



**Monomoy Regional School District - Monomoy Regional School Committee
Meeting Agenda for Thursday, April 9, 2026 at 6:30 PM
Monomoy Regional High School Library, 75 Oak Street, Harwich, MA 02645**

This meeting will be broadcast to Channel 22 as well as live-streamed/recorded to the [MRSC YOUTUBE CHANNEL](#)

AGENDA

- A. Call to Order**
- B. Adjourn to Executive Session: Roll Call Vote to adjourn to Executive Session pursuant to M.G.L. c. 30A, sec. 21(a)(2) to conduct contract negotiations with nonunion personnel and review Central Office job descriptions. Regular Open Session to resume at approximately 7:00 PM.**
- C. Approval of Meeting Minutes**
 - i. March 26, 2026 Regular Business Meeting
- D. MRHS Student Representative**
- E. Public Comment:** Speakers are limited to three minutes; additional time is at the discretion of the Chairperson
- F. Reports and Discussions**
 - i. NSDC Award for Academic Growth and Student Leadership
 - ii. Curriculum Update
 - iii. 2025-2026 Superintendent Summative Process and Documents (First read April 30, Second read May 14)
 - iv. School Committee Meeting Dates (Add April 30th, Move May 21th to May 28th)
 - v. General Obligation Bond Anticipation Notes **VOTE REQUIRED**
 - vi. MRHS Donation to Animal Legal Defense Fund **VOTE REQUIRED**
 - vii. First Reading Policy Files: File DJG: Vendor Relations, File IM-MSP: Middle School Pathway Exploration Policy
- G. Subcommittee, Representative, Liaison Reports**
 - i. Policy Subcommittee
 - ii.
- H. Superintendent's Report**
 - i. Recognitions, including After-Prom supporters
- H. Action Items -Vote Required**
 - i. General Obligation Bond Anticipation Notes
 - ii. MRHS Donation to Animal Legal Defense Fund
- I. Presentation of the Warrants**
- J. Adjournment**

Authorized Posting Officer

Roberta Simmons

April 7, 2026



**Monomoy Regional School District - Monomoy Regional School Committee
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Monomoy Regional High School Library, 75 Oak Street, Harwich, MA 02645**

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Members present: Meredith Henderson, Brad Schiff, Jackie Zibrat-Long, Ryan Edwards, Betty Gray, Brett Fortin

Members not present: Stephen Davol, Ryan Clarke

Administrators present: Dr. Scott Carpenter, Robin Millen, Michael MacMillan, Joy Jordan

AGENDA

A. Call to Order

Meredith Henderson called the meeting to order at 6:30 PM

B. Approval of Meeting Minutes

i. March 12, 2026 Regular Business Meeting

MOTION: Jackie Zibrat-Long motioned to approve the March 12, 2026 Regular Business Meeting minutes, seconded by Brett Fortin.

UNANIMOUS: the motion passes

C. Public Comment: Speakers are limited to three minutes; additional time is at the discretion of the Chairperson
None

D. Reports and Discussions

i. FY 27 Budget

VOTE REQUIRED

MRSD Business Manager, Michael MacMillan, presented the School Committee with updates on the FY27 budget since the last meeting.

FY27 Draft Budget	\$51,735,982
FY27 Draft Assessment to the Town of Harwich	\$33,104,137
FY27 Draft Assessment to the Town of Chatham	\$11,737,053

The budget by Major Account is provided below. Any subsequent change to Major Account budgets requires the approval of the School Committee.

Major Account	Budget
Operations and Maintenance	\$ 4,706,103
Acquisition, Improvement and Replacement of Fixed Assets	\$ 240,000
Administration	\$ 1,300,446
Benefits and Fixed Charges	\$ 10,716,114
Debt and Retirement Service	\$ 2,055,150
Instructional Leadership	\$ 3,038,083
Instructional Materials, Equipment and Technology	\$ 1,350,762
Guidance, Counseling and Testing	\$ 1,680,977
Other Teaching Services	\$ 4,211,842
Professional Development	\$ 481,631
Programs with Other School Districts	\$ 2,962,451
Pupil Services	\$ 4,149,338
Teachers	\$ 14,843,085
Grand Total	\$ 51,735,982

- The proposed budget for FY27 is \$51,735,982, with a 5.07% increase compared to last year.
- The budget process has faced challenges due to delays and administrative changes within Harwich.
- Changes made to the budget included a reduction of 10.5 positions in response to declining student enrollment (approximately 9-10% decrease over the last 2-3 years).
- Significant reductions include:
 - Elimination of central office vacancies and administrative positions due to low enrollment.
 - Increased use of excess and deficiency funds to mitigate costs, now set at \$900,000.
 - Adjustments in support services and special education staffing to align with current student needs.

Participant Insights and Concerns

- Members voiced concerns about maintaining level services amid budget constraints; future challenges are anticipated if enrollment continues to decline.
- There is a collective desire for increased engagement and earlier discussions with town administrations regarding budget implications, emphasizing the importance of transparency and planning.
- A proposal for a summer budget workshop was suggested to better understand finances and future needs.

Next Steps and Action Items

- Approval of the FY27 budget as presented.
- Continue discussions on the enrollment trend and its impact on future staffing and services.
- Plan for the proposed summer budget workshop to enhance collaboration with town officials.

MOTION: Brad Schiff motioned to approve the FY27 Budget and Assessments as presented to the School Committee, seconded by Betty Gray.

UNANIMOUS: the motion passes

ii. Y Achievers College Field Trip

POTENTIAL VOTE

Christina Silva from the YMCA gave an overview of the college tour field trip for the MRHS Y Achievers members over April vacation.

Program Overview

- Y Achievers Program supports BIPOC and first-generation teens.
- Focus on career and college readiness through various activities:
 - Guest speakers share their professional journeys.
 - Development of skills: interviewing, advocacy, and cultural awareness.
 - Engagement in social cultural trips and discussions about different cultures.

Upcoming College Tour Details

- April College Tour scheduled from April 21st to April 25th.
 - Visits to a mix of colleges, including Sarah Lawrence College, Iona University, Morgan State University, Coppin State University, Montclair State University and Pratt Institute.
 - Objective: expose students to campus life and help them make informed college choices.
 - Planned activities include attending a Broadway show.
- Costs: Entire trip funded by the YMCA, with no expenses for students.

Due to the timing of the field trip, the School Committee members agreed to vote tonight.

MOTION: Jackie Zibrat-Long motioned to approve the Y Achievers field trip, seconded by Brad Schiff.

UNANIMOUS: the motion passes

iii. 2026-2027 MRHS Trip to Italy

VOTE REQUIRED

MRSD School Committee member Ryan Edwards wanted to acknowledge the amazing field trips and opportunities that the students of Monomoy are able to participate in and hope that they continue for many years.

MOTION: Jackie Zibrat-Long motioned to approve the 2026-2027 MRHS trip to Italy, seconded by Ryan Edwards.

UNANIMOUS: the motion passes

iv. MRHS Donation to Family Table Collaborative

VOTE REQUIRED

MOTION: Jackie Zibrat-Long motioned to approve the MRHS donation to the Family Table collaborative, seconded by Ryan Edwards.

UNANIMOUS: the motion passes

v. Participation in School Choice Program FY27

VOTE REQUIRED

MRSD Superintendent, Scott Carpenter, shared information regarding the participation in the School Choice program for the 2026-2027 school year.

- Annual vote required by Massachusetts law for school districts.
- Allows families to enroll in different school districts if they choose.
- Students can stay in the district until graduation once enrolled.
- Recommendation: Continue as a receiving district for school choice.
- Focus on not 'stealing' students from each other.
- Operate on a free seat model, filling available seats without exceeding capacity.
 - Aim for 18 students per classroom, keeping space for local families.

MOTION: Ryan Edwards motioned to approve Monomoy Regional School District's participation in the School Choice program for FY27, seconded by Betty Gray.

UNANIMOUS: the motion passes

vi. Surplus Materials

VOTE REQUIRED

MRSD Business Manager, Michael MacMillan, presented the surplus material details to the Committee. The athletic department has two cold plunge tubs. One tub is in good condition but is rarely used and the heating element is not functioning, it was donated to the district a few years ago. The department wishes to surplus the unused tub. The tub will be listed for sale on Municibid auction site.

MOTION: Jackie Zibrat-Long motioned to approve the District's cold plunge tub as surplus equipment and authorize the School Business Manager to dispose of said property in accordance with Massachusetts General Law Chapter 30B, seconded by Brett Fortin.

UNANIMOUS: the motion passes

vii. Pitney Bowes 5-year Contract Approval

VOTE REQUIRED

MRSD Business Manager, Michael MacMillan, provided information about the Pitney Bowes contract. We are seeking approval for a five-year lease agreement with Pitney Bowes for postage meters. The lease includes quarterly payments and is a continuation of existing equipment. The contract falls under state procurement guidelines.

MOTION: Brad Schiff motioned to authorize the District to enter into a five-year lease agreement with Pitney Bowes for five postage meters, seconded by Jackie Zibrat-Long.

UNANIMOUS: the motion passes

viii. Second Reading: 2026-2027 School Calendar, 2 Options

POTENTIAL VOTE

The School Committee continued discussion on the two options for the 2026-2027 school calendar: pre-Labor Day start and post-Labor Day start. Dr. Carpenter's recommendation is to adopt the pre-Labor Day start for next year which has already received support from the union. The previous concerns regarding contractual obligations and potential delays due to construction challenges at the middle school were the reason for the post-Labor day option. However, since our last meeting we have a new plan in place with Pearl Construction that will alleviate the loss of a week due to snow days this year by vacating the grade 5 wing after Juneteenth.

- Suggestions for future calendars include accommodating requests for specific days off and considering family dynamics during calendar planning.
 - Noted concerns about professional development days coinciding with long weekends.
- Explore incorporating student feedback in future calendar discussions.
- Continue discussions with the union regarding professional development scheduling.

MOTION: Ryan Edwards motioned to approve the 2026-2027 school calendar option one, before Labor Day start, seconded by Brett Fortin.

UNANIMOUS: the motion passes

E. Subcommittee, Representative, Liaison Reports

None

F. Superintendent's Report

i. Recognitions

It was a great season for the Monomoy Cheer team, who came in 7th at New Englands and earned a bid to nationals - well done!

Bravo to Monomoy Middle School for a great production of Fiddler on the Roof! Opening night was last night, they are currently performing right now, and you can catch one more show tomorrow at 6:30 p.m.

Congratulations to the Monomoy High Jazz Band, which brought home multiple gold medals in recent competitions. At the Massachusetts Association of Jazz Educators' Cape Coastal District Festival on March 3, the Jazz Band earned a gold medal, which qualified them for the State Finals on March 14, where they again earned the gold medal. Thanks to those impressive achievements, the musicians will next perform in the MAJE Gold Medal Showcase at the Hatch Shell in Boston on Sunday, May 3. The MRHS Jazz Band is led by retired Berklee College of Music professor Wayne Naus, who donates his time to work with an ever-growing group of students.

The students in the SHORE program have been working on their grant writing skills, and at the recent reopening of the Harwich Stop & Shop, the program received a donation of \$10,000 from Stop & Shop. These funds will support the Food Pantry at the high school operated by the SHORE students and comes after a similar donation from Stop & Shop last year.

The Harlem Wizards will return to Monomoy High tomorrow night for a fun family event - the game between the Wizards and a team of Monomoy faculty and staff superstars starts at 6:30 p.m.

H. Action Items -Vote Required

i. FY 27 Budget

MOTION: Brad Schiff motioned to approve the FY27 Budget and Assessments as presented to the School Committee, seconded by Betty Gray.

UNANIMOUS: the motion passes

ii. Y Achievers College Field Trip

MOTION: Jackie Zibrat-Long motioned to approve the Y Achievers field trip, seconded by Brad Schiff.

UNANIMOUS: the motion passes

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UNANIMOUS: the motion passes

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UNANIMOUS: the motion passes

viii. 2026-2027 School Calendar

MOTION: Ryan Edwards motioned to approve the 2026-2027 school calendar option one, before Labor Day start, seconded by Brett Fortin.

UNANIMOUS: the motion passes

I. Presentation of the Warrants

Presentation of the Warrants Accounts Payable and Payroll Warrants were presented for MRSC member signatures.

J. Adjournment

MOTION: Jackie Zibrat-Long moved to adjourn the meeting, seconded by Betty Gray.

The meeting was adjourned at 7:34 PM.

Respectfully Submitted,
Roberta Simmons
Recording Secretary



CURRICULUM, INSTRUCTION, AND ASSESSMENT UPDATE

Ms. Lindsey Hooper, g. 5-12 ELA/Humanities Curriculum Director

Ms. Kristen Callahan, g. 5-12 Mathematics/STEM Curriculum Director

Dr. Robin Millen, Assistant Superintendent, Curriculum, Instruction, and Assessment

APRIL 9, 2026



Strategic Plan: Learning and Academics

Curricular Excellence:

1. Integrate literacy and mathematics across all disciplines with effective instructional strategies, evidence-based resources, and professional development for all educators
2. Allocate resources to ensure all students have access to high-quality learning experiences

Differentiation:

1. Embed effective and evidence-based instructional strategies that encompass diverse learning styles

Strategic Plan: Portrait of a Graduate Implementation

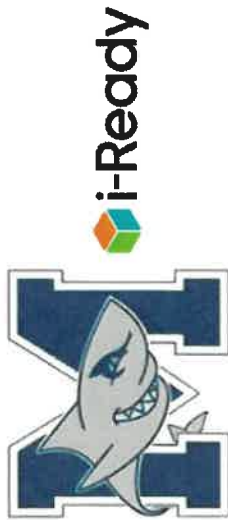
Portrait of a Graduate Across the preK-12 Curriculum

1. Align curriculum with the skills and competencies in the Portrait of a Graduate

iReady Mathematics (year 1 implementation)

- High-quality resource adoption g. K-7
- 10 Professional Learning Sessions for Educators
 - Introducing iReady Classroom Mathematics
 - Starting Strong with iReady
 - Foundations of Classroom Mathematics
 - Understanding the Try-Discuss-Connect Instructional Framework
- Corresponding Leadership Learning Sessions
 - Introducing i-Ready Classroom Mathematics for Leaders
 - Cultivating an Inclusive and Productive Learning Community
 - Leading the Shift to Student-Centered Learning





Early Indicators
of Success:

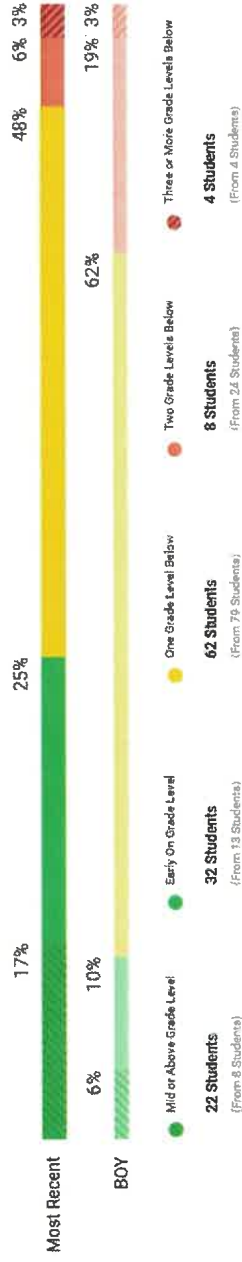
MATHEMATICS

**“GROWING THE GREEN,
MELOWING THE YELLOW,
AND
REDUCING THE RED...”**



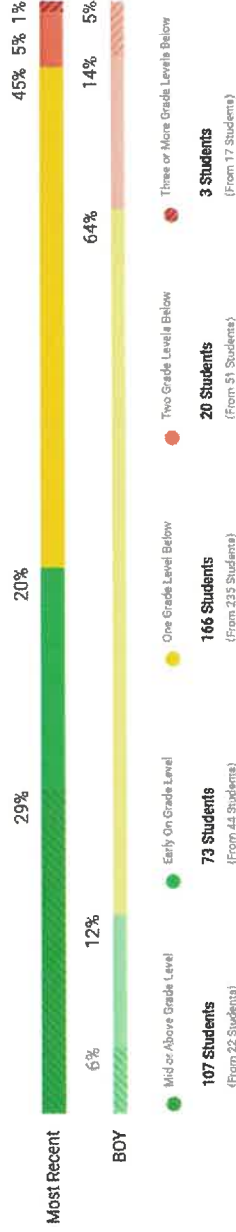
CHATHAM ELEMENTARY

Overall Placement
Students Assessed/Total: 128/134



HARWICH ELEMENTARY

Overall Placement
Students Assessed/Total: 369/380





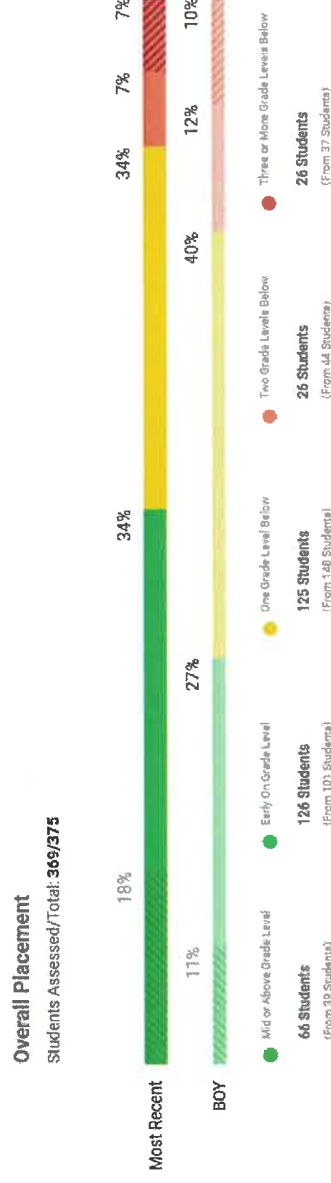
Early Indicators
of Success:

MATHEMATICS

**“GROWING THE GREEN,
MELLOWING THE YELLOW,
AND
REDUCING THE RED...”**



MONOMOY REGIONAL MIDDLE SCHOOL



Next Steps:

- Year 2 Implementation
 - Continued professional learning; walkthroughs, “mini” professional learning sessions, and new teacher training
 - Monitor for continued success



MATH & READING

Strategic Plan: Learning and Academics

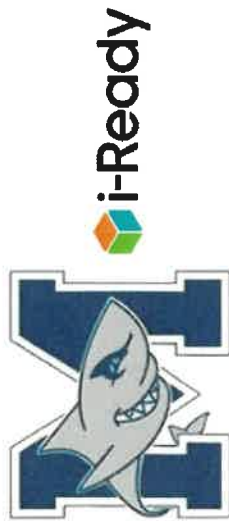
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2. Utilize culturally responsive teaching strategies and diverse curricular materials to support various learning styles and needs
3. Promote early literacy development through partnerships with families and caregivers, early childhood providers, and community organizations
4. Continue to identify and address systemic inequalities that contribute to achievement disparities
5. Allocate resources to ensure all students have access to high-quality learning experiences

iReady Diagnostic (Inform) and MyPath (g. K-8) for Reading and

Mathematics (year 1 implementation):

- Replaced MAP-NWEA Diagnostic September 2026
- Diagnostic: measures student proficiency against grade-level standards and norms for **Mathematics and Reading**
- **MyPath:** a personalized, digital learning program that provides tailored instruction
- Provided additional professional learning sessions for implementing the Diagnostic and MyPath
 - Using Data to Plan Instruction
 - Monitoring and Responding to Personalized Instruction
 - Understanding and Responding to Student Growth



Early Indicators
of Success:

