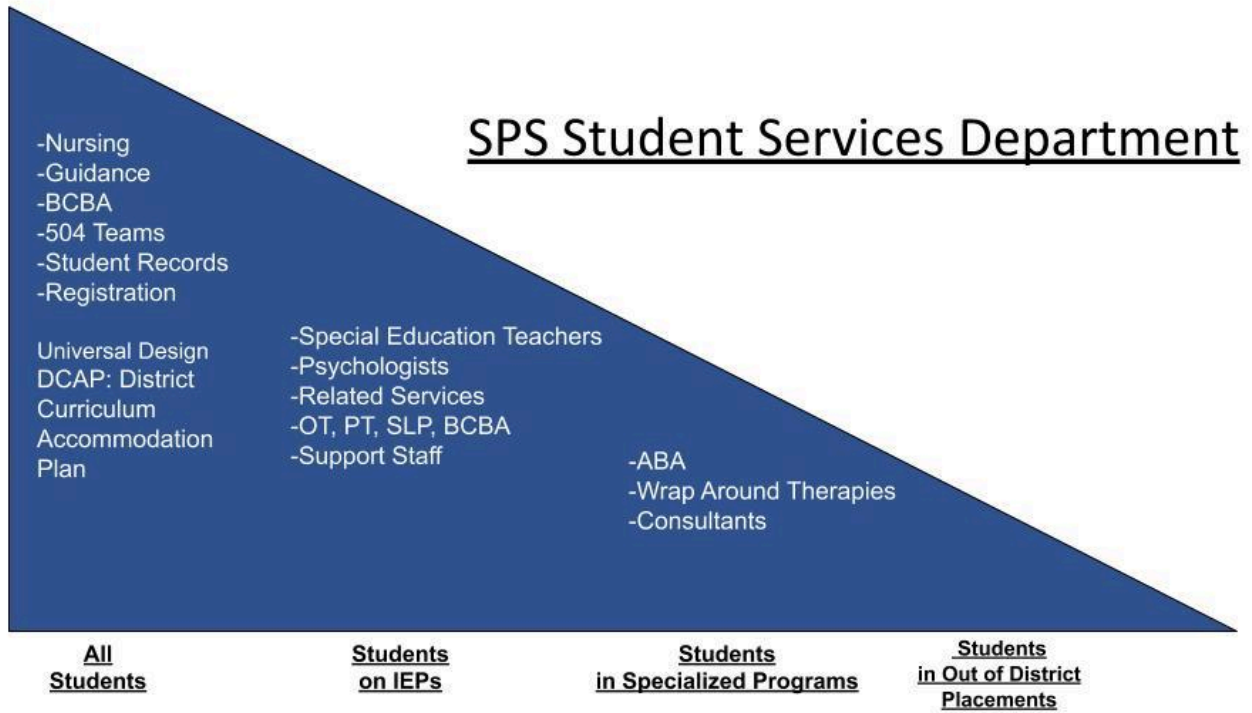
The Student Services team is composed of both General and Special Educators who support all students. This includes:

- Special Education Team Chairs
- Nurses
- Guidance Counselors
- Social Workers
- Adjustment Counselors
- Psychologists
- Special Education Teachers
- Board Certified Behavioral Analysts (BCBAs)
- Occupational Therapists (OT)
- Physical Therapists (PT)
- Speech and Language Therapists (SLP)
- Education Support Professionals, including Teaching Assistants, Tutors and Applied Behavior Analysis (ABA) Tutors