READING

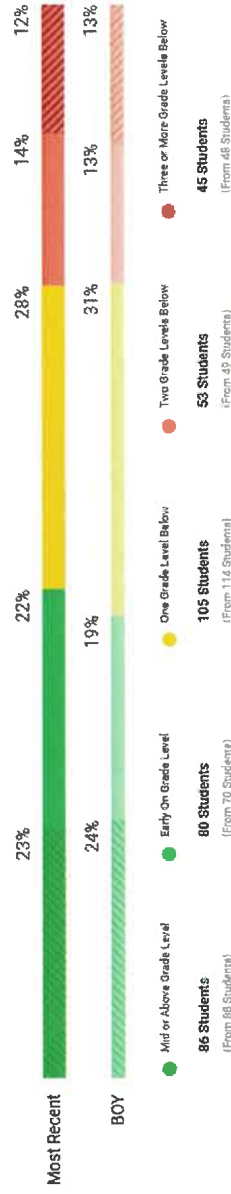
**“GROWING THE GREEN,
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MONOMOY REGIONAL MIDDLE SCHOOL

Overall Placement

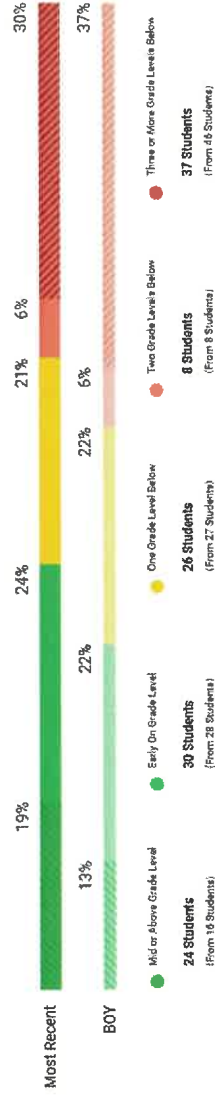
Students Assessed/Total: 369/375



MONOMOY REGIONAL GRADE 8

Overall Placement

Students Assessed/Total: 125/161





Early Indicators
of Success:

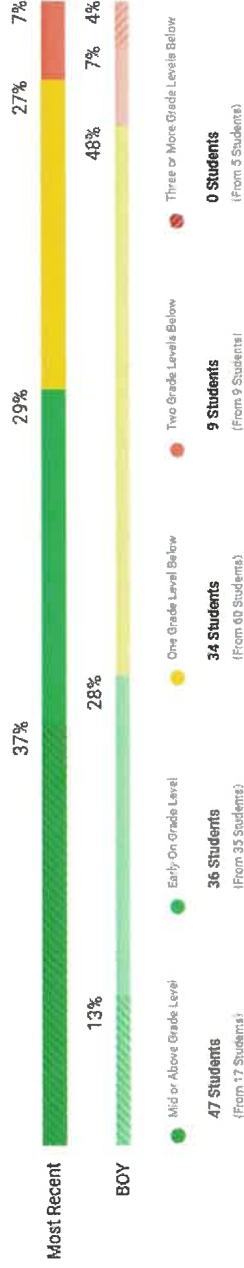
READING

**“GROWING THE GREEN,
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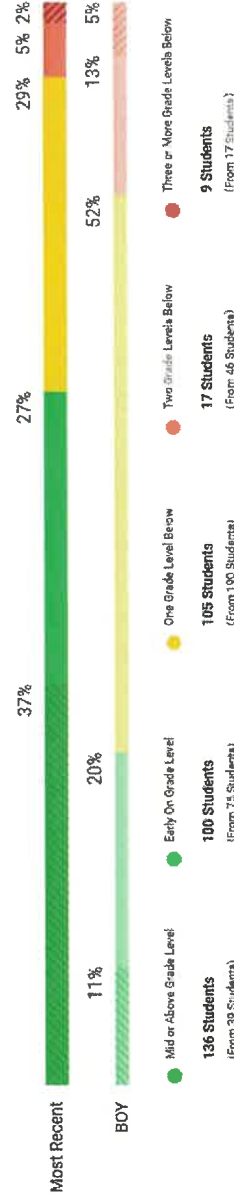
CHATHAM ELEMENTARY

Overall Placement
Students Assessed/Total: 126/134



HARWICH ELEMENTARY

Criterion Referenced
Overall Placement
Students Assessed/Total: 367/380



DATA MATTERS ...

- At Harwich Elementary, we are seeing a remarkable surge in foundational growth, with **student progress in Math and ELA outperforming state targets** as we lean into new literacy and numeracy models.
- At Chatham Elementary, our small-school environment is yielding big results, **maintaining some of the highest 'High Needs' student growth percentiles in the region**, proving our focus on high-quality, universally designed instruction reaches every learner.
- At Monomoy Regional Middle School, we've seen a **'Moderate to Strong' growth trend in Mathematics**, a critical period where many students globally start to slide—but **ours are climbing**.
- And at the Monomoy Regional High School, our **English Language Arts growth hit 58%—well above the state average**.

When we look at school data, it's easy to get caught up in a single score. But the real story of Monomoy is the educational momentum happening in every building, every day.



ELA/LITERACY

Strategic Plan: Learning and Academics

Curricular Excellence:

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3. Promote early literacy development through partnerships with families and caregivers, early childhood providers, and community organizations
4. Continue to identify and address systemic inequalities that contribute to achievement disparities
5. Allocate resources to ensure all students have access to high-quality learning experiences

District Literacy Leadership Team (year 3)

- Expanded from g. K-4 to g. preK-12 in Sept. 2026
- MRSD Literacy Plan Action Steps 2025-2026
- Continued revision of MRSD's Literacy Plan
- Professional learning: UFLI (year 2) implementation walkthroughs, Science of Reading (year 3) Course; new teacher training
- Embedded equity pauses
- Next steps:
 - Final year-will move to ELA Task Force



PRISM Task Force (year 1)

- PRISM (year 1) planning grant-preK high-quality instructional material adoption process with DESE consultants
- Coaching team, curriculum council team, and pilot team-monthly professional learning sessions and offered two professional learning sessions to community partners
- 2 pilots are planned (1-April, 1-May)
- Next steps:
 - selection of resources, applied for a continuation grant, and implementation



preK-12 ELA and Writing Task Force (year 3)

- Developed a common understanding of writing instruction at MRSD, mapped the progression of skills PK-12
- Embedded 3x/year common assessments focused on writing skills g. K-12
- Next steps/Action Planning:
 - Professional Development and implementation of common writing instruction across PK-12 grade levels, collecting student work PK-12 to analyze, incorporating writing instructional strategies into other content areas (Social Studies, Math, Science, Art, etc.)
 - Integrating this work into the Monomoy PK-12 Literacy Plan





Science, Technology, and Engineering (STE) Task Force: Building a Coherent PreK–12 STE Program

COORDINATING PREK–12 LEARNING ACROSS SCIENCE, ENGINEERING, COMPUTER SCIENCE, AND DIGITAL LITERACY

- Multi-disciplinary, cross-grade work requiring alignment across multiple standards and systems
- Multi-year implementation, minimum 3-year effort to ensure alignment and sustainability



Strategic Plan: Learning and Academics

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KEY FIRST STEP: DESE SPA AMBASSADOR TRAINING (JUNE 4–5)

- 7 Monomoy MS and HS teachers participating
- Prepares for next-generation STE MCAS (2027) with embedded performance-based tasks
- Aligns instruction with applied, real-world learning
- Builds internal capacity to lead district-wide professional learning



WHAT THIS UNLOCKS

- Classroom-based assessments aligned to DESE expectation
- Opportunity to align 3–5 and 6–8 teams
- Strengthens connections across PreK–4, 5–7, and 8–12 grade spans

Outcome: A more aligned, rigorous, and future-ready STE program across Monomoy

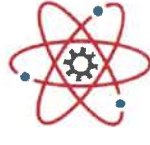
DID YOU KNOW THAT 63.4% OF MONOMOY STUDENTS COMPLETE COURSEWORK IN DIGITAL LITERACY AND COMPUTER SCIENCE? THAT IS **NEARLY DOUBLE THE STATE AVERAGE OF 38%**. OUR CURRICULUM ISN'T JUST MEETING STANDARDS; IT'S OUTPACING THE REST OF MASSACHUSETTS TO ENSURE OUR KIDS ARE THE ONES LEADING THE FUTURE WORKFORCE.





STEM & PLTW Middle School → High School

Expanding STEM Access: Automation & Robotics for All Middle School Students



PROJECT LEAD THE WAY
PLTW

Strategic Plan: Learning and Academics

Curricular Excellence:

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The PLTW Expansion Grant supports equitable access to high-quality STEM, ensuring all students, not just a subset, experience Automation & Robotics (A&R)

Why this matters: A&R access has been limited by equipment and scheduling constraints

How the Grant Supports Expansion

- Funds robotics equipment to scale access
- Builds teacher capacity through training
- Enables full Middle School implementation of A&R



Strategic Shift

- Students apply engineering, coding, and systems thinking in authentic contexts
- Ensures consistent preparation for high school PLTW pathways



3-Year Implementation

- Year 1-2: Expand access and build capacity
- Year 3: All A&R participation by Grade 7

Outcome: A coherent, equitable STEM pipeline from middle school to high school



EXPANDING STUDENT OPPORTUNITIES FOR FUTURE-READINESS



- **Innovation Career Pathway**

- Waiting on grant approval
- Thank you to the community partners and MAHire for their support!

Strategic Plan: Learning and Academics

Civic Engagement and Real-World Learning

1. Continue to strengthen a robust PK-12 civics curriculum that incorporates competencies of the Portrait of the Graduate
2. Expand opportunities for students to participate in service learning projects and community engagement initiatives
3. Ensure that the curriculum integrates awareness of local and global perspectives
4. Create opportunities for students to engage in local, national, international, and cross-cultural experiences

Multiple Learning and Exploration Pathways

1. Expand life skills instruction into the curriculum, covering areas such as health and wellness, personal finance, and career exploration
2. Nurture partnerships with local businesses and organizations to provide real-world experiences and mentorship opportunities



- **Quincy College-Dual Enrollment Program**



- **PRISM Implementation Grant**

- Waiting on grant approval



- **Review the results and recommendations from DESEs Targeted and Focused Monitoring (TFM) and of our English Learner Education Program and MAECs Equity Audit**



- Waiting on DESE final report
- Will present MAECs Equity Audit results and proposed first action steps to the school committee in June



**THANK YOU FOR YOUR
CONTINUED SUPPORT!**



End-of-Cycle Summative Evaluation Report: Superintendent

Superintendent: Scott Carpenter

Evaluator:

Name

Signature

Date

Step 1: Assess Progress Toward Goals (Reference performance goals; check one for each set of goal[s].)

Professional Practice Goal(s)	☐ Did Not Meet	☐ Some Progress	☐ Significant Progress	☐ Met	☐ Exceeded
Student Learning Goal(s)	☐ Did Not Meet	☐ Some Progress	☐ Significant Progress	☐ Met	☐ Exceeded
District Improvement Goal(s)	☐ Did Not Meet	☐ Some Progress	☐ Significant Progress	☐ Met	☐ Exceeded

Step 2: Assess Performance on Standards (Reference Performance Ratings per Standard; check one box for each Standard.)

Unsatisfactory = Performance on a standard or overall has not significantly improved following a rating of *Needs Improvement*, or performance is consistently below the requirements of a standard or overall and is considered inadequate, or both.

Needs Improvement/Developing = Performance on a standard or overall is below the requirements of a standard or overall but is not considered to be Unsatisfactory at the time. Improvement is necessary and expected.

Proficient = *Proficient practice is understood to be fully satisfactory. This is the rigorous expected level of performance.*

Exemplary = A rating of *Exemplary* indicates that practice significantly exceeds *Proficient* and could serve as a model of practice regionally or statewide.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
Standard I: Instructional Leadership	☐	☐	☐	☐
Standard II: Management and Operations	☐	☐	☐	☐
Standard III: Family and Community Engagement	☐	☐	☐	☐
Standard IV: Professional Culture	☐	☐	☐	☐

End-of-Cycle Summative Evaluation Report: Superintendent

Step 3: Rate Overall Summative Performance (Based on Step 1 and Step 2 ratings; check one.)

☐ Unsatisfactory

☐ Needs Improvement

☐ Proficient

☐ Exemplary

Step 4: Add Evaluator Comments

Comments and analysis are recommended for any rating but are required for an overall summative rating of *Exemplary*, *Needs Improvement* or *Unsatisfactory*.

Comments:

Superintendent's Performance Goals

Superintendents must identify at least one student learning goal, one professional practice goal, and two to four district improvement goals. Goals should be SMART and aligned to at least one focus Indicator from the Standards for Effective Administrative Leadership.

Goals		Focus Indicator(s)	Description		Did Not Meet	Some Progress	Significant Progress	Met	Exceeded
Professional Practice Goal #1	IV-B and IV-D		Take the DESE Sheltered English Immersion endorsement course, aimed at supporting English Language Learners' academic success in schools.		☐	☐	☐	☐	☐
Professional Practice Goal #2	III-A and IV-B		A continuation of last year's goal, now transitioning the Breaking Barriers program to a Y Achievers program. The Superintendent will support a successful launch of the YMCA Cape Cod's Y Achievers program at our high school.		☐	☐	☐	☐	☐
Student Learning Goal #1	I-D		A focused extension of last year's walkthrough goal, based on requested feedback from the Monomoy Administrative Team. The Superintendent will provide mid-year and end-of-year feedback to administrators on their evaluation write-ups to support strong teaching and learning and unified feedback practices across the administrative team.		☐	☐	☐	☐	☐
Student Learning Goal #2	I-A		Operationalize the School Committee Goal #5, to explore Universal Preschool for 4-year-olds in Harwich and Chatham.		☐	☐	☐	☐	☐
District Improvement Goal #1	II-A		A continuation of last year's goal that was paused due to a lack of grant funding. With the temporarily restored funding, move forward the School Committee's Goal #2 of supporting "a Diversity, Equity, and Inclusion audit within our district."		☐	☐	☐	☐	☐
District Improvement Goal #2	II-B		Provide for a seamless transition with the next Superintendent of Monomoy Regional Schools.		☐	☐	☐	☐	☐
District Improvement Goal #3	IV-C		The Superintendent will work with building principals and the administrative team to operationalize the School Committee Goal #3, strengthening Employee engagement based on the results of the Staff survey (Spring 2025).		☐	☐	☐	☐	☐

Standards and Indicators for Effective Administrative Leadership <i>Superintendents should identify 1-2 focus indicators per Standard aligned to their goals.</i>			
I. Instructional Leadership	II. Management & Operations	III. Family & Community Engagement	IV. Professional Culture
I-A. Curriculum	II-A. Environment	III-A. Engagement	IV-A. Commitment to High Standards
I-B. Instruction	II-B. HR Management and Development	III-B. Sharing Responsibility	IV-B. Cultural Proficiency
I-C. Assessment	II-C. Scheduling & Management Information Systems	III-C. Communication	IV-C. Communication
I-D. Evaluation	II-D. Law, Ethics and Policies	III-D. Family Concerns	IV-D. Continuous Learning
I-E. Data-Informed Decisionmaking	II-E. Fiscal Systems		IV-E. Shared Vision
I-F. Student Learning			IV-F. Managing Conflict



Superintendent's Performance Rating for Standard I: Instructional Leadership

Rate each focus Indicator and indicate the overall Standard rating below. (*Focus Indicators are those aligned to superintendent goal(s).)

	U	NI	P	E
I-A. Curriculum: Ensures that all instructional staff design effective and rigorous standards-based units of instruction consisting of well-structured lessons with measureable outcomes. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
I-B. Instruction: Ensures that practices in all settings reflect high expectations regarding content and quality of effort and work, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
I-C. Assessment: Ensures that all principals and administrators facilitate practices that propel personnel to use a variety of formal and informal methods and assessments to measure student learning, growth, and understanding and make necessary adjustments to their practice when students are not learning. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
I-D. Evaluation: Ensures effective and timely supervision and evaluation of all staff in alignment with state regulations and contract provisions. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
I-E. Data-Informed Decision Making: Uses multiple sources of evidence related to student learning—including state, district, and school assessment results and growth data—to inform school and district goals and improve organizational performance, educator effectiveness, and student learning. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
I-F. Student Learning: Demonstrates expected impact on student learning based on multiple measures of student learning, growth, and achievement, including student progress on common assessments and statewide student growth measures where available. ☐ Focus Indicator (check if yes)	The Student Learning indicator does not have corresponding descriptions of practice. Evidence of impact on student learning based on multiple measures of student learning, growth, and achievement must be taken into account when determining a performance rating for this Standard.			
OVERALL Rating for Standard I: Instructional Leadership The education leader promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes powerful teaching and learning the central focus of schooling.	☐	☐	☐	☐

Comments and analysis (recommended for any overall rating; required for overall rating of *Exemplary*, *Needs Improvement* or *Unsatisfactory*):



Superintendent's Performance Rating for Standard II: Management & Operations

	U	NI	P	E
Rate each focus Indicator and indicate the overall Standard rating below. (*Focus Indicators are those aligned to superintendent goal(s).)				
II-A. Environment: Develops and executes effective plans, procedures, routines, and operational systems to address a full range of safety, health, emotional, and social needs. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
II-B. Human Resources Management and Development: Implements a cohesive approach to recruiting, hiring, induction, development, and career growth that promotes high-quality and effective practice. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
II-C. Scheduling and Management Information Systems: Uses systems to ensure optimal use of data and time for teaching, learning, and collaboration, minimizing disruptions and distractions for school-level staff. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
II-D. Law, Ethics, and Policies: Understands and complies with state and federal laws and mandates, school committee policies, collective bargaining agreements, and ethical guidelines. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
II-E. Fiscal Systems: Develops a budget that supports the district's vision, mission, and goals; allocates and manages expenditures consistent with district- and school-level goals and available resources. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
OVERALL Rating for Standard II: Management & Operations The education leader promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.	☐	☐	☐	☐

Comments and analysis (recommended for any overall rating; required for overall rating of *Exemplary*, *Needs Improvement* or *Unsatisfactory*):

Superintendent's Performance Rating for Standard III: Family and Community Engagement



Rate each focus Indicator and indicate the overall Standard rating below. (*Focus Indicators are those aligned to superintendent goal(s).)

	U	NI	P	E
III-A. Engagement: Actively ensures that all families are welcome members of the classroom and school community and can contribute to the effectiveness of the classroom, school, district, and community. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
III-B. Sharing Responsibility: Continuously collaborates with families and community stakeholders to support student learning and development at home, school, and in the community. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
III-C. Communication: Engages in regular, two-way, culturally proficient communication with families and community stakeholders about student learning and performance. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
III-D. Family Concerns: Addresses family and community concerns in an equitable, effective, and efficient manner. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
OVERALL Rating for Standard III: Family & Community Engagement The education leader promotes the learning and growth of all students and the success of all staff through effective partnerships with families, community organizations, and other stakeholders that support the mission of the district and its schools.	☐	☐	☐	☐

Comments and analysis (recommended for any overall rating; required for overall rating of *Exemplary*, *Needs Improvement* or *Unsatisfactory*):



Superintendent's Performance Rating for Standard IV: Professional Culture

Rate each focus Indicator and indicate the overall Standard rating below. (*Focus Indicators are those aligned to superintendent goal(s).)

	U	NI	P	E
IV-A. Commitment to High Standards: Fosters a shared commitment to high standards of service, teaching, and learning with high expectations for achievement for all. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
IV-B. Cultural Proficiency: Ensures that policies and practices enable staff members and students to interact effectively in a culturally diverse environment in which students' backgrounds, identities, strengths, and challenges are respected. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
IV-C. Communication: Demonstrates strong interpersonal, written, and verbal communication skills. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
IV-D. Continuous Learning: Develops and nurtures a culture in which staff members are reflective about their practice and use student data, current research, best practices, and theory to continuously adapt practice and achieve improved results. Models these behaviors in his or her own practice. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐
IV-E. Shared Vision: Successfully and continuously engages all stakeholders in the creation of a shared educational vision in which every student is prepared to succeed in postsecondary education and become a responsible citizen and global contributor.	☐	☐	☐	☐

☐ Focus Indicator (check if yes)					
IV-F. Managing Conflict: Employs strategies for responding to disagreement and dissent, constructively resolving conflict and building consensus throughout a district or school community. ☐ Focus Indicator (check if yes)	☐	☐	☐	☐	☐
OVERALL Rating for Standard IV: Professional Culture The education leader promotes the learning and growth of all students and the success of all staff by nurturing and sustaining a districtwide culture of reflective practice, high expectations, and continuous learning for staff.	☐	☐	☐	☐	☐
Comments and analysis (recommended for any overall rating; required for overall rating of Exemplary, Needs Improvement or Unsatisfactory):					

Scott Carpenter's Goals 2025-2026

April Update

Professional Practice Goal #1

Take the DESE Sheltered English Immersion endorsement course, aimed at supporting English Language Learners' academic success in schools.

Action steps:

- Take the course (Wednesdays 4:30-7:30, September 17 through December 17)
- Complete all assignments and projects
- Update my licensure paperwork with DESE. Note: Superintendents are not required to have SEI endorsement.

April Update: Completed. Attended class. Finished the course with an A average and SEI Endorsement.

Professional Practice Goal #2

A continuation of last year's goal, now transitioning the Breaking Barriers program to a Y Achievers program. The Superintendent will support a successful launch of the YMCA Cape Cod's Y Achievers program at our high school.

Action Steps:

- With the Community Engagement Coordinator, meet with the YMCA Director of the Y Achievers program
- Stipend and recruit an appropriate advisor from the high school staff to lead this club from the "school-side" during the 2025-2026 school year, and build the stipend into the FY27 Budget
- With the team, recruit new Y Achievers, meet with the student-Achievers, and have a parent meeting with our Y Achievers
- Support the college and career exploration of this club with an outing this Fall and Spring
- Ultimately, hand the new club off to the YMCA Director and the Monomoy Advisor

April Update: I recruited a MRHS graduate/college graduate, Chevar Shakespeare to help recruit students and to work with them, and Christina Silva of the YMCA Cape Cod's Y Achievers. I hosted a parent meeting for the group on October 7th, including dinner. I attended most of the Y-Achievers meetings at the high school during Jawsome on Day 7s. I took our Y-Achievers (and many of their parents) to Amherst College and UMASS Amherst on October 18, 2025, to see two very different types of schools, understand what was required to matriculate into these colleges, and explore how they can make both colleges affordable. Thirteen Monomoy students will be attending the Y Achiever college visits over April Vacation.

Student Learning Goal #1

A focused extension of last year's walkthrough goal, based on requested feedback from the Monomoy Administrative Team. The Superintendent will provide mid-year and end-of-year feedback to administrators on their evaluation write-ups to support strong teaching and learning and unified feedback practices across the administrative team.

Action Steps:

- In January and May, review all administrators' evaluation feedback
- Meet individually with each advisor to go over their feedback and to coach them on areas for improvement
- Provide the MAT Team with a summary of this feedback in January and May, along with ways the team can improve and be more unified in their approach.

April Update: February 10th the administrative team shared examples of formative assessments with their colleagues in an effort to look at consistency across write-ups, including identifying both strengths and next steps, including specific wording from the standards, including language on what they could consider or do to elevate their performance (like moving from proficient to exemplary)The January component will take place over the next two weeks. A similar process will be done closer to the end-of-the year for summative write-ups. I'll be meeting with individuals and building teams, ensuring timelines are met.

Student Learning Goal #2

Operationalize the School Committee Goal #5, to explore Universal Preschool for 4-year-olds in Harwich and Chatham.

Action Steps:

- Communicate with town leaders the long-term educational benefits of universal preschool for ALL children.
- Work with the Assistant Superintendent to research other universal preschool approaches in the region.
- With the support of the Monomoy Family Resource Coordinator, conduct a survey of family interest in universal preschool for 4-year-olds in both towns
- Report back to the School Committee the results of the survey, feedback from town leaders, and feedback on our new PUPS Program at Chatham Elementary School (which reflects a potential universal preschool model).

April Update: We have been talking about PreK with leadership in both towns. With the Assistant Superintendent and Director of Student Services, we have visited (in-person and virtually) Sandwich and Mashpee to discuss their approaches, and have researched grant funding. The Commonwealth Preschool Partnership Initiative (CPPI) grant, used by Sandwich and Barnstable and other communities throughout Massachusetts to expand PreK initiatives

was ultimately not funded in FY26, so this initiative was paused pending funding to support expansion of PreK during otherwise challenging fiscal times.

Pups continues to be a strong model and has a waiting list for FY27. For the full-day Pups PreK at CES, there were 16 applicants for 10 slots. A lottery was conducted, and families were notified of the result and the waitlist.

Integrated PreK continues to have declining numbers of students with special needs, and therefore a reduction in the number of Integrated PreK for FY27. For the half-day Integrated PreK at HES, there were 15 applicants for 6 slots. Again, a lottery was conducted and families notified.

District Improvement Goal #1

A continuation of last year's goal that was paused due to a lack of grant funding. With the temporarily restored funding, move forward the School Committee's Goal #2 of supporting "a Diversity, Equity, and Inclusion audit within our district."

Action Steps:

- With the Community Engagement Coordinator and Assistant Superintendent, work with MAEC in September 2025 on an expedited Equity Audit while grant money is still available
- Develop and provide to MAEC a feasible scope of work and timeline to make the audit happen before the end of September
- Communicate the expedited process to the entire Admin Team and enlist their support
- Communicate about and conduct required surveys
 - Staff Survey
 - Student Survey
 - Parent/Caregiver Survey
- Conduct Building-Level Equity Audits with teams from each school and guide them through the consensus process
- Provide additional data to MAEC as needed
- Continue working with MAEC during the Fall as they analyze the data and produce the Equity Audit Report
- Present the findings to the School Committee and share them with the community
- Develop action steps to implement recommendations from that report

April Update: The beginning of this year found court orders restoring funding for MAEC at least until the end of September. Our district was quickly able to bring teams together and conduct all remaining surveys to complete a full equity audit. MAEC has compiled its report and, on April 2, shared an overview of it with the Superintendent, Assistant Superintendent, and Community Engagement Coordinator. During the week of April 27, MAEC will be sharing the findings with the teams at each school building. During faculty meetings in May, the findings will be shared

with the staff with an expectation that collectively at least two building-level action steps will be identified. On June 11, there will be a public presentation of the Equity Audit findings to the MRSD School Committee.

District Improvement Goal #2

Provide for a seamless transition with the next Superintendent of Monomoy Regional Schools.

Action Steps:

- Support the Hiring Subcommittee in its work with the consultant (MASC)
- Meet with the incoming Superintendent
- Have electronic files organized and in place for the incoming Superintendent
- Ensure the incoming Superintendent has a role in the hiring process of staff for the following school year for any position hired prior to July 1, 2025

April Update: The Superintendent has supported the Chair, Vice Chair, and Hiring Subcommittee as requested. I have begun working with Dr. Millen to support a seamless transition in the role. I fully intend to keep supporting her up to my final day with the district.

District Improvement Goal #3

The Superintendent will work with building principals and the administrative team to operationalize the School Committee Goal #3, strengthening Employee engagement based on the results of the Staff survey (Spring 2025).

Action Steps:

- With the administrative team, identify building-level and district-level opportunities to improve staff engagement
- Assess the impact of changes made

April Update: During the summer of 2025, the administrative team spent part of a summer retreat day unpacking the SY2025 MRSD Employee Survey. We looked at the results within each building and district-wide. Thematically, the five areas where staff expressed more concerns or dissatisfaction was with “being thanked for their work”, access to professional development, collaboration between departments/grades/schools, being aware of the Employee Assistance Program, and having an “appropriate” salary. Coming out of the retreat, we had committed to implementing a monthly Staff Shout Out, soliciting input from parents and colleagues, and celebrating a member of staff each month. We have shared this shout-out in newsletters, and every recipient is given a framed certificate and a small gift. The current plan is to conduct the MRSD Employee Survey every other year, so not until 2027. The Community Engagement Coordinator has been invaluable in organizing the monthly shout-outs.

Indicator Rubric for Superintendent Evaluation

*The **Indicator Rubric for Superintendent Evaluation** is an evaluation tool intended to support a shared understanding of effective leadership practice between a superintendent and school committee members.*

Designed around the 21 Indicators from the Standards of Effective Administrative Leadership (603 CMR 35.04), the Indicator Rubric includes descriptions of a superintendent's practice for each *Indicator* and articulates the specific responsibilities that a school committee may be expected to reasonably evaluate. This is a significant departure from the more detailed, *element-level* rubrics associated with other educator roles in the model system for educator evaluation.

While this structural difference results in a shorter, less complex evaluation tool, it does *not* simplify the responsibilities of a superintendent. All 21 Indicators associated with the four Standards of Effective Administrative Leadership remain in place, and the superintendent is still expected to meet expectations associated with each Standard, typically assessed by focusing on one to two Indicators per Standard each year. Describing practice at the Indicator level rather than at the element level acknowledges the following unique components of an educator evaluation process conducted by a school committee:

- **The Role of the School Committee:** The school committee's role is governance, rather than management. A school committee thereby focuses on the *what* and the *why* (governance) of superintendent leadership, rather than the *how* (management). The Indicator Rubric does the same.
- **The Composition of a School Committee:** The school committee as "evaluator" is comprised of multiple individuals, rather than a single evaluator. This demands consensus building, a process made exponentially easier when focused around fewer descriptors of practice.
- **The Focus of a School Committee:** School committee members, many of whom are often non-educators, focus primarily on the outcome of a superintendent's work, rather than the details of implementation. The Indicator Rubric guides committee members to maintain this focus.
- **A Public Process.** The superintendent's evaluation is the only educator evaluation conducted in public. The Indicator Rubric includes the practices to which a committee can reasonably be expected to have access or insight, such that the public process of collecting and evaluating evidence may be conducted with transparency and integrity.

STANDARD I: Instructional Leadership

The education leader promotes the learning and growth of all students and the success of all staff by cultivating a shared vision that makes powerful teaching and learning the central focus of schooling.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-A: Curriculum	Does not ensure the implementation of standards-based units of instruction across the district (e.g. fails to provide adequate resources or training).	Ensures that most instructional staff implement standards-based units of instruction consisting of well-structured lessons, but curricula in some schools or content areas lack appropriate rigor or alignment to state standards.	Monitors and assesses progress across all schools and content areas to ensure that all instructional staff implement effective and rigorous standards-based units of instruction consisting of well-structured lessons with measurable outcomes.	Empowers administrators to ensure all instructional staff collaboratively plan, adapt as needed, and implement standards-based units comprised of well-structured lessons aligned to state standards and local curricula. Continually monitors and assesses progress, and provides additional supports as needed. Models this practice for others.
I-B: Instruction	Does not ensure that instructional practices across schools and content areas reflect high expectations for teaching and learning, are engaging and motivating, or meet the diverse learning of all students; or establishes inappropriately low expectations for teaching and learning.	Supports instructional practices in some schools or content areas that reflect high expectations, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness; but allows lower expectations and/or insufficiently engaging instruction to persist in parts of the district.	Monitors and supports principals and instructional staff through observations and feedback to ensure that instructional practices in all settings reflect high expectations regarding content and quality of effort and work, engage all students, and are personalized to accommodate diverse learning styles, needs, interests, and levels of readiness.	Sets high expectations for the content and quality of instruction and empowers all administrators to do the same, such that instructional practices throughout the district are engaging, inclusive, and personalized to accommodate diverse learning needs of all students. Stays informed of new, evidenced-based instructional practices and provides resources and supports to implement them as needed. Monitors principals and instructional staff in support of these practices through observations and feedback.

Indicator Rubric for Superintendents

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-C: Assessment	Does not set expectations around or ensure the use of a variety of formal and informal assessment methods throughout the district.	Encourages most principals and administrators to facilitate practices that propel personnel to use a variety of formal and informal methods and measures student learning, growth, and understanding, but assessment use and analysis is inconsistent throughout the district.	Monitors and supports principals and instructional staff through observations and feedback to ensure that all principals and administrators facilitate practices that propel personnel to use a variety of formal and informal methods and assessments to measure student learning, growth, and understanding and make necessary adjustments to their practice when students are not learning.	Empowers teams of administrators and instructional staff to use a comprehensive system of informal and formal assessment methods to measure each student's learning, growth, and progress toward achieving state/local standards, and to use findings to adjust instructional practice and implement appropriate interventions and enhancements for students. Ensures alignment of assessments to content and grade level standards, and monitors administrators' efforts and successes in this area. Models this practice for others.
I-D: Evaluation	Does not supervise and evaluate administrators in alignment with state regulations or contract provisions, such that: - Administrators' goals are neither SMART nor aligned to school and/or district goals, and/or - Administrators rarely provide quality supervision and evaluation to other staff; and/or - Administrators are rarely, if ever, observed and provided with feedback on their own leadership practice.	Supervises and evaluates administrators in alignment with state regulations and contract provisions, but: - Some administrator goals may not be SMART or aligned to school and district priorities; and/or - Observations of and feedback to staff by other administrators is inconsistent or nonspecific; and/or - Observations of and feedback to administrators by the superintendent are inconsistent or nonspecific.	Provides effective and timely supervision and evaluation of all staff in alignment with state regulations and contract provisions, as evidenced by: - Support to all administrators in developing SMART goals aligned to school and district priorities; - Guidance, support and monitoring for all administrators to ensure they observe and provide useful feedback to faculty and staff; and - Frequent observations of and feedback to administrators on effective leadership practice.	Provides effective and timely supervision and evaluation of all staff in alignment with state regulations and contract provisions, as evidenced by: - Support to all administrators to develop and attain SMART goals aligned to school and district priorities, and sharing best practices and success with the district community; - Guidance, support and monitoring for all administrators to ensure they observe and provide useful feedback to faculty and staff; - Frequent observations of and feedback to administrators on effective leadership practice. Models this process through the superintendent's own evaluation process and goals.

Indicator Rubric for Superintendents

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
I-E: Data-Informed Decision Making	Gathers limited information on district strengths and weaknesses and writes district and annual action plans that lack data-informed goals.	Identifies multiple sources of evidence related to student strengths and areas for improvement, but these data are not comprehensive and/or analysis is insufficient, such that district and annual action plans lack focused or measurable goals.	Uses multiple sources of evidence related to student learning, including state, district, and school assessment results and growth data, to inform district goals and improve organizational performance, educator effectiveness, and student learning. Regularly monitors and shares progress with the community. Supports principals to align school improvement goals to district plans and goals.	Leads administrator teams in identifying and using multiple sources of evidence including state, district, and school assessment results and growth data, educator evaluation data, district culture and climate information, to assess and communicate the district's strengths and areas for improvement. Involves stakeholders in the creation of district improvement and annual action plans comprised of measurable, results-oriented goals, and empowers principals to develop and implement similarly robust and aligned school plans and goals. Regularly monitors and shares progress with the community.
I-F: Student Learning	Demonstrates expected impact on student learning based on multiple measures of student learning, growth, and achievement, including student progress on common assessments and statewide student growth measures where available. <i>There are no associated performance descriptors for the Student Learning Indicator. For administrators, evidence of impact on student learning based on multiple measures of student learning, growth, and achievement must be taken into account by the evaluator(s) when determining a performance rating for Standard I. Evaluators and educators should identify the most appropriate assessments of student learning and anticipated student learning gains associated with those measures when developing the Educator Plan. For superintendents and other district leaders, multiple measures of student learning might include (but should not be limited to) statewide assessments, assessments from curricular materials used in multiple schools, district-created common assessments, or others measures that provide information about student learning across the district.</i>			

April Reflection Standard I: In many ways, much of what the Superintendent does isn't directly focus on curriculum, instruction, and assessment; while at the same time everything the Superintendent does impacts curriculum, instruction, and assessment. The Assistant Superintendent and our two Curriculum Directors, in their work with our principals and Instructional Leaders, do an incredible job of ensuring that the educational program we provide students is at the core of our work with Monomoy.

STANDARD II: Management and Operations

Promotes the learning and growth of all students and the success of all staff by ensuring a safe, efficient, and effective learning environment, using resources to implement appropriate curriculum, staffing, and scheduling.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-A. Environment	Fails to establish plans, procedures, routines, and operational systems that address the safety, health, and emotional and social needs of students throughout the district, such that schools and other buildings are not generally clean, attractive, welcoming, or safe.	Oversees plans, procedures, routines, and operational systems that address the safety, health, and emotional and social needs of students, but allows for variation in implementation and/or quality across the district, such that not all students have equitable access to clean, safe, and supportive learning environments.	Develops and executes effective plans, procedures, routines, and operational systems to address a full range of safety, health, and emotional and social needs of students throughout the district, as evidenced by: - orderly and efficient student entry, dismissal, meals, class transitions, assemblies, and recess; - school and district buildings that are clean, attractive, welcoming, and safe; and - safe and supportive learning environments for all students.	Empowers all administrators to develop and execute effective plans, procedures, routines, and operational systems to address a full range of safety, health, and emotional and social needs of all students throughout the district, as evidenced by: - orderly and efficient student entry, dismissal, meals, class transitions, assemblies, and recess; - school and district buildings that are clean, attractive, welcoming, and safe; and - safe and supportive learning environments for all students. Assesses efficacy using feedback from students, staff, and families, and other data sources, and makes adjustments as necessary. Models this practice for others.

Indicator Rubric for Superintendents

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-B. Human Resources Management & Development	Does not implement any formal processes for the recruitment and hiring of faculty and staff, and/or fails to provide sufficient induction, development, or career growth supports to educators, as evidenced by an inability to reliably hire and retain educators that meet the learning needs of district students.	Oversees processes for recruitment, hiring, induction, development, and career growth, but systems are inadequately or inconsistently implemented throughout the district, and/or do not consistently promote the hiring, retention, and support of a diverse, effective educator workforce.	Monitors and supports the implementation of a cohesive approach to recruitment, hiring, induction, development, and career growth that promotes high-quality and effective practice, as evidenced by districtwide systems that support: - Hiring and retaining a diverse workforce; - Comprehensive induction supports for new educators; - Job-embedded professional development aligned with district goals; and - Distributed leadership opportunities to support educator career growth.	Ensures a districtwide system for recruiting, hiring, and retaining an effective and diverse workforce of administrators and educators who share the district's mission and meet the learning needs of all students, as evidenced by: - comprehensive induction supports for all new educators; - job-embedded professional learning that (a) reinforces district goals, (b) results in high-quality and effective practice; and - formalized distributed leadership and career growth opportunities. Empowers all administrators to implement these systems consistently.
II-C. Scheduling and Management Information Systems	Does not implement systems to ensure optimal use of time for teaching, learning, or collaboration, such that instructional time is inadequate and/or routinely disrupted, and administrators have limited to no opportunities to collaborate around meaningful practice.	Encourages the use of scheduling and management information systems that promote time for teaching and learning, but does not monitor efficacy throughout the district and/or allows for frequent schedule disruptions; provides inadequate time for administrators to collaborate around leadership practice.	Uses systems to ensure optimal use of time for teaching, learning, and collaboration, as evidenced by: - school schedules that maximize student access to quality instructional time and minimize school day disruptions; and - regular opportunities for administrators to collaborate.	Empowers administrators and teams to contribute to the design and monitoring of district systems that maximize access to quality instructional time for all students, and minimize disruptions and distractions for all school-level staff. Supports ongoing administrator collaboration within and across schools.

Indicator Rubric for Superintendents

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
II-D. Laws, Ethics and Policies	Demonstrates lack of awareness or consistent non-compliance with some or all state and federal laws and mandates, school committee policies, or collective bargaining agreements, and/or fails to adhere to ethical guidelines.	May know state and federal laws and mandates, school committee policies, and collective bargaining agreements, but inconsistently complies with some laws or policies, and/or ethical guidelines.	Understands and complies with state and federal laws and mandates, school committee policies, collective bargaining agreements, and ethical guidelines, and provides the resources and support to ensure district-wide compliance.	Provides the resources and support for all school personnel to understand and comply with state and federal laws and mandates, school committee policies, collective bargaining agreements, and ethical guidelines. Models this practice for others.
II-E. Fiscal Systems	Develops a budget that does not align with the district's goals or mismanages available resources. Does not communicate budget rationale or financial shortfalls to staff, community members, municipal stakeholders, or the school committee.	Develops a budget that loosely aligns with the district's vision, mission, and goals, and/or inconsistently manages expenditures and available resources. Does not effectively communicate budget rationale to staff, community members, municipal stakeholders, and the school committee.	Develops a budget that supports the district's vision, mission, and goals; allocates and manages expenditures consistent with district/school-level goals and available resources; and effectively communicates budget rationale to staff, community members, municipal stakeholders, and the school committee. Provides regular updates on implementation of the budget.	Leads the administrator team to develop a district budget aligned with the district's vision, mission, and goals that addresses the needs of all students. Allocates and manages expenditures consistent with district/school-level goals, and seeks alternate funding sources as needed. Proactively communicates budget rationale to staff, community members, municipal stakeholders, and the school committee. Provides regular updates on implementation of the budget.