Services and Continuum

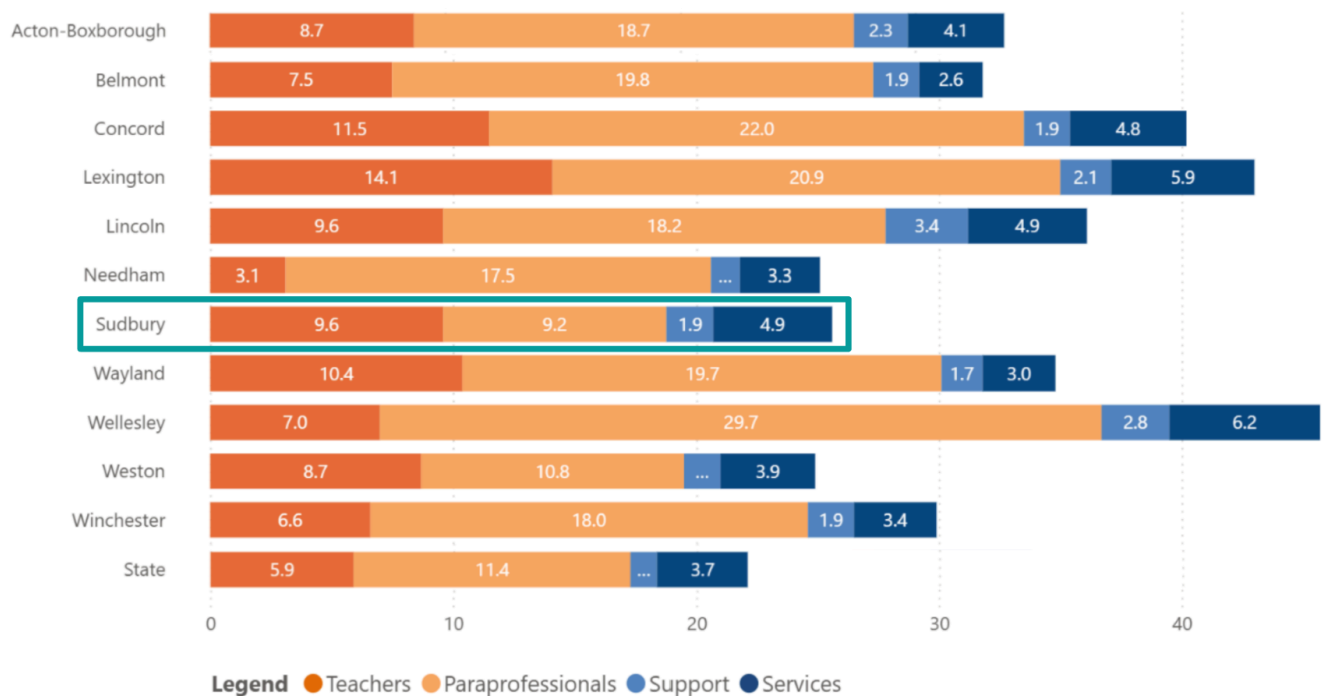
The Department of Student Services supports all PK-8 students.



Staffing Comparables

Sudbury has invested in special education teachers to work with students, while keeping the number of paraprofessionals in balance. The allocation of teachers and services is substantial. Additionally, Sudbury has fewer total FTEs in the special education department than eight of our comparable districts. This data fluctuates based on student needs each year.

The data below shows the number of special education FTEs per 100 Students With Disabilities (SWDs).



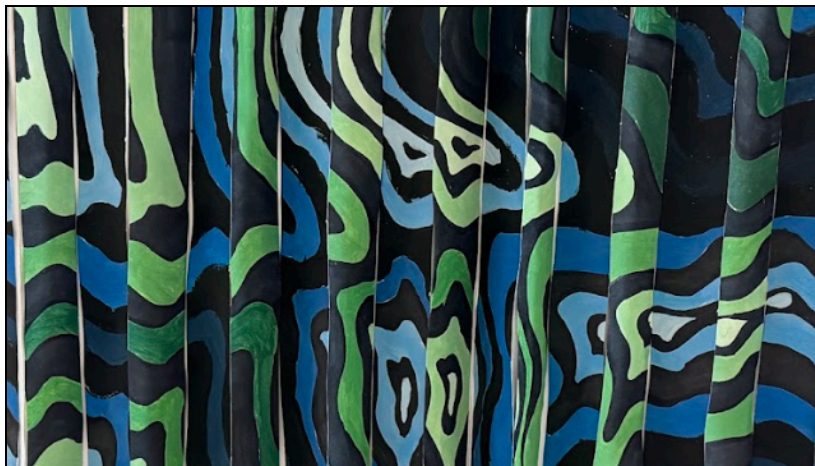
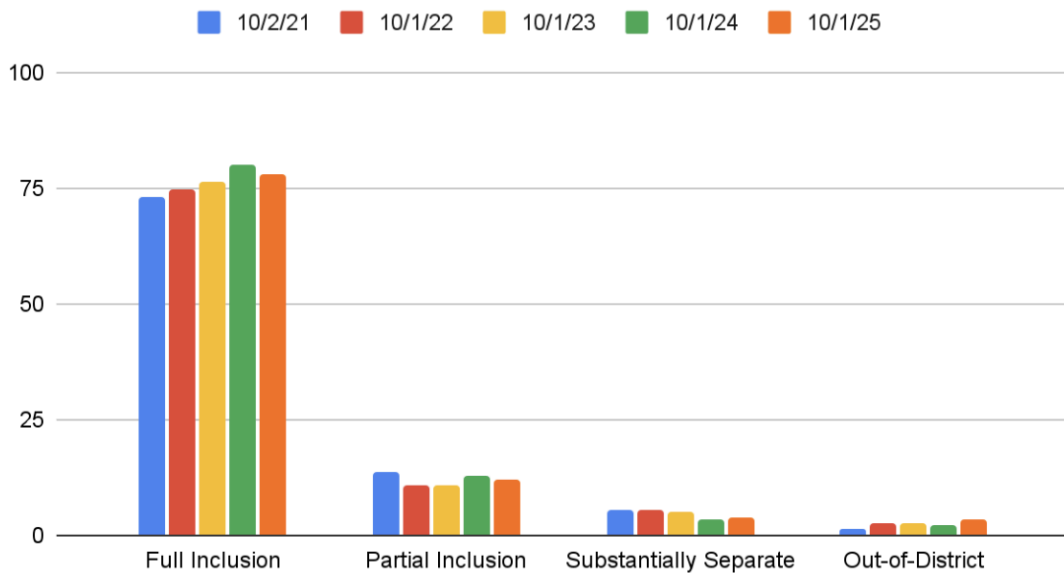
Source: DESE (Department of Elementary and Secondary Education) RADAR (Resource Allocation and District Allocation Reports)