April Reflection Standard II: This year has demanded great attention of the Superintendent in the area of Management and Operations. Again, all of my work in this area is supported by the best Business Manager in the state. Budgetary forces largely out of our control are making it increasingly difficult for our towns to fund level service programming, with strategic enhancements. Significant time and thought had to go into the development of a budget that had enrollment-driven staff reductions, while maintaining level-services and even including some strategic enhancements in our educational program. Concurrent to this is a middle school renovation project that is not currently underway in a building that is occupied, so significant phasing planning was needed to protect all occupants and minimize disruption to the educational program. Add to this the need to bring forward to annual Town Meetings the Phase 2 part of the middle school renovation, the roof project. And, within the Human Resources part of this standard, there was the need to support the School Committee in the process of hiring a new Superintendent of Schools.

STANDARD III: Family and Community Engagement

Promotes the learning and growth of all students and the success of all staff through effective partnerships with families, community organizations, and other stakeholders that support the mission of the school and district.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
III-A. Engagement	Does little to welcome families as members of the district, classroom or school community, or tolerates an environment that is unwelcoming to some families.	Invites families to participate in the classroom and school community, but efforts are limited or insufficient, leading to limited family involvement throughout the district.	Promotes, monitors and supports comprehensive, culturally responsive and collaborative engagement practices that welcome and encourage every family to actively participate in the classroom and school community, and engages community stakeholders to contribute to the classroom, school, and community's effectiveness.	Ensures that all personnel to use culturally responsive and collaborative practices that engage all families to contribute to district, classroom, school, and community effectiveness, including but not limited to families with limited access to technology, and families whose home language is not English. Actively engages stakeholders from all segments of the community, including residents, municipal officials, and business leaders, in furthering the mission of the school and the district. Models this practice for others.
III-B. Sharing Responsibility	Does not ensure that administrators are identifying student learning and development needs and working with families to address them.	Encourages administrators to work with families to address students struggling academically or behaviorally, but does not consistently monitor these activities to ensure that student needs are being met, either within or outside of schools.	Monitors adherence to district-wide policies and practices that promote continuous collaboration with families to support student learning and development both at home and at school, as evidenced by: - the collaborative identification of each student's academic, social, emotional, and behavioral needs; and - connecting families to the necessary resources and services within the school and the community to meet students' learning needs.	Empowers all administrators to regularly collaborate with families to address each student's academic, social, emotional, and behavioral needs, and to access as needed necessary services within and outside of schools to address those needs. Monitors these processes to ensure all student needs are being met. Models this practice for others.

Indicator Rubric for Superintendents

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
III-C. Communication	Does not set clear expectations for or provide support to administrators regarding regular or culturally sensitive communication with families, and/or allows culturally insensitive, inappropriate, or disrespectful communications with families to occur. District communication regarding student learning and performance occurs primarily through school report cards.	May set expectations regarding regular, two-way, culturally proficient communications with families, but allows occasional communications that are culturally insensitive to some families' home language, culture, and values. District communication primarily occurs through school newsletters and other one-way media.	Engages in regular, two-way, culturally proficient communication with families and community stakeholders about student learning and performance, that is provided in multiple formats and reflects understanding of and respect for different families' home languages, culture, and values.	Supports and empowers all administrators to engage in regular, two-way, culturally responsive communications with families about student learning and performance. District-wide communications with families are provided in multiple formats and respect and affirm different families' home languages, culture, and values.
III-D. Family Concerns	Does not address most family concerns in a timely or effective manner, fails to provide systems or supports for administrators to do the same, and/or allows responses to be inconsistent or insufficient. Resolutions are often not in the best interest of students.	Ensures that most family concerns are addressed as they arise, but responsiveness is inconsistent across the district. Supports administrators to reach solutions to family concerns, but may not ensure equitable resolutions that are in the best interest of students.	Addresses family concerns in an equitable, effective, and efficient manner, and supports administrators to seek equitable resolutions to both academic and non-academic concerns that (a) reflect relevant information from all parties including families, faculty, and staff, and (b) are in the best interest of students.	Ensures that all family concerns are addressed in a timely and effective manner throughout the district; empowers administrators to proactively respond as academic or non-academic concerns arise; and promotes collaborative problem solving processes informed by relevant input from all families, faculty, and staff that result in equitable solutions that are in the best interest of students. Models this practice for others.

April Reflection Standard III: Within the standard on Family and Community Engagement, some of the Superintendent's efforts have focused on his ongoing work and outreach to some of our most vulnerable populations. Towards this end, I've been pleased the group that I've been working with expand this year, through a partnership with the YMCA Cape Cod and its Y Achievers program. I am very grateful to have the support of our Community Engagement Coordinator and all of her work in helping me with communication out to families, but also her unsung work in ensuring our website and our means of reaching families stands as an exemplar for all other school districts.

STANDARD IV: Professional Culture

Promotes success for all students by nurturing and sustaining a school culture of reflective practice, high expectations, and continuous learning for staff.

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-A. Commitment to High Standards	Does not encourage high standards of teaching and learning or high expectations for achievement among administrators, as evidenced by: 1. a failure to develop or articulate the district's mission or core values; and 2. an inability or unwillingness to lead administrator leadership meetings that inform school and district matters.	May articulate high standards for teaching and learning, but expectations are inconsistently applied throughout the district, as evidenced by: 1. Mission and core values are present but may not reflect district-wide buy-in, or are rarely used to inform decision-making. 2. Meetings: Leads administrator leadership meetings that address matters of consequence but may not result in meaningful decision-making.	Fosters a shared commitment to high standards of teaching and learning with high expectations for achievement for all, including: 1. Mission and core values: Develops, promotes, and secures staff commitment to core values that guide the development of a succinct, results-oriented mission statement and ongoing decision-making. 2. Meetings: Plans and leads well-run and engaging meetings that have clear purpose, focus on matters of consequence, and engage participants in a thoughtful and productive series of conversations and deliberations about important school matters.	Established a district-wide commitment to high standards of teaching and learning with high expectations for achievement for all, including: 1. Mission and core values: Collaborates with educators and community members to develop, secure and/or promote core values and an aligned mission, and to use them to guide decision making. 2. Meetings: Empowers administrators to share responsibility for leading team meetings that address important district matters, and foster collaborative learning and problem-solving around instructional leadership issues. Models this practice for others.

Indicator Rubric for Superintendents

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-B. Cultural Proficiency	Develops and implements culturally insensitive or inappropriate policies and practices, does not support administrators and staff in building cultural proficiency, and/or fosters a culture that minimizes the importance of individual differences.	Takes pride in having a diverse administration, faculty and/or student body, but some policies and practices are not culturally responsive; and/or provides limited resources for administrators to support the development of culturally responsive learning environments and school culture that affirms individual differences.	Ensures that policies and practices enable staff members and students to interact effectively in a culturally diverse environment in which students' backgrounds, identities, strengths, and challenges are respected, as evidenced by the sufficient provision of guidance, supports, and resources to all schools to promote culturally responsive learning environments and school cultures that affirm individual differences of both students and staff.	Leads stakeholders to develop and implement culturally responsive policies and practices that acknowledge the diverse backgrounds, identities, strengths, and challenges of administrators, students and staff. Empowers administrators with time, resources, and supports to build culturally responsive learning environments and collaborates with community members to create a culture that affirms individual differences. Models this practice for others.
IV-C. Communications	Demonstrates ineffectual interpersonal, written, or verbal communication skills at times, such that staff, families and community members, and/or the school committee lack accurate or sufficient information.	Demonstrates adequate interpersonal, written, and verbal communication skills, but outreach to staff, families and community members, and/or the school committee may be inconsistent or unclear.	Demonstrates strong interpersonal, written, and verbal communication skills, as evidenced by regular and informative outreach to staff, families and community members, and the school committee in a manner that advances the work of the district. Regularly seeks and considers feedback in decision-making.	Utilizes and models strong context- and audience-specific interpersonal, written, and verbal communication skills. Actively seeks and incorporates feedback into decision-making and in communicating rationale for the decisions to staff, family, community members and school committee.

Indicator Rubric for Superintendents

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-D. Continuous Learning	Accepts the practice of administrators working largely in isolation, without consideration of data and best practices. Does not reflect on leadership practice or demonstrate new ways of thinking about administration and leadership.	Encourages administrators and teams to reflect on the effectiveness of instruction and student learning and use data and best practices to adapt practice, but does not monitor administrators in these practices to ensure consistency or efficacy. Occasionally reflects on their own leadership practice.	Develops and nurtures a culture in which staff members are reflective about their practice and use student data, current research, best practices and theory to continuously adapt instruction and achieve improved results, as evidenced by: - Supporting regular opportunities for administrators and teams to reflect on and collaborate around the effectiveness of a wide range of practices related to instruction and student learning, and - Engaging in their own continuous learning to improve leadership practice. Models these behaviors in their own practice.	Develops, nurtures, and models a culture in which all staff members are reflective about their practice and use student data, current research, best practices and theory to continuously adapt instruction and achieve improved results, as evidenced by: - Empowering all administrators to collaborate and share knowledge and skills of best practices that improve student learning within their own buildings, and - Regularly reflecting on and improving their own leadership practice in order to develop new approaches to improve overall district effectiveness.
IV-E. Shared Vision	Does not engage stakeholders in the creation of or commitment to a shared educational vision, such that the vision is not one in which all students will be prepared to succeed in postsecondary education and become responsible citizens and community contributors.	Engages some administrators, staff, students, families, and community members in developing and committing to a shared educational vision focused on student preparation for college and career readiness, civic engagement, responsible citizenship, and community contributions, but stakeholder engagement is limited and/or the vision is unrepresentative of the district community.	Continuously engages all stakeholders in the creation of (or commitment to) a shared educational vision focused on student preparation for college and career readiness, civic engagement, community contributions, and responsible citizenship.¹	Leads administrators, staff, students of all ages, families, and community members to develop and internalize a shared educational vision around student preparation for college and careers, civic engagement, community contributions, and responsible citizenship. Ensures alignment of school and district goals to this vision. Models this practice for others.

¹ The original Indicator language is modified in this rubric to reflect a more expansive definition of student success that is inclusive of college and career readiness. This definition is reflected in the other model rubrics as well as Massachusetts policies and initiatives to improve outcomes for all students.

Indicator Rubric for Superintendents

	Unsatisfactory	Needs Improvement	Proficient	Exemplary
IV-F. Managing Conflict	Does not respond to disagreement or dissent and/or does not address conflict in a solutions-oriented or respectful manner. Does not attempt or fails to build consensus within the district and school communities.	Responds respectfully to most cases of disagreement and dissent, but employs only a limited range of strategies to resolve conflict and build consensus within the district and school communities, with varying degrees of success.	Employs strategies for responding to disagreement and dissent, constructively resolving conflict, and building consensus throughout district and school communities, while maintaining a commitment to decisions that are in the best interest of all students.	Models a variety of strategies for responding respectfully and effectively to disagreement and dissent, and resolves conflicts in a constructive manner such that all parties are able to move forward productively. Regularly strives to achieve consensus within the district and school communities, while maintaining a commitment to decisions that are in the best interest of all students. Empowers and supports administrators to use these approaches in their own leadership.

April Reflection Standard IV: While this is my last year, heading into retirement, I head out continuing to be a life-long learner. I had the option to take the 15-hour SEI course for administrators (something Superintendents don't need for licensure). I elected to take the 45-hour course for teacher and thoroughly enjoyed the experience. I've also participated in both the fall and spring Monomoy staff book clubs (and accompanying PD). In terms of staff communication, I do hope that the implementation of the monthly Staff Shout Outs has helped some of our staff see that their work is recognized by others (parents and colleagues) and celebrated by all. I've also sent out transparent communication to staff throughout this challenging budget process.



Monomoy Regional School Committee 2025-2026 Meeting Schedule

Date	Time	Anticipated Topics
July 10, 2025	6:30 PM	
July 24, 2025	6:00 PM	MRSC Workshop
August 14, 2025	6:30 PM	School Handbook & Improvement Plan
September 4, 2025	6:30 PM	MRSC Workshop
September 11, 2025	6:30 PM	School Committee & Superintendent Goals
September 25, 2025	6:30 PM	Schedule of FY27 Budget Dates 25-26 SC & Superintendent Goals Vote
October 9, 2025	6:30 PM	Preliminary FY26 Budget Discussions
October 23, 2025	6:30 PM	
November 6, 2025	6:30 PM	
November 13, 2025	6:30 PM	FY27 Budget Workshop
November 20, 2025	6:30 PM	
December 11, 2025	6:30 PM	Draft FY27 Budget Presentation
December 17, 2025	5:00 PM	Superintendent Finalist Interviews
December 22, 2025	5:30 PM	New Superintendent Vote
January 15, 2026	6:30 PM	FY27 Budget Discussion
January 29, 2026	6:30 PM	Academic Excellence Award /FY26 Budget Discussion
February 12, 2026	7:00 PM	Public Hearing FY26 Budget
February 26, 2026	6:30 PM	2026 - 2027 School Calendar
March 12, 2026	6:30 PM	FY27 Budget Vote
March 26, 2026	6:30 PM	School Choice Vote
April 9, 2026	6:30 PM	Curriculum Updates
April 30, 2026	6:30 PM	Superintendent Evaluation First Reading
May 14, 2026	6:30 PM	Superintendent Evaluation Vote
May 28, 2026	6:30 PM	Elect New Chair / Vice Chair
June 11, 2026	6:30 PM	
June 25, 2026	6:30 PM	

Monomoy Regional School District

Scott Carpenter, Ed.D.
Superintendent

Michael MacMillan
Business Manager

Melissa Maguire
Director of Student Services



Robin A. Millen, Ed.D.
Assistant Superintendent of
Curriculum, Instruction and Assessment

Paul G. Donlan
Treasurer

To: MONOMOY REGIONAL SCHOOL COMMITTEE
From: Michael MacMillan
Date: 4/6/2026
Re: MRMS Construction Project Borrowing – Second Sale of Bond Anticipation Notes

MOTION:

To approve the various votes prepared by Bond Counsel for the District and presented to the meeting, which votes approve the sale of four million, four hundred and six thousand, one hundred and five dollars of General Obligation Bond Anticipation Notes to the successful bidder, establish the terms of the notes and make other determinations as required by the General Laws, federal tax law and federal securities law.

VOTES

To approve the sale of \$4,406,105 4.00 percent General Obligation Bond Anticipation Notes (the "Notes") of the District dated April 30, 2026 and payable September 18, 2026 to Huntington Securities, Inc. at par and accrued interest, if any, plus a premium of \$19,298.74.

Further: that in connection with the marketing and sale of the Notes, the preparation and distribution of a Notice of Sale and Preliminary Official Statement dated March 24, 2026 and a final Official Statement dated April 1, 2026, each in such form as may be approved by the District Treasurer, be and hereby are ratified, confirmed, approved and adopted.

Further: that the District Treasurer and the Chair of the Committee be, and hereby are, authorized to execute and deliver a significant events disclosure undertaking in compliance with SEC Rule 15c2-12 in such form as may be approved by bond counsel to the District, which undertaking shall be incorporated by reference in the Notes for the benefit of the holders of the Notes from time to time.

Further: that we authorize and direct the District Treasurer to establish post issuance federal tax compliance procedures and continuing disclosure procedures in such forms as the District Treasurer and bond counsel deem sufficient, or if such procedures are currently in place, to review and update said procedures, in order to monitor and maintain the tax-exempt status of the Notes and to comply with relevant securities laws.

Further: that any certificates or documents relating to the Notes (collectively, the "Documents"), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document; delivery of an executed counterpart of a signature page to a Document by electronic mail in a ".pdf" file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document; and electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

Further: that each member of the Committee, the District Secretary and the District Treasurer be and hereby are, authorized to take any and all such actions, and execute and deliver such certificates, receipts or other documents as may be determined by them, or any of them, to be necessary or convenient to carry into effect the provisions of the foregoing votes.

BACKGROUND

The District has been approved to borrow funds of up to \$11,507,030 to fund the siding and window replacement project at the Monomoy Regional Middle School. This approval was given at previous School Committee meetings, at Chatham and Harwich Town Meetings, and through Town of Harwich ballot vote.

The District has already borrowed \$5,000,000 (five million dollars) through a 'Bond Anticipation Note' for this project and expenditure has been ongoing. Now that construction has started at the Middle School the rate of expenditure is expected to increase significantly.

Working with the District's Financial Advisors, Hilltop Securities, we have determined that further short term loan of \$4,406,105 to cover the District's costs through until the end of construction (around September) is the most fiscally prudent approach. This approach will ensure that the districts' costs are funded while ensuring that the district doesn't borrow more than is required before the actual total cost of the project is known.

The amount to be borrowed was based on the total projected project costs (including contingency) at March 6, 2026 (see attached).

A Bond Anticipation Note is type of short-term loan used by governments, cities, and school districts to finance a large project, before full, long-term funding is in place

The decision on when to issue the long term debt for this project will be based on a number of factors, including interest rates, the progress with the construction project, and the progress with the roofing project. It may be possible for the district to combine the borrowing for the siding project with that for the roof project to maximize value for the district.

Hilltop Securities conducted the bid process for the BAN on April 1, 2026 on behalf of the district. The low bidder was Huntington Securities, Inc. who bid with rate of 4.00%.

The wording of the School Committee vote was provided by the district's Bond Counsel, Richard Manley, and paralegal Diane Pagliuca, of Troutman Pepper Locke.

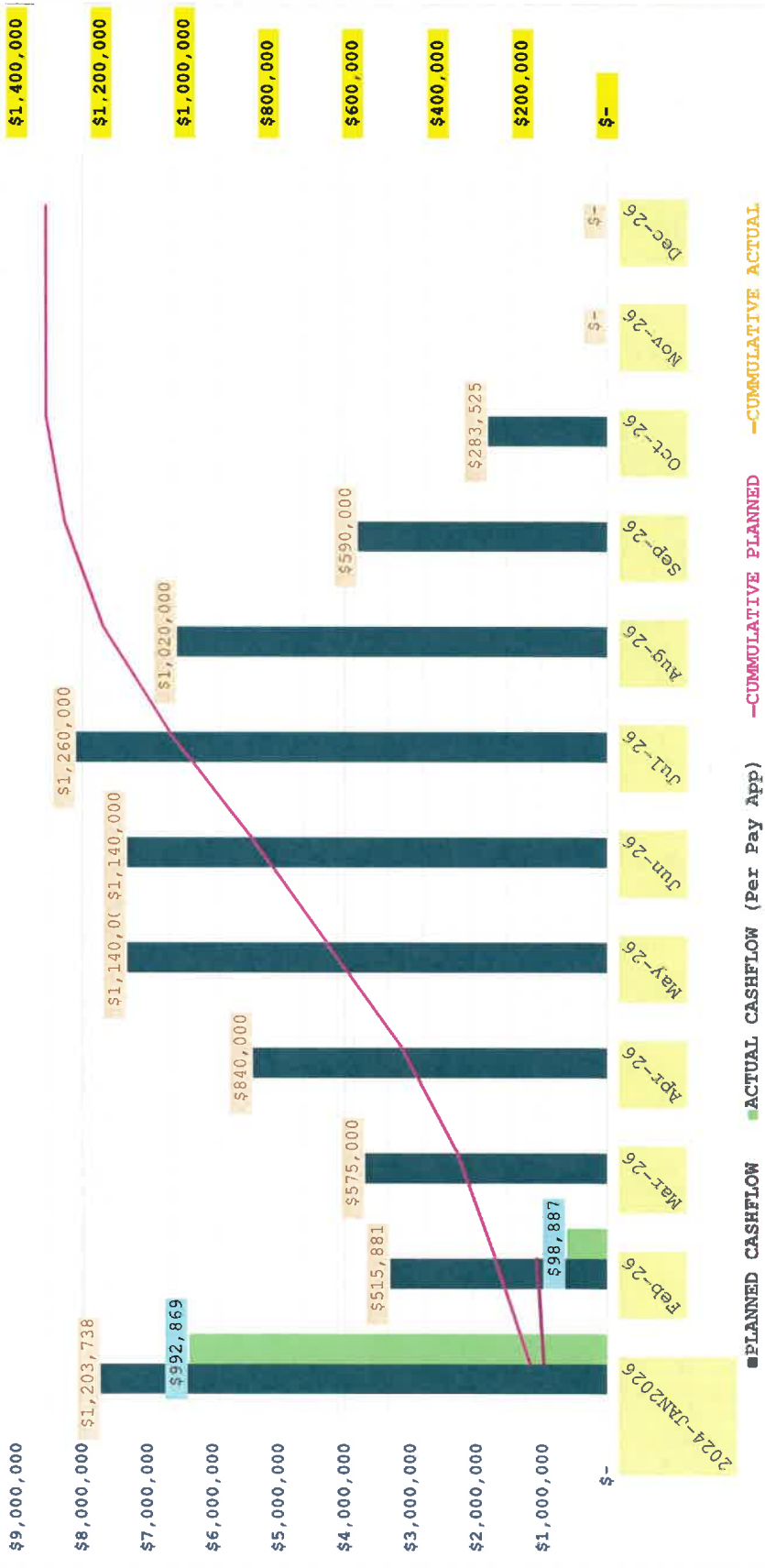
Once this vote has been approved several other documents must be signed by the School Committee Chair, the Secretary, and the Treasurer to ensure that the district complies with all state and federal laws and regulations. The documents are attached for your information.

Michael MacMillan, School Business Manager

MONOMOY REGIONAL SCHOOL DISTRICT - SIDING & WINDOW REPLACEMENT PROJECT - CASH FLOW

MONTH	2024-JAN-2026	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	TOTAL
PLANNED CASHFLOW	\$ 1,203,738	\$ 515,881	\$ 575,000	\$ 840,000	\$ 1,140,000	\$ 1,140,000	\$ 1,260,000	\$ 1,020,000	\$ 590,000	\$ 283,525	\$ -	\$ -	\$ 8,568,144.29
ACTUAL CASHFLOW (Per Pay App)	\$ 992,869	\$ 98,887											\$ 1,091,756.18
CUMMULATIVE PLANNED	\$ 1,203,738	\$ 1,719,619	\$ 2,294,619	\$ 3,134,619	\$ 4,274,619	\$ 5,414,619	\$ 6,674,619	\$ 7,694,619	\$ 8,284,619	\$ 8,568,144	\$ 8,568,144	\$ 8,568,144	
CUMMULATIVE ACTUAL	\$ 992,869	\$ 1,091,756											\$ 9,406,104.29

TOTAL PROJECT BUDGET CASHFLOW



Diane M. Pagliuca
Paralegal
D 617.239.0484
diane.pagliuca@troutman.com

April 6, 2026

VIA EMAIL

Michael MacMillan, Business Manager
Monomoy Regional School District
425 Crowell Road, 2nd Floor
Chatham, Massachusetts 02633

Re: \$4,406,105 General Obligation Bond Anticipation Notes
Dated and Closing: April 30, 2026

Dear Michael:

Attached is the signature page to the Note (one copy) followed by two copies of each signature page to the remaining closing documents listed below. Please ensure that each of the attached signature pages are **printed single-sided, signed by hand and sealed** as follows:

1. **Note** – to be signed by the District Treasurer and the Chair of the Regional School District School Committee (the “Committee”) and **sealed** with the District seal.
2. **Vote of the Committee** – to be passed at the April 9, 2026 meeting of the Committee and signed by the District Secretary.
3. **Signature, No Litigation and Official Statement Certificate** – to be signed by the District Treasurer, the Chair of the Committee and the District Secretary, and **sealed** with the District seal.
4. **Tax Certificate** – to be signed by the District Treasurer and the Chair of the Committee. Prior to execution, such signatories should read this document carefully to confirm that the facts stated therein are correct. If any facts are incorrect, or if any statements made are unclear, please call me or Rick Manley at (617) 239-0384 to discuss any changes that may need to be made. Please note that this document will be reviewed by our tax partner prior to the closing and such partner may suggest certain changes be made to the

document. If material changes are made, we will send you copies of any such changes.

5. **IRS Form 8038-G** – to be signed by the District Treasurer. (We will take care of filing one on behalf of the District with the IRS.)
6. **Significant Events Disclosure Certificate** – to be signed by the District Treasurer and the Chair of the Committee.

Once executed, please **email a scanned PDF of the executed signature pages to me as soon as possible**. After you have done so, please return all of the executed signature pages via FedEx using the enclosed mailing label so that I receive them no later than **Monday, April 20, 2026**. Please do not hesitate to contact me with any questions.

Best regards,

/s/ Diane M. Pagliuca

Diane M. Pagliuca

Enclosures

cc: Richard A. Manley Jr., Esq.
Hilltop Securities Inc.

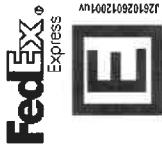
ORIGIN ID:HYAA (617) 239-0484
MICHAEL MACMILLAN, BUSINESS MANAGER
MONOMOY REGIONAL SCHOOL DISTRICT
425 CROWELL ROAD, 2ND FLOOR
CHATHAM, MA 02633
UNITED STATES US

SHIP DATE: 06APR26
ACTWGT: 1.00 LB
CAD: 109453565/INET4635
BILL SENDER

TO **DIANE PAGLIUCA, PARALEGAL**
TROUTMAN PEPPER LOCKE LLP
111 HUNTINGTON AVE

BOSTON MA 02199

(617) 239-0484 REF: 609868-000001
INV: PO: DEPT:



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TUE - 07 APR 10:30A
PRIORITY OVERNIGHT

TRK# **8703 5879 3432**

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After printing this label:
1. Fold the printed page along the horizontal line.
2. Place label in shipping pouch and affix it to your shipment.

CONSIGNEE COPY - PLEASE PLACE IN FRONT OF POUCH

Use of this system constitutes your agreement to the service conditions in the current FedEx Service Guide, available on fedex.com. FedEx will not be responsible for any claim in excess of \$100 per package, whether the result of loss, damage, delay, non-delivery, misdelivery, or misinformation, unless you declare a higher value, pay an additional charge, document your actual loss and file a timely claim. Limitations found in the current FedEx Service Guide apply. Your right to recover from FedEx for any loss, including intrinsic value of the package, loss of sales, income interest, profit, attorney's fees, costs, and other forms of damage whether direct, incidental, consequential, or special is limited to the greater of \$100 or the authorized declared value. Recovery cannot exceed actual documented loss. Maximum for items of extraordinary value is \$1,000, e.g. jewelry, precious metals, negotiable instruments and other items listed in our Service Guide. Written claims must be filed within strict time limits, see current FedEx Service Guide.

Registered
Number 1

Registered
\$4,406,105

United States of America

The Commonwealth of Massachusetts

MONOMOY REGIONAL SCHOOL DISTRICT

GENERAL OBLIGATION
BOND ANTICIPATION NOTE

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>Registration and Original Issue Date</u>	<u>CUSIP</u>
4.00%	September 18, 2026	April 30, 2026	609845 BW1
PRINCIPAL AMOUNT:	FOUR MILLION FOUR HUNDRED SIX THOUSAND ONE HUNDRED FIVE DOLLARS		
REGISTERED OWNER:	CEDE & CO.		
REGISTRAR AND PAYING AGENT:	U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION		

The Monomoy Regional School District, Massachusetts (the "District") for value received, promises to pay to the Registered Owner of this note or registered assigns the Principal Amount specified above in lawful money of the United States of America on the Maturity Date upon presentation and surrender hereof, with interest (calculated on the basis of a 30-day month and a 360-day year) at the Interest Rate per annum, payable on the Maturity Date. This note will bear interest from the Original Issue Date.

This note certificate is the only instrument representing an issue of \$4,406,105 aggregate principal amount of notes issued by the District pursuant to Chapter 71 of the General Laws as amended in anticipation of bonds authorized for school improvement purposes.

The notes are general obligations of the District and the full faith and credit of the District is pledged for the payment of principal of and interest on the notes as the same shall become due.

The notes are being issued by means of a book entry system, with a note certificate immobilized at The Depository Trust Company, New York, New York ("DTC") evidencing ownership of the notes in principal amounts of \$1,000 or integral multiples thereof, except for one principal amount of \$1,105, and with transfers of beneficial ownership effected on the records of DTC and its participants pursuant to rules and procedures established by DTC. Note certificates are not available for distribution to the public. The principal of and interest on this note are payable by U.S. Bank Trust Company, National Association, or its successor as paying agent (the "Paying

Agent”) for the District, in immediately available funds to the Registered Owner of this note, as nominee of DTC. Transfer of principal and interest payments to participants of DTC is the responsibility of DTC; transfer of principal and interest payments to beneficial owners by participants of DTC will be the responsibility of such participants and other nominees of beneficial owners. The District is not responsible or liable for maintaining, supervising or reviewing the records maintained by DTC, its participants or persons acting through such participants.

Unless this note certificate is presented by an authorized representative of The Depository Trust Company to the Paying Agent for registration of transfer, exchange or payment, and any note certificate issued is registered in the name of Cede & Co. or such other name as requested by an authorized representative of The Depository Trust Company and any payment is made to Cede & Co., ANY TRANSFER, PLEDGE OR OTHER USE HEREOF FOR VALUE OR OTHERWISE BY OR TO ANY PERSON IS WRONGFUL since the registered owner hereof, Cede & Co., has an interest herein.

In the event that (a) DTC determines not to continue to act as securities depository for the notes or (b) the District determines that continuation of the book entry system of evidence and transfer of ownership would adversely affect the interests of the beneficial owners of the notes, the District will discontinue the book entry system with DTC. If the District fails to identify another qualified securities depository to replace DTC, the Paying Agent will authenticate and deliver replacement notes in the form of fully registered certificates.

This note is transferable only upon the registration books kept by the Paying Agent as registrar, but only in a manner which will maintain immobilization of note certificates at one or more securities depositories. This note may not be transferred or exchanged in a manner which would involve the delivery of note certificates to the beneficial owners unless the book entry system has been discontinued by the District in accordance with the terms of this note, in which case replacement notes may be issued in accordance with law and such procedures as the District shall deem appropriate.

The District hereby covenants that it will take all lawful action necessary to comply with all requirements of the Internal Revenue Code of 1986, as amended, that must be satisfied subsequent to the issuance of the notes in order that interest on the notes be and continue to be excluded from gross income for federal income tax purposes and it will refrain from taking any action that would cause interest on the notes to become included in gross income for federal income tax purposes.

In connection with the offering of the notes the District has executed a Significant Events Disclosure Certificate dated as of the date hereof (as it may be amended from time to time, the “Certificate”). The District hereby covenants to comply with the provisions of the Certificate, and reference is made to the Certificate for a description of the nature and extent of the obligations of

the District and the rights of the owners of the notes under the Certificate. The Certificate is described in the Official Statement relating to the notes. A copy of the Certificate is available from the District upon request.

MONOMOY REGIONAL SCHOOL DISTRICT,
MASSACHUSETTS

By: _____
District Treasurer

Countersigned:

Chair, Regional School
District School Committee

(District Seal)

LEGAL OPINION

The following opinion is based on facts and the law existing on the date of original delivery of the notes described therein.

TROUTMAN PEPPER LOCKE LLP
111 Huntington Avenue
Boston, Massachusetts

Jakob Voelker, Treasurer
Monomoy Regional School District
Chatham, Massachusetts

\$4,406,105
Monomoy Regional School District, Massachusetts
General Obligation Bond Anticipation Notes

We have acted as bond counsel to the Monomoy Regional School District, Massachusetts (the "District") in connection with the issuance by the District of the above-referenced notes (the "Notes") dated April 30, 2026 and payable September 18, 2026. In such capacity, we have examined the law and such certified proceedings and other papers as we have deemed necessary to render this opinion.

As to questions of fact material to our opinion we have relied upon representations and covenants of the District contained in the certified proceedings and other certifications of public officials furnished to us, without undertaking to verify the same by independent investigation.

Based on our examination, we are of the opinion, under existing law, as follows:

1. The Notes are valid and binding general obligations of the District, a body corporate and politic, organized and existing under and pursuant to Chapter 71 of the Massachusetts General Laws, as amended and supplemented ("Chapter 71"), and an Agreement, as amended (the "District Agreement"), between the Towns of Chatham and Harwich, Massachusetts (together, the "Member Towns").

2. The District Agreement, as amended, made under the applicable provisions of Chapter 71, provides for the annual apportionment between the Member Towns of the budgeted expenses of the District for the ensuing year, including principal and interest payments on the Notes (to the extent such expenses are not paid from other sources).

3. Under existing law, including Section 16B of Chapter 71, the amounts so apportioned to and appropriated by the Member Towns shall be paid by each Member Town to the District in accordance with the terms of the District Agreement.

4. To pay amounts apportioned to and appropriated by the Member Towns to pay their respective shares of the principal of and interest on the Notes, each Member Town has the power to levy ad valorem taxes upon all the property situated within its respective territorial limits and taxable by it, without limitation as to rate or amount, except as provided under Chapter 44, Section 20 of the General Laws, with respect to the Town of Harwich, and subject to the limit imposed by Chapter 59, Section 21C of the General Laws with respect to the Town of Chatham.

5. Interest on the Notes is excluded from the gross income of the owners of the Notes for federal income tax purposes. In addition, interest on the Notes is not a specific preference item for purposes of the federal individual alternative minimum tax. However, interest on the Notes will be included in the "adjusted financial statement income" of certain corporations that are subject to the alternative minimum tax under Section 55 of the Internal Revenue Code of 1986 (the "Code"). In rendering the opinions set forth in this paragraph, we have assumed compliance by the District with all requirements of the Code that must be satisfied subsequent to the issuance of the Notes in order that interest thereon be, and continue to be, excluded from gross income for federal income tax purposes. The District has covenanted to comply with all such requirements. Failure by the District to comply with certain of such requirements may cause interest on the Notes to become included in gross income for federal income tax purposes retroactive to the date of issuance of the Notes. Except as expressed in paragraph 7 below, we express no opinion regarding any other federal tax consequences arising with respect to the Notes.

6. Interest on the Notes is exempt from Massachusetts personal income taxes and the Notes are exempt from Massachusetts personal property taxes. We express no opinion regarding any other Massachusetts tax consequences arising with respect to the Notes or any tax consequences arising with respect to the Notes under the laws of any state other than Massachusetts.

7. The Note is a qualified tax-exempt obligation within the meaning of Section 265(b)(3) of the Code.

This opinion is expressed as of the date hereof, and we neither assume nor undertake any obligation to update, revise, supplement or restate this opinion to reflect any action taken or omitted, or any facts or circumstances or changes in law or in the interpretation thereof, that may hereafter arise or occur, or for any other reason.

The rights of the holders of the Notes and the enforceability of the Notes may be subject to bankruptcy, insolvency, reorganization, moratorium and other similar laws affecting creditors' rights heretofore or hereafter enacted to the extent constitutionally applicable, and their enforcement may also be subject to the exercise of judicial discretion in appropriate cases.

/s/ TROUTMAN PEPPER LOCKE LLP

VOTE OF THE MONOMOY
REGIONAL SCHOOL DISTRICT SCHOOL COMMITTEE

I, the District Secretary of the Regional School District School Committee (the "Committee") of the Monomoy Regional School District, Massachusetts (the "District"), certify that at a meeting of the Committee held April 9, 2026, of which meeting all members of the Committee were duly notified and at which a quorum was present, the following votes were unanimously passed, all of which appear upon the official record of the Committee in my custody:

Voted: to approve the sale of \$4,406,105 4.00 percent General Obligation Bond Anticipation Notes (the "Notes") of the District dated April 30, 2026 and payable September 18, 2026 to Huntington Securities, Inc. at par and accrued interest, if any, plus a premium of \$19,298.74.

Further Voted: that in connection with the marketing and sale of the Notes, the preparation and distribution of a Notice of Sale and Preliminary Official Statement dated March 24, 2026 and a final Official Statement dated April 1, 2026, each in such form as may be approved by the District Treasurer, be and hereby are ratified, confirmed, approved and adopted.

Further Voted: that the District Treasurer and the Chair of the Committee be, and hereby are, authorized to execute and deliver a significant events disclosure undertaking in compliance with SEC Rule 15c2-12 in such form as may be approved by bond counsel to the District, which undertaking shall be incorporated by reference in the Notes for the benefit of the holders of the Notes from time to time.

Further Voted: that we authorize and direct the District Treasurer to establish post issuance federal tax compliance procedures and continuing disclosure procedures in such forms as the District Treasurer and bond counsel deem sufficient, or if such procedures are currently in place, to review and update said procedures, in order to monitor and maintain the tax-exempt status of the Notes and to comply with relevant securities laws.

Further Voted: that any certificates or documents relating to the Notes (collectively, the "Documents"), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document; delivery of an executed counterpart of a signature page to a Document by electronic mail in a ".pdf" file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document; and electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

Further Voted: that each member of the Committee, the District Secretary and the District Treasurer be and hereby are, authorized to take any and all such actions, and execute and deliver such certificates, receipts or other documents as may be determined by them, or any of them, to be necessary or convenient to carry into effect the provisions of the foregoing votes.

I further certify that the votes were taken at a meeting open to the public, that no vote was taken by secret ballot, that a notice stating the place, date, time and agenda for the meeting (which agenda included the adoption of the above votes) was posted on the District's website as an approved alternative method of notice approved by the Massachusetts Attorney General as set forth in 940 CMR 29.03(4), at least 48 hours, not including Saturdays, Sundays and legal holidays, prior to the time of the meeting and remained so posted at the time of the meeting, that no deliberations or decision in connection with the sale of the Notes were taken in executive session, all in accordance with G.L. c.30A, §§18-25, as amended.

Dated: April 9, 2026

District Secretary

251187293v1

(Please Note: The following statements are an essential part of the permanent record. Read them carefully before signing this certificate. Advise Troutman Pepper Locke LLP of any inaccuracy.)

Monomoy Regional School District, Massachusetts
\$4,406,105 General Obligation Bond Anticipation Notes
Dated April 30, 2026

SIGNATURE, NO LITIGATION AND OFFICIAL STATEMENT CERTIFICATE

A. Certificate of Authorized Officers. We, the District Treasurer and the Chair (the "Chair") of the Regional School District School Committee (the "Committee") of the Monomoy Regional School District, Massachusetts (the "District"), certify that we have signed the \$4,406,105 4.00 percent General Obligation Bond Anticipation Notes (the "Notes") of the District dated April 30, 2026 and payable September 18, 2026. A book entry system is being used to evidence ownership and transfer of the Notes on the records of The Depository Trust Company ("DTC"). The Notes are issued in the form of a single note certificate for the full principal amount, registered in the name of "CEDE & CO." as nominee for DTC and immobilized in the custody of DTC. The note certificate bears the District seal, which is also affixed to this certificate.

We, the said officers, also certify as follows:

1. Authority. The Notes are issued in anticipation of the sale of \$9,007,030 Monomoy Regional Middle School Bonds (Siding and Trim Replacement) under G.L. c.71, §16(d), and a vote of the Committee duly called and held on March 13, 2025, as approved by the District's member towns of Chatham and Harwich, Massachusetts (together, the "Member Towns"), excluded from the limitations of Proposition 2 ½, so-called, by vote of the member Town of Harwich, Massachusetts, and a vote of the Committee duly adopted on April 9, 2026.