Special Education Enrollment

Over the past five years, there has been an increase in the number of students receiving special education services K-8. However, there remains a commitment by the district to invest in robust inclusive practices in both full and partial inclusion placements with in-district programming. The continuum of service delivery intensifies with the need for out-of-district placements, though the trend remains relatively stable.

% of Students on IEPs by Placement



Technology

These are the principles that inform how the technology department supports the District's Goals:

- To offer technology resources that enhance teaching and learning
- To provide tools that promote achievement, creativity, and collaboration for all students
- To provide the data resources needed to support assessments and inform instruction
- To support the full range of technology services needed in a modern school environment

Instructional Resources

The district is dedicated to ensuring all students have equitable access to technology. In elementary schools, classrooms in grades K-1 share one laptop cart between every two classrooms, while grades 2-5 have one cart per classroom. At the middle school level, a 1:1 program provides every student with a laptop for both school and home use. This program leverages a learning management system, Schoology, to enhance classroom organization and connectivity.

Teachers are equipped with a range of technology resources, including laptops and projection devices. Recent additions, such as document cameras, interactive displays, audio systems, online learning management platforms, and video conferencing tools, expand the standard set of tools available. These innovations support diverse instructional methods and approaches.

Online Subscriptions

The Sudbury Public Schools maintains a range of online resources that support both instruction and operations. The budget prioritizes funding for assessment and skill reinforcement platforms. Many of these online resources are funded through the Student Services budget, further enhancing access to educational tools.

As new technologies emerge, it shapes the direction of our professional learning and best practices, including working with teachers to develop responsible use of generative AI for enhanced instruction and learning. The district maintains a high level of commitment to student data privacy in its online systems and secures data privacy agreements with vendors through the Student Data Privacy Consortium.



The Year in Review

Professional Development Focus

Sudbury Public Schools prioritizes high-quality professional development for educators. Our goal is to ensure that all staff have access to ongoing learning opportunities that support their growth and enhance student learning. During the 2025-26 school year, a sampling of our work includes:

- **EL Curriculum Training:** Elementary classroom teachers, literacy specialists, ELD teachers, and special educators in grades K-5 are in their first year of implementing the Expeditionary Learning (EL) curriculum in English Language Arts. In addition to professional development led by EL coaches, our teams attend planning meetings weekly at the school level and bi-weekly and monthly at the district level.
- **Middle School Science:** At the middle school, the OpenSciEd curriculum is in its second year of a 3-year implementation. This science curriculum incorporates significant shifts in teaching practices, grade-level content distribution, and expectations for student work, as we align each of these more fully with the Next Generation Science Standards. Ongoing PD focuses on differentiation of OpenSciEd materials and learning activities, formative and summative assessments, and evidence-based reflection on each unit taught.
- **IEP Implementation:** SPS continues to implement the revised Individualized Education Program (IEP) framework to better support the needs of students with disabilities. The special education teams are continuing to refine this work.

Educational Programming Disability Awareness

Sudbury Public Schools received a grant from the Sudbury Foundation which enabled the district to provide tailored lessons in disability awareness in grades 3-5 during the 2024-2025 school year. SPS is grateful to have been able to continue this work in the 2025-2026 school year thanks to an additional Sudbury Foundation grant, which has provided professional development and modeling for classroom teachers. Lessons include topics such as: physical disabilities, cognitive differences, autism, and anxiety. Directly teaching students about specific disabilities establishes a strong, consistent foundation for continuing education in the area of disability awareness. Sudbury educators will take over the instructional piece of these lessons in the 2026-2027 school year.

Say Something Anonymous Reporting System (ARS)

Last year, SPS launched the Say Something Anonymous Reporting System. Students in grades 4-8 learned how to recognize warning signs and threats—whether on social media, in school, or within the community—from individuals who may pose a danger to themselves or others. The Say Something ARS program is provided by Sandy Hook Promise (SHP), a national non-profit organization. They have a proven track record and extensive experience working effectively with children, parents, and educators to improve school safety and culture. We continue to partner with SHP this year and train students in grades 4-8 and as well as all district staff.