2. Description and Purpose of Notes. The District is issuing and delivering the Notes simultaneously with the delivery of this certificate. The Notes are being issued for the purpose of siding and trim replacement at the Monomoy Regional Middle School.

3. Other Debt. No other debt has been incurred under that vote of the Committee except for the \$5,000,000 notes dated September 19, 2025 and payable September 18, 2026.

4. Approval of Sale. We approve the sale of the Notes to Huntington Securities, Inc. (the "Purchaser") at par and accrued interest, if any, plus a premium of \$19,298.74.

B. Delivery and Receipt. I, the District Treasurer, certify that the Notes were delivered on this date and that the full purchase price including accrued interest for the period, if any, from the date of the Notes to this date was received from the Purchaser on or before this date.

C. Certification Regarding Official Statement. I, the District Treasurer, further certify as follows:

(a) I have reviewed the Preliminary Official Statement dated March 24, 2026 (the "Preliminary Official Statement") and the Official Statement dated April 1, 2026 (the "Official Statement") relating to the sale of the Notes.

(b) To the best of my knowledge and belief, the Preliminary Official Statement did not, as of its date and as of the date of sale of the Notes, and the Official Statement (excluding the price or yield on the cover page, as to which no view is expressed) did not as of its date and does not as of this date (which is the date of delivery of the Notes), contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements made therein, in light of the circumstances under which they were made, not misleading.

(c) Since the date of the Official Statement there has been no material adverse change in the financial condition or affairs of the District except as set forth in or contemplated by the Official Statement.

D. Debt Limit. I, the District Treasurer, further certify that at the time of their authorization, the Notes and the bonds in anticipation of which they are issued were and on the date hereof are within every applicable debt and other limit prescribed by law or otherwise.

E. Certificate of District Secretary. I, the District Secretary, certify as follows:

(a) Signatures and Incumbency. The signatures of the District Treasurer and the Chair as appearing below are the genuine signatures of the persons who executed the Notes and who held those offices when the Notes were signed and when the Notes were delivered.

(b) Open Meeting Law. All proceedings essential to the issue of the Notes and the authorization of the bonds and deliberations of a quorum relating thereto have been taken at a meeting or meetings open to the public; notice of each such meeting was filed in my office and with the Town Clerks of each of the Member Towns and publicly posted in the time and manner set forth in G.L. c.30A, §§18-25, as amended, or, if applicable, in accordance with an alternative method of notice prescribed or approved by the Attorney General as set forth in 940 CMR 29.03(4)(b); no deliberations, decision or vote in connection with the Notes or bonds were taken in executive session and no vote was taken by secret ballot; and the official record of each such meeting was made available to the public and remains available to the public as set forth in G.L. c.30A, §§18-25, as amended.

(c) Proceedings. No proceeding essential to the issue of the Notes or bonds has been repealed or amended except as stated in Paragraph A(1) above and no proceedings have been taken relating to the Notes or bonds other than those certified to Troutman Pepper Locke LLP.

(d) District Agreement. There have been no further amendments of or additions to the District Agreement as amended and restated on May 25, 2022.

(e) Bylaws. The District has not adopted any bylaws or standing votes affecting the authorization, sale or issue of the Notes or bonds, including the calling and conduct of

Committee meetings, or the use of assessments or other charges imposed to pay for any project financed by the Notes.

F. Execution of Counterparts and Delivery by Electronic Means. This certificate, as well as any other certificates or documents relating to the Notes (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document. Delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document. Electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

[Remainder of page intentionally omitted; signature page follows.]

G. No Litigation; No Financial Interest. All of the undersigned certify that there has been no litigation affecting the validity of the Notes or bonds or the power of the District and the Member Towns to procure the means of their repayment through the levy and collection of taxes; that none is pending or to our knowledge threatened; that neither the corporate existence nor boundaries of the District or the Member Towns nor the title of any of us to our respective offices is being contested; and that none of us and, to the best of our knowledge, no other official of the District has any direct or indirect financial interest in or relationship with the Purchaser.

Dated: April 30, 2026
(Date of delivery of and
payment for the Notes)

District Treasurer

Chair, Regional School District
School Committee

District Secretary

(District Seal)

251186563v1

(Please Note: The following statements are an essential part of the permanent bond record. Read them carefully before signing this certificate. Advise Troutman Pepper Locke LLP of any inaccuracy.)

TAX CERTIFICATE

This Tax Certificate is executed and delivered by the Monomoy Regional School District, Massachusetts ("Issuer"), in connection with the issuance of \$4,406,105 stated principal amount of its General Obligation Bond Anticipation Notes dated the Issue Date ("Issue"). The Issue is issued pursuant to Votes duly adopted by the Issuer and the Massachusetts General Laws. Pursuant to Reg §§ 1.141-2(d)(1) and 1.148-2(b)(2)(i), the Issuer certifies, covenants, warrants and represents as follows in connection with the issuance of the Issue:

ARTICLE I. IN GENERAL

1.1 Delivery of the Notes of the Issue. On the Issue Date, in exchange for receipt of good funds, the Issuer is delivering the notes of the Issue to the Successful Bidder, for resale to the Public.

1.2 Purpose of Tax Certificate. The Issuer is delivering this Tax Certificate to Bond Counsel, with the understanding that Bond Counsel will rely in part upon this Tax Certificate in rendering its opinion that interest on the Issue is excluded from gross income for federal income tax purposes under Section 103 and its opinion that the notes of the Issue are "qualified tax-exempt obligations" within the meaning of Section 265(b)(3).

1.3 Definitions and References. All capitalized terms used in this Tax Certificate include either the singular or the plural. All terms used in this Tax Certificate, including terms specifically defined, shall be interpreted in a manner consistent with Sections 103 and 141-150 and the applicable Regulations thereunder except as otherwise specified. Capitalized terms used and not otherwise defined herein and in the exhibits hereto and in the schedules and attachments to those exhibits shall have the respective meanings set forth in Appendix A and Appendix B hereto. Reference to a Section means a section of the Code. Reference by number only (for example, "2.10") means that numbered paragraph of this Tax Certificate.

1.4 Purpose of Financing. The Issue is being issued to provide funds (i) to finance on a "new money" basis the capital costs of certain municipal projects as more fully described in the Signature Certificate, including the payment of Capitalized Interest, if any ("Projects"), and Funded Interest, if any, and (ii) to pay Issuance Costs and other common costs of the Issue.

1.5 Single Issue. The notes of the Issue were sold to the Successful Bidder on the Sale Date. No other governmental obligations of the Issuer which are expected to be paid out of substantially the same source of funds as the Issue have been or will be sold less than 15 days apart from the Sale Date pursuant to the same plan of financing as the Issue.

1.6 Reliance. With respect to certain matters contained in this Tax Certificate, the Issuer specifically relies upon the certifications of the Successful Bidder set forth in Exhibit A, the certifications of the Municipal Advisor set forth in Exhibit B, and upon the certifications set forth

in the other exhibits attached hereto or as otherwise described herein. The Issuer is not aware of any facts or circumstances that would cause it to question the accuracy or reasonableness of any representation made in this Tax Certificate including the exhibits hereto.

ARTICLE II. GENERAL TAX LIMITATIONS

2.1 Application of Sale Proceeds and Certain Other Moneys. On the Issue Date, the Sale Proceeds, \$4,427,827.10, less an underwriter's discount of \$2,423.36, will be deposited to the General Fund and applied as follows:

Projects	\$4,406,105.00
Issuance Costs	<u>19,298.74</u>
TOTAL:	\$4,425,403.74

Investment Proceeds earned on the amounts in the General Fund will be commingled with other revenues of the Issuer, and are expected to be expended for operating or other expenses of the Issuer within six months after deposit of the Investment Proceeds therein. Pursuant to Reg § 1.148-6(d)(6), all such Investment Proceeds will be treated as expended when so commingled.

2.2 Expenditure of Gross Proceeds. For purposes of this Tax Certificate, Sale Proceeds and, to the extent not deemed expended as described in 2.1, Investment Proceeds will be treated as spent when they are used to pay or reimburse disbursements by the Issuer that are (i) capital expenditures, including any Capitalized Interest, if any and to the extent allowable, (ii) Issuance Costs, (iii) Funded Interest, (iv) initial operating expenses directly associated with the Projects (in an aggregate amount not exceeding 5% of the Sale Proceeds), or (v) other miscellaneous expenditures described in Reg § 1.148-6(d)(3)(ii).

The Issuer hereby certifies that no disbursement to be paid or reimbursed from Gross Proceeds shall have been previously paid or reimbursed from the proceeds of any other obligation, whether issued by the Issuer or any other party.

To the extent that Sale Proceeds will be applied to reimburse expenditures made by the Issuer prior to the Issue Date, the Issuer hereby certifies that such expenditures either (i) constitute capital expenditures incurred not earlier than 60 days prior to the applicable Vote, which Votes constitute the Issuer's declarations of official intent to issue debt to finance the costs of the Projects, or (ii) constitute Preliminary Expenditures to the extent permitted by Massachusetts law.

The Issuer further certifies that any such reimbursement described in clause (i) of the preceding sentence shall be made not later than 18 months after the later of the date of the expenditure or the date on which the Project component to which such expenditure relates is placed in service, but in no event more than 3 years after the date of such expenditure.

2.3 Governmental Bond Status. Absent an Opinion of Bond Counsel, the Issuer will not loan more than 5% of the Proceeds to one or more Nongovernmental Persons. Absent an Opinion of Bond Counsel, the Issuer has not allowed and will not allow more than 10% of the Proceeds or the Projects to be used directly or indirectly by any Nongovernmental Person in any

trade or business, other than as a member of the general public, and has not allowed and will not allow more than 5% of the Proceeds or the Projects to be so used to the extent such use is unrelated or disproportionate to the governmental uses thereof. Absent an Opinion of Bond Counsel, for purposes of this 2.3, a Nongovernmental Person will be treated as “using” Proceeds or the Projects to the extent the Nongovernmental Person:

- (i) borrows Proceeds of the Issue;
- (ii) uses any portion of the Projects as owner, lessee, service provider, operator, or manager;
- (iii) acquires the output of the Projects; or
- (iv) enters into any other arrangement that provides a special legal entitlement or special economic benefit to a Nongovernmental Person.

As of the Issue Date, the Issuer certifies that there are no contracts or other arrangements for any such use of any component of the Projects by any party other than a Governmental Unit. Absent an Opinion of Bond Counsel, the Issuer will not enter into any contract or other arrangement after the Issue Date for any such use of any component of the Projects by any party other than a Governmental Unit.

2.4 Qualified Equity. The Issuer reasonably expects that a portion of the cost of the Projects being financed and/or refinanced in part with the Sale Proceeds may be paid from Qualified Equity. The Issuer intends that the undivided portion or portions of any of the Projects paid with Qualified Equity may be used for Private Business Use without restriction. Qualified Equity will be allocated to any Private Business Use of the Projects before any Proceeds are allocated to any such Private Business Use. To the extent that Private Business Use of the Projects ever exceeds the applicable limitation under the “private business tests” imposed pursuant to Section 141(b), the Issuer hereby allocates Qualified Equity to the Projects. In addition, the Issuer reserves the right to allocate this Qualified Equity to the Projects if and as needed in the future.

2.5 Change in Use. The Issuer reasonably expects to use all Proceeds and all facilities that are financed and refinanced therewith as set forth in 2.3 for the entire stated term to maturity of the Issue. Absent an Opinion of Bond Counsel, the Issuer in fact will use all Proceeds and each facility financed and refinanced therewith as set forth in 2.3.

2.6 Registered Form. The notes of the Issue are being issued in registered form.

2.7 Federal Guarantee. The Issuer will not directly or indirectly use or permit the use of any Proceeds or any other funds of the Issuer or any Related Party or take or omit to take any action that would cause the notes of the Issue to be obligations that are “federally guaranteed.” In furtherance of this covenant, the Issuer will not allow the payment of principal or interest with respect to the Issue to be guaranteed (directly or indirectly) in whole or in part by the United States or any agency or instrumentality thereof. Except as provided in the next sentence, the Issuer will not use 5% or more of the Proceeds to make or finance loans the payment of principal or interest

with respect to which is guaranteed in whole or in part by the United States or any agency or instrumentality thereof, nor will it invest 5% or more of the Proceeds in federally insured deposits or accounts. The preceding sentence shall not apply to (i) investments in the portions of the General Fund described in 3.5 during the temporary period described therein, (ii) investments in the Bona Fide Debt Service Fund, and (iii) investments in obligations issued by the United States Department of Treasury.

2.8 Information Reporting. The Issuer will cause a properly completed and executed IRS Form 8038-G to be filed with respect to the Issue no later than the 15th day of the second month of the calendar quarter immediately following the calendar quarter of the Issue Date.

2.9 No Pooling. The Issuer will not use any Proceeds directly or indirectly to make or finance loans to two or more ultimate borrowers.

2.10 No Hedge Bonds. The Issuer reasonably expects that more than 85% of Net Sale Proceeds of the Issue will be expended for the governmental purposes thereof within three years after the Issue Date. Not more than 50% of the Proceeds will be invested at a substantially guaranteed yield for four years or more.

2.11 Useful Life. The weighted average maturity of the Issue is 0.383 years, which does not exceed 120% of the remaining average reasonably expected economic life of the assets comprising the Projects.

ARTICLE III. ARBITRAGE GENERAL

3.1 Reasonable Expectations. This Article III states the Issuer's reasonable expectations with respect to the amounts and uses of Proceeds and certain other moneys.

3.2 Issue Price of the Issue. On the Issue Date, the Issuer is delivering the notes of the Issue to the Successful Bidder in exchange for an aggregate payment of \$4,425,403.74 (which represents the total amount of Sale Proceeds, \$4,427,827.10, less an underwriter's discount of \$2,423.36). As reflected in Exhibit B, the Municipal Advisor has certified that the competitive sale requirements (as defined in the Notice of Sale) were met with respect to the notes of the Issue. Accordingly, based on the advice of the Successful Bidder as set forth in Exhibit A, the Issue Price of the Issue is \$4,427,827.10, which is the reasonably expected initial offering price to the Public for the notes of the Issue.

3.3 Funds and Accounts. The Issuer will use certain portions of its General Fund (or accounts or subaccounts within the General Fund) to hold certain of the Proceeds, as more particularly described in this Article III. The Issuer does not expect that either it or any other Person benefiting from the issuance of the Issue will use any moneys in any fund or account other than the Bona Fide Debt Service Fund to pay debt service on the Issue; nor is any other fund or account so pledged as security for the Issue that there is a reasonable assurance that amounts held in such other fund or account will be available if needed to pay debt service on the Issue.

3.4 Bona Fide Debt Service Fund.

3.4.1 Payment of the Issue. The notes of the Issue are general obligations of the Issuer payable from revenues available therefor pursuant to the Massachusetts General Laws and, when and as applicable, Sale Proceeds, Investment Proceeds, and the Proceeds of Refunding Obligations.

3.4.2 Revenues. Except for the debt service to be paid from a portion of the Sale Proceeds, Investment Proceeds, and the Proceeds of Refunding Obligations, each when and as applicable, payments of debt service on the Issue are expected to be derived from current revenues of the Issuer and current revenues are expected to equal or exceed such amount of debt service on the Issue during the payment period.

3.4.3 Match Between Revenues and Debt Service. The portions of the Issuer's General Fund that are reasonably expected to be used to pay debt service on the Issue (such portions of the Issuer's General Fund being referred to herein as the "Debt Service Fund") will be allocated to the payment of debt service on the Issue on a "first in, first out" (FiFo) basis. Accordingly, the Debt Service Fund will be used primarily to achieve a proper matching of revenues and debt service within the Bond Year. Amounts in the Debt Service Fund will be invested without regard to yield.

3.5 Three-Year Temporary Period. A portion of the Sale Proceeds in the amount of \$4,406,105.00, will be deposited in the General Fund for the purpose of paying costs of the Projects. The Issuer's expenditure expectations with respect to the Proceeds allocable to the Projects are reflected in Exhibit C. The Issuer reasonably expects that at least 85% of the Net Sale Proceeds will be spent to pay costs of the Projects within three years from the Issue Date. The Issuer heretofore has incurred or within six months hereafter will incur a binding obligation to one or more unrelated parties involving an expenditure of not less than 5% of Net Sale Proceeds. Completion of the Projects and allocations of Net Sale Proceeds and Investment Proceeds to costs of the Projects will proceed with due diligence. Net Sale Proceeds allocable to paying costs of the Projects held in the General Fund, and Investment Proceeds earned thereon, will be invested without regard to yield during the period ending on the third anniversary of the Issue Date.

3.6 No Overissuance. Taking into account anticipated Investment Proceeds, the Sale Proceeds do not exceed the amount necessary to pay (i) costs of the Projects, (ii) Funded Interest, if applicable, and (iii) Issuance Costs and other common costs of the Issue.

3.7 No Other Replacement Proceeds. Neither the Issuer nor any Related Party will use any Gross Proceeds directly or indirectly to replace funds of the Issuer or any Related Party, which funds are or will be used directly or indirectly to acquire Investment Property reasonably expected to produce a yield that is materially higher than the Yield on the Issue.

3.8 No Expected Sale. It is not expected that the Projects or any part thereof financed and/or refinanced in whole or in part by the Issue will be sold or otherwise disposed of before September 18, 2026, the scheduled final maturity date of the Issue, except for minor portions due to normal wear or obsolescence.

ARTICLE IV. ARBITRAGE - YIELD AND YIELD RESTRICTION

4.1 Yield. The Yield on the Issue, adjusted as may be required for substantial original issue premium or discount, has been calculated by the Municipal Advisor to be 2.7048434%, as reflected in Exhibit B.

4.2 No Qualified Hedges. No Qualified Hedge has been, and (absent an Opinion of Bond Counsel) no Qualified Hedge will be, entered into such that failure to take the Qualified Hedge into account would distort the Yield on the Issue or otherwise would fail clearly to reflect the economic substance of the transaction.

4.3 Yield Restriction. Absent an Opinion of Bond Counsel, if the sum of (A) any Proceeds allocable to the payment of the Projects held in the General Fund after the third anniversary of the Issue Date, or, if applicable, the Issue Date of any Original Issue, plus (B) any amounts held in the Bona Fide Debt Service Fund and remaining unexpended after 13 months from the date of accumulation in such fund (excluding any amounts held for Capitalized Interest and Funded Interest), plus, if applicable, (C) any Proceeds allocable to the retirement of any Refunded Bonds and Refunded Notes held in the General Fund after 90 days from the Issue Date, plus, if applicable, (D) any Transferred Proceeds held in the General Fund after the third anniversary of any Original Issue, plus (E) any Proceeds held in the Issuer's General Fund to pay Issuance Costs after 90 days from the Issue Date, at any time in the aggregate exceeds \$100,000, the excess will be invested as follows: (i) in Investment Property with a yield not exceeding the Yield on the Issue, or such other issue of Tax-Exempt Bonds to which such amounts are then allocated as proceeds, (ii) in assets that are not treated as Investment Property (e.g., Tax-Exempt Bonds), or (iii) in assets that satisfy the requirements for Yield Reduction Payments.

ARTICLE V. REBATE

5.1 Undertakings. The Issuer hereby covenants to comply with requirements of the Code pertaining to the Rebate Requirement. The Issuer acknowledges that the United States Department of the Treasury has issued Regulations with respect to certain of these undertakings, including the proper method for computing whether any rebate amount is due the federal government under Section 148(f). (Reg §§ 1.148-1 through 1.148-11A, 1.150-1, and 1.150-2.) The Issuer further acknowledges that the United States Department of the Treasury may yet issue additional Regulations with respect to certain of these undertakings. The Issuer covenants that it will undertake to determine what is required with respect to the rebate provisions contained in Section 148(f) and said Regulations from time to time and will comply with any requirements that may apply to the Issue.

5.2 Recordkeeping. The Issuer shall maintain or cause to be maintained detailed records with respect to each Nonpurpose Investment allocable to Gross Proceeds, including: (a) purchase date; (b) purchase price; (c) information establishing fair market value on the date such investment became a Nonpurpose Investment; (d) any accrued interest paid; (e) face amount; (f) coupon rate; (g) periodicity of interest payments; (h) disposition price; (i) any accrued interest

received; and (j) disposition date. Such detailed recordkeeping is required to facilitate the calculation of the Rebate Requirement.