UDL Retrofit

The UDL Retrofit project is a five-year initiative designed to modernize instructional tools in all SPS classrooms, ensuring both teachers and students have access to a unified set of resources that support inclusive teaching and learning. Guided by the principles of Universal Design for Learning (UDL), the project prioritizes tools that meet the diverse needs of all students, including those requiring specialized support. In our first two years, the Sudbury Public Schools successfully deployed 48 Touchview interactive displays and 72 Lightspeed Redcat audio systems to classrooms at all five schools.

Student Art Gallery

Sudbury has a strong fine arts program. SPS K-8 art teachers have collaborated to create a Sudbury Student Art Gallery at the SPS Central Office. The 2026 installation and Student Art Gallery celebration will be held on February 25, 2026. At the Student Art Gallery events, student artists are recognized and the community is invited to join the celebration and appreciate their work.

The Year Ahead

Elementary ELA (English Language Arts) Curriculum Update

Educators will continue the implementation of Expeditionary Learning (EL) for the elementary ELA curriculum. The focus area for implementation in year two will turn toward assessments and data. Educators will be oriented in using the EL data tracking systems, collaborate on data interpretation, and review data and student samples to determine the implications for instruction. A revised ELA report card will be implemented in the next school year which will reflect the most recent ELA framework presented by DESE (Department of Elementary and Secondary Education). In middle school, we will embark on the full implementation of benchmark writing assessments which will occur in English and social studies classrooms. In all these scenarios, district Literacy Specialists will support teachers' collaboration efforts as well as provide individualized coaching. Additionally, special educators will continue to develop their proficiency in modifying the EL curriculum in order to make sure that we are supporting all learners with their individual needs.

Math Course Pathways Revision:

As part of the completion of our updated mathematics course progression, eighth-grade students will have the opportunity to enroll in an elective course focused on eighth grade Geometry standards. This revised progression is designed to strengthen students' readiness for Algebra in eighth grade and Geometry in ninth grade, while also allowing additional time in seventh grade to develop essential foundational skills. In FY26, we introduced a new course level for seventh grade students, and in FY27, we will complete the transition with the introduction of the Geometry course.



Science Curriculum Update

As we enter the final phase of our multi-year strategic rollout, the district remains committed to delivering a rigorous, phenomenon-based science curriculum that fosters critical thinking and student agency across all grade levels. Middle school educators will continue the implementation of OpenSciEd, a high-quality, phenomenon-based program that connects science practices and concepts to real-world observations. The program is rooted in meaningful real-world experiences that bridge the gap between abstract principles and tangible observations. To ensure a cohesive experience, elementary educators are utilizing a revised curriculum that prepares younger students for this instructional model, allowing them to take greater ownership of their learning through investigation, questioning, and drawing conclusions. This transition is supported by the Science and Engineering Curriculum Specialist and the Instructional Coach, who provide curriculum development, materials management, targeted professional development, and co-teaching and planning to ensure instructional success across all grade levels.

METCO

Sudbury METCO Department is committed to providing students and families enriching and supportive opportunities to thrive. These opportunities include:

- Stem4everyone, which is a math tutoring program that provides free 1:1 math tutoring to METCO students from select METCO districts via Zoom to help build strong math skills, while providing targeted support and personalized attention.
- SPS is collaborating with Lincoln-Sudbury's METCO program to increase access to sports participation. The Lincoln-Sudbury's Sports Bus makes a stop at Curtis Middle School on Mondays-Thursdays before picking up athletes from L-S and then continues to Boston. This collaboration strengthens the connection between the middle and high schools, promoting a sense of community and shared identity.

Nixon and Haynes Roof Project

The Sudbury Public Schools are committed to investing in essential infrastructure that is essential to ensuring the best outcomes for students. Over the past year, District staff have worked with the Massachusetts School Building Authority (MSBA) to design and implement a new roofing system for the Josiah Haynes Elementary School as well as replace approximately 50% of the General John Nixon Elementary School's roof. This partnership with the MSBA will provide a 41.32% reimbursement of the roof replacement costs. We are committed to improving physical spaces for students across the district, and to significantly accelerate our progress toward that goal during our yearly capital planning efforts.

UDL (Universal Design for Learning), Year 3

In the third year of our classroom UDL retrofit initiative, we will continue expanding access to interactive displays, audio enhancement systems, and document cameras, further modernizing the instructional tools available in Sudbury Public Schools classrooms. Our commitment to equitable and inclusive education remains steadfast as we integrate technology that removes barriers to learning, enhances engagement, and supports diverse instructional needs.





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