5.3 Exceptions to the Rebate Requirement.

5.3.1 Small Issuer Exception. No rebate calculations will be required to be made with respect to the Issue because the Issuer has met the Small Issuer Exception.

5.3.2 Two-Year Spending Exception. The Issuer reasonably expects that at least 75% of Available Construction Proceeds will be expended for Construction Expenditures with respect to the Projects. The Issuer's spending expectations with respect to the Proceeds allocable to the New Money Projects or the Projects, as applicable, are reflected in Exhibit C. In general, when applicable, no rebate calculations will be required with respect to Available Construction Proceeds if Available Construction Proceeds are spent in accordance with the Two-Year Spending Exception. Additionally, Proceeds of the Issue that are used to pay Issuance Costs will be treated, together with all Investment Proceeds thereon, as satisfying the Rebate Requirement if the Two-Year Spending Exception is satisfied and all such Issuance Costs are paid within twenty-four months after the Issue Date.

5.4 Rebate Requirement or Yield Reduction Payments with Respect to the Issue. The Issuer covenants to, and will, pay any Rebate Requirement or Yield Reduction Payments due with respect to the Issue within 60 days from the Computation Date for the Issue or, if later, within 60 days of missing one of the spending milestones, as required by Section 148(f)(3).

ARTICLE VI. OTHER MATTERS

6.1 Bank Qualification. The Issuer, and all of its subordinate entities, if any, do not reasonably anticipate issuing tax-exempt bonds, notes or other obligations (other than private activity bonds and current refunding bonds to the extent the amount thereof does not exceed the outstanding amount of the obligations to be refunded thereby), as shown in Exhibit D, during calendar year 2026, which, in the aggregate, will exceed \$10,000,000 (including all such obligations issued to date, the portion of the Issue being newly designated on the Issue Date and all such obligations expected to be issued during the balance of the current calendar year). The Notes are "qualified tax-exempt obligations" for purposes of Section 265(b)(3). We hereby newly designate the Issue as "qualified tax-exempt obligations" for purposes of Section 265(b)(3), as reflected in Exhibit D. No entity has been formed by the Issuer or for the benefit of the Issuer in order to avoid the \$10,000,000 limitations in Sections 265(b)(3)(C) and (D).

6.2 Expectations. The undersigned are authorized representatives of the Issuer acting for and on behalf of the Issuer in executing this Tax Certificate. To the best of the knowledge and belief of the undersigned, there are no other facts, estimates or circumstances that would materially change the expectations as set forth herein, and said expectations are reasonable.

6.3 Covenant to Comply. The Issuer hereby covenants that it will not take or permit to be taken on its behalf any action or actions that would adversely affect the exclusion from federal income taxation of interest on the Issue and will take or require to be taken such acts as may

reasonably be within its ability and as may from time to time be required under applicable law to maintain the exclusion from federal income taxation of interest on the Issue.

6.4 Post Issuance Compliance Procedures. The Issuer has written procedures to monitor compliance with the arbitrage Yield restriction and rebate requirements of Section 148 after the Issue Date. The Issuer also has written procedures to ensure that all Nonqualified Bonds are remediated in accordance with Reg § 1.141-12. Such procedures are substantially in the form attached hereto as Appendix C. The Issuer will monitor the expenditure of Gross Proceeds and the use of facilities financed and/or refinanced by the Issue, and will undertake, if necessary, any available measures under Reg § 1.141-12 to ensure compliance after the Issue Date with the applicable covenants contained herein.

6.5 Record Retention. In order to ensure that interest on the Issue continues to be excluded from gross income for federal tax law purposes, the Issuer acknowledges that records should be maintained to support the representations, certifications, and expectations set forth in this Tax Certificate (including the exhibits hereto) at least until the date three (3) years after the later of (a) the date on which the Issue is retired, or (b) the date on which the last of the Refunding Obligations is retired. In addition to the items described in 5.2, records to be retained include, but are not limited to:

- (i) basic records and documents relating to the Issue, and, when applicable, the Prior Issues and any Qualified Equity relating to the Projects;
- (ii) documentation evidencing the expenditure of the Proceeds and, when applicable, Proceeds of the Prior Issues;
- (iii) documentation evidencing the use of the Projects or any component thereof by public and private sources (i.e., copies of management contracts, research agreements, leases, etc.);
- (iv) documentation evidencing all sources of payment or security for the Issue and, when applicable, the Prior Issues;
- (v) documentation evidencing compliance with the timing and allocation of expenditures of the Proceeds, and, when applicable, Proceeds of the Prior Issues and any Qualified Equity relating to the Projects; and
- (vi) records of all amounts paid to the United States in satisfaction of the Rebate Requirement for the Issue and IRS Forms 8038-T (or successor forms thereto) related to such payments or to Yield Reduction Payments.

6.6 Amendments. Notwithstanding any other provision of this Tax Certificate, the Issuer may amend this Tax Certificate and thereby alter any actions allowed or required by this Tax Certificate if such amendment is signed by an authorized officer and is supported by an Opinion of Bond Counsel.

[Remainder of page intentionally left blank; signature page follows.]

6.7 Survival of Payment or Defeasance. Notwithstanding any provision in this Tax Certificate or in any other agreement or instrument relating to the Issue to the contrary, the obligation to remit the Rebate Requirement, if any, to the United States Department of the Treasury and to comply with all other requirements contained in this Tax Certificate shall survive payment or defeasance of the Issue.

6.8 Execution of Counterparts and Delivery by Electronic Means. This Certificate, as well as any other certificates or documents relating to the Issue (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document. Delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document. Electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

Dated: April 30, 2026

MONOMOY REGIONAL SCHOOL DISTRICT,
MASSACHUSETTS

By: _____
Treasurer

By: _____
Chair, Regional School District
School Committee

APPENDIX A GENERAL DEFINITIONS

For purposes of the Tax Certificate to which this Appendix A is attached, and the exhibits to the Tax Certificate and any schedules or attachments to those exhibits, the following capitalized terms have the following meanings:

501(c)(3) Organization means any entity described in Section 501(c)(3).

Adjusted Gross Proceeds generally means Gross Proceeds, less amounts held in the Bona Fide Debt Service Fund.

Available Construction Proceeds has the meaning set forth in Reg § 1.148-7(i) and generally means all Sale Proceeds reduced by Issuance Costs or, if applicable, all Sale Proceeds allocable to the Nonrefunding Portion, reduced by Issuance Costs allocable to the Nonrefunding Portion financed with Sale Proceeds, plus all Investment Proceeds earned thereon before the earlier of two years after the Issue Date or substantial completion of the New Money Projects or Projects, as applicable. In determining the amount of Available Construction Proceeds as of any date, there shall be included the amount of investment earnings reasonably expected after such date, together with investment earnings actually received or accrued as of such date.

Bona Fide Debt Service Fund has the meaning set forth in Reg § 1.148-1(b) and generally means the Debt Service Fund identified in 3.4.3.

Bond Counsel means Troutman Pepper Locke LLP or, if applicable, another law firm with a nationally recognized public finance practice.

Bond Notice of Sale means, when applicable, the separate Notice of Sale for the bonds of the Issue.

Bond Purchaser means, when applicable, an entity that purchases the bonds of the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Capitalized Interest means interest on the Issue, or, when applicable, a Prior Issue, from the Issue Date to the placed in service date of the Projects, that is properly capitalized in the cost of the Projects under general federal income tax principles.

Code means the Internal Revenue Code of 1986, as amended.

Computation Date has the meaning set forth in Reg § 1.148-3(e) and generally means the date not later than the fifth Bond Year and each five years thereafter and the final maturity date of the Issue, each as applicable.

Construction Expenditures has the meaning set forth in Reg § 1.148-7(g)(1) and generally means capital expenditures that are allocable to the cost of real property or constructed personal property and includes costs of reconstruction and rehabilitation, but does not include costs of acquiring any interest in land or other existing real or personal property.

Controlled Group has the meaning set forth in Reg § 1.150-1(c) and generally means a group of entities controlled directly or indirectly by the same entity or group of entities.

Debt Service Fund means the Debt Service Fund described in Article III.

Deliberate Action has the meaning set forth in Reg § 1.141-2(d)(3) and generally means any action taken by the Issuer that is within its control, but excludes (i) an involuntary or compulsory conversion under Section 1033 or (ii) an action taken in response to a regulatory directive made by the federal government.

Eighteen Month Spending Exception has the meaning set forth in Reg § 1.148-7(d) and generally means Adjusted Gross Proceeds are spent at least as quickly as follows:

15% within six months after the Issue Date

60% within twelve months after the Issue Date

100% within eighteen months after the Issue Date

The requirement that 100% of Adjusted Gross Proceeds be spent within eighteen months after the Issue Date will be met if at least 95% of Adjusted Gross Proceeds is spent within eighteen months and the remainder is held as a Reasonable Retainage, as permitted by contracts with the Issuer's contractors, and such remainder is spent within thirty months after the Issue Date.

Fixed Yield Bond has the meaning set forth in Reg § 1.148-1(b) and generally means any bond whose yield is fixed and determinable on its Issue Date.

Fixed Yield Issue has the meaning set forth in Reg § 1.148-1(b) and generally means any issue of which each bond of the issue is a Fixed Yield Bond.

Funded Interest means interest on the Issue, or, when applicable, a Prior Issue, other than Capitalized Interest, through the later of three years after the Issue Date, or, if applicable, the Issue Date of a Prior Issue, or one year after the first component of the Projects is placed in service as set forth in Reg § 1.148-6(d)(3)(ii)(A)(3).

General Rule Maturities means, when applicable, those Maturities listed as the general rule maturities in Schedule A to the attached Issue Price Certificate for the Bonds of the Issue or the Notes of the Issue, as applicable.

Governmental Person has the meaning set forth in Reg § 1.141-1(b) and generally means a Governmental Unit.

Governmental Unit means a State or Local Governmental Unit.

Gross Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means all proceeds derived from or relating to the Issue, or, when applicable, a Prior Issue, including Proceeds and Replacement Proceeds.

Guidelines means Reg §1.141-3(b)(4) and Revenue Procedure 2017-13 or any applicable predecessor or successor thereto.

Hold-the-Offering-Price Maturities means, when applicable, those Maturities listed as the hold-the-offering-price maturities in Schedule A to the attached Issue Price Certificate for the Bonds of the Issue or the Notes of the Issue, as applicable.

Holding Period means, with respect to a Hold-the-Offering-Price Maturity, the period starting on the Sale Date and ending on the earlier of (i) the close of the fifth business day after the Sale Date, or (ii) the date on which the Successful Bidder/Successful Bond Bidder/Successful Note Bidder sold at least 10% of such Hold-the-Offering-Price Maturity to the Public at prices that are no higher than the initial offering price for such Hold-the-Offering-Price Maturity.

Investment Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means earnings received from investing and reinvesting Proceeds and from investing and reinvesting such earnings.

Investment Property has the meaning set forth in Section 148(b)(2) and generally means any security or obligation, any annuity contract, or any other investment-type property, but does not include any Tax-Exempt Bond.

Issuance Costs has the meaning set forth in Reg § 1.150-1(b) and generally means costs, to the extent incurred in connection with, and allocable to, the issuance of the Issue within the meaning of Section 147(g), and includes: underwriters' spread; counsel fees; financial advisory fees; credit rating fees; trustee fees; paying agent fees; bond registrar, certification, and authentication fees; accounting fees; printing costs; public approval process costs; engineering and feasibility study costs; and similar costs.

Issue Date has the meaning set forth in Reg § 1.150-1(b) and generally means the date the Issue, or, when applicable, a Prior Issue, was delivered to the Underwriter or Purchaser thereof and payment was received therefor.

Issue Price has the meaning set forth in Reg § 1.148-1(f) and generally means (i) the Expected Offering Price of a Successful Bidder/Successful Bond Bidder/Successful Note Bidder, (ii) the amount paid by the Purchaser for the Issue, the notes of the Issue, and/or the bonds of the Issue, and/or (iii) the price at which at least 10% of each maturity of the General Rule Maturities were sold by the Successful Bidder/Successful Bond Bidder/Successful Note Bidder, all as set forth in Exhibit A, or, when applicable, the sum of the applicable clauses above.

Maturity means bonds and/or notes of the Issue with the same credit and payment terms. Bonds and/or notes of the Issue with different maturity dates, or with the same maturity date but different stated interest rates, are treated as separate maturities.

Minor Portion has the meaning set forth in Section 148(e) and generally means any amount of Gross Proceeds that does not exceed the lesser of (i) 5% of the Proceeds or (ii) \$100,000.

Net Sale Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means the Sale Proceeds allocable to the Nonrefunding Portion, less the portion of those Sale Proceeds

invested in a reasonably required reserve or replacement fund pursuant to Section 148(d) or as part of the Minor Portion.

Nongovernmental Person means any Person other than a Governmental Person. Nongovernmental Person includes the United States and any agency or instrumentality of the United States.

Nonpurpose Investment means any Investment Property in which Gross Proceeds are invested that is not a Purpose Investment.

Nonqualified Bonds has the meaning set forth in Reg § 1.141-12(j) and generally means the portion of outstanding bonds of an Issue that, as of the date of a Deliberate Action, would not meet the private business use test in Section 141(b) or the private loan financing test in Section 141(c).

Nonrefunding Portion means, when applicable, the portion of the Issue or the Prior Issue, as applicable, that is not allocable to the Refunding Portion.

Note Notice of Sale means, when applicable, the separate Notice of Sale for the notes of the Issue.

Note Purchaser means, when applicable, an entity that purchases the notes of the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Notice of Sale means the Notice of Sale, or, when applicable, collectively the Bond Notice of Sale and Note Notice of Sale, attached as Attachment 1 to Exhibit B.

Opinion of Bond Counsel means a written opinion of nationally recognized bond counsel, delivered to the Issuer, to the effect that the exclusion from gross income for federal income tax purposes of interest on the Issue will not be adversely affected.

Original Issues means, when applicable, collectively, the portions of the Refunded Bonds and/or Refunded Notes and the issues that were issued to finance the Projects on a "new money" basis and any other obligations all or a portion of which were issued to finance the Projects on a new money basis which have been ultimately refinanced by this Issue.

Person has the meaning set forth in Section 7701(a)(1) and generally includes an individual, trust, estate, partnership, association, company or corporation.

Preliminary Expenditures has the meaning set forth in Reg § 1.150-2(f)(2) and generally means architectural, engineering, surveying, soil testing, Issuance Costs, including, when applicable, Issuance Costs allocable to the Nonrefunding Portion, and similar costs paid with respect to the Projects in an aggregate amount not exceeding 20% of the Issue Price of the Issue, or, when applicable, the Issue Price of the Issue allocable to the Nonrefunding Portion. However, Preliminary Expenditures do not include land acquisition, site preparation or similar costs incident to the commencement of construction.

Prior Issue(s) means, when applicable, individually or collectively, the Original Issues and each series of exclusively current refunding obligations all or a portion of which were thereafter issued to refinance the Original Issues.

Private Business Use has the meaning set forth in Reg § 1.141-3(a) and generally means use (directly or indirectly) in a trade or business carried on by any Nongovernmental Person other than use (i) as a member of, and on the same basis as, the general public or (ii) pursuant to the Guidelines or the Research Guidelines. Any activity carried on by a Nongovernmental Person (other than a natural Person) shall be treated as a trade or business.

Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means Sale Proceeds, Investment Proceeds and Transferred Proceeds of the Issue or, when applicable, a Prior Issue.

Public has the meaning set forth in Reg § 1.148-1(f)(3)(ii) and generally means any Person other than an Underwriter or a Related Party to an Underwriter.

Purchaser means, when applicable, an entity, including a Successful Bidder, that purchases the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Purpose Investment has the meaning set forth in Reg § 1.148-1(b) and generally means an investment that is acquired by the Issuer to carry out the governmental purpose of the Issue.

Qualified Equity has the meaning set forth in Reg § 1.141-6(b)(3) and generally means funds that are not derived from proceeds of a Tax-Advantaged Bond.

Qualified Guarantee has the meaning set forth in Reg § 1.148-4(f) and generally means an arrangement that imposes a secondary liability that unconditionally shifts substantially all of the credit risk for all or part of the payments on the Issue to the guarantor under that arrangement.

Qualified Hedge has the meaning set forth in Reg § 1.148-4(h) and generally means a contract entered into by the Issuer with a hedge provider primarily to modify the Issuer's risk of interest rate changes with respect to all or a part of the Issue.

Reasonable Retainage has the meaning set forth in Reg § 1.148-7(h) and generally means an amount, not to exceed 5% of Available Construction Proceeds or Adjusted Gross Proceeds, as applicable, on the date 24 months, or 18 months, as applicable, after the Issue Date, that is retained for reasonable business purposes relating to the Projects, including to ensure or promote compliance with a construction contract.

Rebate Requirement means the amount of rebatable arbitrage with respect to the Issue, computed as of the last day of any Bond Year pursuant to Reg § 1.148-3.

Refunded Bonds means, when applicable, all or the portion of each of the series of bonds being refunded by the Issue, as identified in Appendix B.

Refunded Notes means, when applicable, all or the portion of each of the series of notes being refunded by the Issue, as identified in Appendix B.

Refunding Obligations means a Tax-Advantaged Bond issued to refund any portion of the Issue, including any subsequent Tax-Advantaged Bond in a series of refundings thereof.

Refunding Portion means, when applicable, the portion of the Issue allocable to the refunding of the Refunded Bonds and/or Refunded Notes, together with the portion of the Issue allocable to the financing of a ratable share of Issuance Costs and other common costs of the Issue.

Regulations or Reg means the applicable Treasury Regulations promulgated by the Secretary of the Treasury of the United States under the Code.

Related Party has the meaning set forth in Reg §1.150-1(b) and generally means, in reference to a Governmental Unit or a 501(c)(3) Organization, any member of the same Controlled Group, and in any reference to any other Person, any two or more Persons who have more than fifty percent (50%) common ownership, directly or indirectly.

Replacement Proceeds has the meaning set forth in Reg §1.148-1(c) and generally means amounts that have a sufficiently direct nexus to the Issue or to the governmental purpose of the Issue to conclude that the amounts would have been used for that governmental purpose if the Proceeds of the Issue were not used, and includes a sinking fund, a pledged fund, and other replacement proceeds, each as defined in Reg § 1.148-1(c).

Research Guidelines means Reg §1.141-3(b)(6) and Revenue Procedure 2007-47 or any applicable successor thereto.

Sale Date has the meaning set forth in Reg § 1.150-1(c)(6) and generally means the first day on which there is a binding contract in writing for the sale of a Maturity.

Sale Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means amounts actually or constructively received from the sale of the Issue, or, when applicable, a Prior Issue.

Signature Certificate means the Signature, No Litigation and Official Statement Certificate or similar certificate prepared by Bond Counsel relating to the Issue or, when applicable, a Prior Issue.

Small Issuer Exception has the meaning set forth in Section 148(f)(4)(D) and Reg § 1.148-8(a) and generally means that, as of the Issue Date, either (i) the Issue meets the exception for a current refunding under Section 148(f)(4)(D)(v) or (ii) the Issuer reasonably expects that the aggregate Issue Price of Tax-Exempt Bonds (other than (a) current refunding bonds to the extent the amount thereof does not exceed the outstanding amount of the obligations to be refunded thereby and (b) qualified private activity bonds) issued and to be issued by or on behalf of the Issuer during the current calendar year will not exceed \$5,000,000 except by the lesser of (1) \$10,000,000 or (2) the aggregate face amount of bonds, in either case attributable to financing the construction of public school facilities, as provided in Section 148(f)(4)(D)(vii). In addition, the Issuer must have the power to impose or to cause the imposition of taxes of general applicability which, when collected, may be used for the general purposes of the Issuer. The Issuer's power to impose or cause the imposition of such taxes cannot be contingent on approval by any other Governmental Unit. The Issuer cannot form or avail itself of an entity for the purpose of avoiding the volume limitation described above.

State or Local Governmental Unit has the meaning set forth in Reg § 1.103-1(a) and is generally a state or any political subdivision of a state, but excludes the United States and its agencies or instrumentalities.

Successful Bidder(s) means, when applicable, the Successful Bidder(s) set forth in Appendix B.

Successful Bond Bidder means, when applicable, the Successful Bond Bidder set forth in Appendix B.

Successful Note Bidder means, when applicable, the Successful Note Bidder set forth in Appendix B.

Tax-Advantaged Bond has the meaning set forth in Reg § 1.150-1(b) and generally means a Tax-Exempt Bond or a taxable bond that provides a federal tax benefit that reduces the Issuer's borrowing costs.

Tax Certificate means the Tax Certificate to which this Appendix A is attached.

Tax-Exempt Bond means any obligation the interest on which is excluded from gross income for federal income tax purposes pursuant to Section 103, other than a "specified private activity bond" within the meaning of Section 57(a)(5)(C), as well as (i) stock in a "regulated investment company" (within the meaning of Section 852) to the extent at least 95 percent of income to the stockholder is treated as interest on Tax-Exempt Bonds and (ii) any demand deposit obligation issued by the United States Department of the Treasury pursuant to Subpart C of 31 CFR Part 344.

Transferred Proceeds has the meaning set forth in Reg § 1.148-9(b) and generally means Proceeds of a Prior Issue that become Proceeds of the Issue under the transferred proceeds allocation rule in Reg § 1.148-9(b).

Two-Year Spending Exception has the meaning set forth in Reg § 1.148-7(e) and generally means Available Construction Proceeds are expended at least as quickly as follows:

10% within six months after the Issue Date

45% within twelve months after the Issue Date

75% within eighteen months after the Issue Date

100% within twenty-four months after the Issue Date

The requirement that 100% of Available Construction Proceeds be spent within twenty-four months after the Issue Date will be met if at least 95% of Available Construction Proceeds is spent within twenty-four months and the remainder is held as Reasonable Retainage, as permitted by contracts with the Issuer's contractors, and such remainder is spent within thirty-six months after the Issue Date.

Underwriter means (i) any Person, including, when applicable, a Successful Bidder/Successful Bond Bidder/Successful Note Bidder, that agrees pursuant to a written contract with the Issuer (or with the lead underwriter to form an underwriting syndicate) to participate in the initial sale of the bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public, and (ii) any Person that agrees pursuant to a written contract directly or indirectly with a Person described in clause (i) of this paragraph to participate in the initial sale of such bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public (including a member of a selling group or a party to a third-party distribution agreement participating in the initial sale of such bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public).

Votes means the authorizations for the Issue specified in the Signature Certificate.

Yield has the meaning set forth in Reg § 1.148-4 for an issue and Reg § 1.148-5 for investments, and generally means, as to the Issue, or, when applicable, a Prior Issue, or Investment Property, as applicable, that discount rate which, when used in computing the present value of all unconditionally payable payments representing (i) principal, adjusted, as required, for any substantial discounts or premiums, (ii) interest, including costs of Qualified Guarantees, and (iii) payments or receipts on Qualified Hedges, produces an amount equal to the Issue Price of the Issue, or, when applicable, a Prior Issue, or the purchase price of Investment Property, as appropriate.

Yield Reduction Payment means a “qualified yield reduction payment” to the United States Department of the Treasury that reduces the yield on Investment Property, as set forth in Reg § 1.148-5(c).

APPENDIX B ISSUE SPECIFIC DEFINITIONS

For purposes of the Tax Certificate to which this Appendix B is attached, and the exhibits to the Tax Certificate and any schedules or attachments to those exhibits, the following capitalized terms have the following meanings:

Bond Year means the period beginning on the Issue Date and ending on September 18, 2026, which is the last day on which any notes of the Issue will remain outstanding for federal tax purposes.

Issue Date means, as to the Issue, the date of this Tax Certificate, April 30, 2026.

Municipal Advisor means Hilltop Securities Inc., as municipal advisor to the Issuer in connection with the Issue.

Sale Date of the Issue is April 1, 2026.

Sale Proceeds means as to the Issue, the amount of \$4,427,827.10, comprising the stated principal amount of the Issue (\$4,406,105), plus original issue premium thereon in the amount of \$21,722.10.

Successful Bidder means Huntington Securities, Inc.

APPENDIX C
POST-ISSUANCE TAX COMPLIANCE PROCEDURES
TAX-EXEMPT BONDS AND OTHER TAX-BENEFITED OBLIGATIONS

I. Introduction

These post-issuance compliance procedures of the Issuer are designed to provide for the effective management of the Issuer's post issuance compliance program for Tax-Exempt Bonds and other Tax-Advantaged Bonds in a manner consistent with state and federal laws applicable to such obligations.

II. Post-Issuance Tax Compliance

The Treasurer of the Issuer, or such other designated officer ("Compliance Officer") shall be the primary bond compliance officer responsible for each issuance by the Issuer of tax-exempt (or otherwise tax-benefited) bonds, notes, financing leases, or other obligations (herein, collectively referred to as "bonds"). All information related to each bond issue and the facilities, equipment and other assets financed by such issue shall be maintained by or on behalf of the Compliance Officer and the actions taken under subsections A through C of this Section II shall be taken by the Compliance Officer or on behalf of the Compliance Officer by such other officers or employees of the Issuer as appropriate.

A. Tax Certificate and Continuing Education

1. **Tax Certificate** – A Tax Certificate is prepared for each issuance of bonds. Immediately upon issuing any bonds, the Compliance Officer, in conjunction with the Issuer's bond counsel and financial advisor, shall review the Tax Certificate and make notes regarding specific compliance issues for such bond issue on the Post-Issuance Compliance Notes form at Exhibit A. The Tax Certificate and Notes shall clearly define the roles and responsibilities relating to the ongoing compliance activities for each bond issue and will identify specific compliance requirements.
2. **Continuing Education** – The Compliance Officer will actively seek out advice of bond counsel on any matters that appear to raise ongoing compliance concerns and may attend or participate in seminars, teleconferences, etc. sponsored by organizations such as the Massachusetts Collector-Treasurer Association and the Massachusetts Government Finance Officers Association that address compliance issues and developments in the public finance bond arena. In addition, national organizations such as the Securities Industry and Financial Markets Association (SIFMA) and the National Association of Bond Lawyers (NABL) offer numerous training opportunities and materials which may be useful to the Compliance Officer.

B. Tax-Exempt Bonds Compliance Monitoring

1. **Restrictions against Private Use** – The Compliance Officer will continuously monitor the expenditure of bond proceeds and the use of facilities or equipment financed or refinanced with bonds to ensure compliance with Section 141 which generally establishes limitations

on the use of bond-financed facilities by non-state or local governmental entities, such as individuals using bond-financed assets on a basis other than as a member of the general public, corporations and the federal government and its agencies and instrumentalities.

- a. **Use of Bond Proceeds** – The Compliance Officer will monitor and maintain records with respect to expenditures to ensure that bond proceeds are being used on capital expenditures for governmental purposes in accordance with the bond documents and document the allocation of all bond proceeds. Such monitoring is required not only for tax-exempt bonds, but also for tax credit bonds.

b. Use of the Bond-Financed Facility or Equipment

- i. **Equipment assets financed with bonds** will be listed in a schedule for each bond issue, which schedule may be included in the Tax Certificate. Equipment assets generally are not to be disposed of prior to the earlier of (a) the date the bonds and all subsequent refundings of such bonds are fully paid, or (b) the end of the useful life of such equipment. The Compliance Officer will maintain the list of all bond-financed equipment for each bond issue, together with the equipment's expected useful life.
- ii. **Constructed or acquired assets financed with bonds** – In order to ensure that assets constructed or acquired using bond proceeds, such as infrastructure assets, are not leased, sold or disposed of prior to the end of the term of the bonds and of all subsequent refundings of such bonds:
 - Any asset constructed or acquired with bond proceeds shall be flagged in the Issuer's records, and
 - These projects will be monitored by the Compliance Officer.
- iii. If there is any proposal to change the use of a bond-financed facility from a governmental purpose to a use in which a private entity may have the use or benefit of such a facility on a basis that is different from the rest of the general public, the Compliance Officer will consult with bond counsel prior to the occurrence of the proposed change in use.

2. Qualification for Initial Temporary Periods and Compliance with Restrictions against Hedge Bonds

a. Expectations as to Expenditure of "New Money" Bond Proceeds

- i. In order to qualify under the arbitrage rules for an initial temporary period of 3 years for "new money" issues during which bond proceeds can be invested without regard to Yield (but potentially subject to rebate), the Issuer must reasonably expect to spend at least 85% of "spendable proceeds" by the end of the temporary period. In general under Section 149, in order to avoid classification of an issue of bonds as "hedge bonds," the Issuer must both (x) reasonably expect to spend 85% of the "spendable proceeds" of the bond issue within the 3 year period beginning on the date the bonds are issued and (y) invest not more than 50% of the proceeds of the issue in investments having a

substantially guaranteed yield for 4 years or more. These expectations have been documented for the Issuer's outstanding bond issues in the tax certificates executed in connection with each bond issue.

- ii. If, for any reason, the Issuer's expectations concerning the period over which the bond proceeds are to be expended change from what was documented in the applicable tax certificate, the Compliance Officer will consult with bond counsel.

b. Project Draw Schedule Compliance Monitoring – While there are unspent proceeds of a bond issue, the Compliance Officer will compare and analyze the original anticipated project draw schedule and the actual expenditure payouts and reimbursements on each bond-financed project on an annual or more frequent basis. The purpose of this analysis is to determine the variances from the original expected draw schedule for each project and to document the reasons for these variances to provide a continual record on the spending progress of each bond-financed project. Factors relevant to the analysis include unexpected delays in the project timelines, extreme weather, contract time extensions due to unexpected events, supplemental agreements and any other factor with a potential to impact the progress or completion of the projects. Generally, there should be no effect on the tax-exempt status of the bonds under either the temporary period rules or the hedge bond rules if the actual disbursements do not meet the original project draw schedule, unless circumstances surrounding the actual events cast doubt on the reasonableness of the stated expectations on the issuance date. Therefore, it is important for the Compliance Officer to update the progress of each project at least annually, and consult with bond counsel as to any variance from the original schedule.

c. Bond Proceeds Expenditure Schedule Compliance Monitoring – While there are unspent proceeds of bonds, the Compliance Officer will compare and analyze the bond proceeds expenditure schedule and the actual investment earnings on each project on an annual or more frequent basis. The purpose of this analysis is to determine any variances from the expected expenditure schedule and to document the reasons for these variances.

3. Arbitrage Rebate Compliance

- a. Bonds may lose their tax-favored status, retroactive to the date of issuance, if they do not comply with the arbitrage restrictions of Section 148. Two general sets of requirements under the Code must be applied in order to determine whether governmental bonds are arbitrage bonds: the yield restriction requirements of Section 148(a) and the rebate requirements of Section 148(f).
- b. **Yield Restriction Requirements** – The yield restriction requirements provide, in general terms, that gross proceeds of a bond issue may not be invested in investments earning a yield higher than the Yield of the bond issue, except for investments (i) during one of the temporary periods permitted under the regulations (including the initial three year temporary period described above), (ii) in a reasonably required reserve or

replacement fund or (iii) in an amount not in excess of the Minor Portion. Under limited circumstances, the Yield on investments subject to yield restriction can be reduced through payments to the IRS known as Yield Reduction Payments. The Tax Certificate will identify those funds and accounts associated with a particular issue of bonds known, as of the date of issuance, to be subject to yield restriction.

c. Rebate Requirements

- i. If, consistent with the yield restriction requirements, amounts treated as bond proceeds are permitted to be invested at a Yield in excess of the Yield on the bonds (pursuant to one of the exceptions to yield restriction referred to above), rebate payments may be required to be made to the U.S. Treasury. Under the applicable regulations, the aggregate rebate amount is the excess of the future value of all the receipts from bond funded investments over the future value of all the payments to acquire such investments. The future value is computed as of the Computation Date using the bond Yield as the interest factor. At least 90% of the rebate amount calculated for the first computation period must be paid no later than 60 days after the end of the first computation period. The amount of rebate payments required for subsequent computation periods (other than the final period) is that amount which, when added to the future value of prior rebate payments, equals at least 90% of the rebate amount. For the final computation period, 100% of the calculated amount must be paid. Rebate exceptions and expectations are documented for each bond issue in the tax certificate executed at the time of such bond issue.
- ii. **While there are unspent proceeds of bonds, the Issuer will engage an experienced independent rebate analyst to annually calculate any rebate that may result for that year and annually provide a rebate report to the Compliance Officer. Bond counsel can assist with referrals to qualified rebate analysts.**

d. Timing of Rebate Payments

The Compliance Officer will work with the rebate analyst to ensure the proper calculation and payment of any rebate payment and/or Yield Reduction Payment at the required time:

- i. First installment due no later than 60 days after the end of the fifth anniversary of each bond issuance;
- ii. Succeeding installments at least every five years;
- iii. Final installment no later than 60 days after retirement of last bond in the issue.¹

4. Refunding Requirements

¹ Generally, rebate payments must be paid not later than 60 days after retirement of the last bond in the issue.

- a. **Refunded Projects** – The Compliance Officer will maintain records of all bond financed assets for each bond issue, including assets originally financed with a refunded bond issue.
- b. **Yield Restriction** – The Compliance Officer will work with its financial advisor and bond counsel to maintain records of allocation of bond proceeds for current and advance refundings of prior bond issues to ensure that such bond proceeds are expended as set forth in the applicable tax certificate executed at the time the refunding bonds are issued. Any yield restricted escrows will be monitored for ongoing compliance.

C. Record Retention

1. Section 6001 provides the general rule for the proper retention of records for federal tax purposes. The IRS regularly advises taxpayers to maintain sufficient records to support their tax deductions, credits and exclusions. In the case of a tax-exempt bond transaction, the primary taxpayers are the bondholders. In the case of other tax benefited bonds, such as “build America bonds” or “recovery zone economic development bonds”, the Issuer will be treated as the taxpayer. In order to ensure the continued exclusion of interest to such bondholders, it is important that the Issuer retain sufficient records to support such exclusion.
2. **In General**
 - a. All records associated with any bond issue shall be stored electronically or in hard copy form at the Issuer’s offices or at another location conveniently accessible to the Issuer.
 - b. The Compliance Officer will ensure that the Issuer provides for appropriate storage of these records.
 - c. If storing documents electronically, the Issuer shall conform with Rev. Proc. 97-22, 1997-1 C.B. 652 (as the same may be amended, supplemented or superseded), which provides guidance on maintaining books and records by using an electronic storage system. Bond counsel can furnish a copy of this Revenue Procedure if needed.
3. **Bonds** – Unless a longer period of time is required by state law, the Issuer shall maintain the bond record as defined in this section for the longer of the life of the bonds plus 3 years or the life of refunding bonds (or series of refunding bonds) which refunded the bonds plus 3 years. The bond record shall include the following documents:
 - a. **Pre-Issuance Documents**
 - i. **Guaranteed Investment Contracts (“GICs”) and Investments (other than Treasury’s State and Local Government Series Securities, “SLGs”)** – If applicable, the Compliance Officer shall retain all documentation regarding the procurement of each GIC or other

investment acquired on or before the date of bond issuance, including as applicable the request for bids, bid sheets, documentation of procurement method (i.e., competitive vs. negotiated), etc. If investments other than SLGs are used for a defeasance escrow, the documentation should include an explanation of the reason for the purchase of open market securities and documentation establishing the fair value of the securities and compliance with safe harbor bidding rules. If SLGs are purchased, a copy of the final subscription shall be maintained.

- ii. **Project Draw Schedule** – The Compliance Officer shall retain all documentation and calculations relating to the draw schedule used to meet the “reasonable expectations” test and use of proceeds tests (including copies of contracts with general and sub-contractors or summaries thereof).
 - iii. **Issue Sizing** – The Compliance Officer shall maintain a copy of all financial advisor’s or underwriter’s structuring information.
 - iv. **Bond Insurance** – If procured by the Issuer, the Compliance Officer shall maintain a copy of insurance quotes and calculations supporting the cost benefit of bond insurance, if any.
 - v. **Costs of Issuance documentation** – The Compliance Officer shall retain all invoices, payments and certificates related to costs of issuance of the bonds.
- b. **Issuance Documents** – The Compliance Officer shall retain the bound bond transcript delivered from bond counsel.
- c. **Post-Issuance Documents**

- i. **Post-Issuance Guaranteed Investment Contracts and Investments (Other than SLGs)** – the Compliance Officer shall retain all documentation regarding the procurement of any GIC or other investment acquired after bond issuance, including as applicable the request for bids, bid sheets, documentation of procurement method (i.e., competitive vs. negotiated), etc. If investments other than SLGs are used for a defeasance escrow, the documentation should include an explanation of the reason for the purchase of open market securities and documentation establishing the fair value of the securities and compliance with safe harbor bidding rules.
- ii. **Records of Investments** shall be retained by the Compliance Officer.
- iii. **Investment Activity Statements** shall be retained by the Compliance Officer.
- iv. **Records of Expenditures** – The Compliance Officer shall maintain or shall cause to be maintained all invoices, etc. relating to equipment purchases and constructed or acquired projects, either electronically or in hard copy.
- v. **Records of Compliance**

- **Qualification for Initial Temporary Periods and Compliance with Restrictions against Hedge Bond Documentation** – The Compliance Officer shall prepare the annual analysis described in Section II(B)(2) above and maintain these records.
- **Arbitrage Rebate Reports** may be prepared by the Compliance Officer or a third party as described in section II (B)(3) of this document and retained by the Compliance Officer.
- **Returns and Payment** – Shall be prepared at the direction of the Compliance Officer and filed as described in Section II(B)(3) of this document.
- **Contracts under which any bond proceeds are spent (consulting engineering, acquisition, construction, etc.)** – The Compliance Officer shall obtain copies of these contracts and retain them for the bond record.

d. General

- i. **Audited Financial Statements** – The Compliance Officer will maintain copies of the Issuer's annual audited Financial Statements.
- ii. **Reports of any prior IRS Examinations** – The Compliance Officer will maintain copies of any written materials pertaining to any IRS examination of the Issuer's bonds.

III. Voluntarily Correcting Failures to Comply with Post-Issuance Compliance Activities

If, in the effort to exercise due diligence in complying with applicable federal tax laws, a potential violation is discovered, the Issuer may address the violation through the applicable method listed below. The Issuer should work with its bond counsel to determine the appropriate way to proceed.

A. Taking remedial actions as described in Section 141

B. Utilizing the Voluntary Closing Agreement Program (VCAP) – Section 7.2.3 of the Internal Revenue Manual establishes the voluntary closing agreement program for tax-exempt bonds (TEB VCAP) whereby issuers of tax-exempt bonds can resolve violations of the Code through closing agreements with the Internal Revenue Service.

IV. Post Issuance Tax Compliance Procedures Review

The Compliance Officer shall review these procedures at least annually, and implement revisions or updates as deemed appropriate, in consultation with bond counsel.

Exhibit A

POST ISSUANCE COMPLIANCE NOTES
[Name of Bond]

Transaction Parties

Overall Responsible Party for Debt Management Activities _____

Bond Counsel _____

Paying Agent _____

Rebate Specialist _____

Other _____

EXHIBIT A

\$4,406,105
Monomoy Regional School District, Massachusetts
General Obligation Bond Anticipation Notes
Dated April 30, 2026

ISSUE PRICE CERTIFICATE AND RECEIPT

The undersigned, on behalf of the Successful Bidder, hereby certifies as set forth below with respect to the sale of the above-captioned obligations ("Issue") of the Issuer. Capitalized terms used and not otherwise defined herein shall have the respective meanings set forth in the Tax Certificate to which this Exhibit A is attached.

1. Reasonably Expected Initial Offering Price.

(a) As of the Sale Date, the reasonably expected initial offering price of the notes of the Issue to the Public by the Successful Bidder is the price listed in Schedule A ("Expected Offering Price"). The Expected Offering Price is the price for the notes of the Issue used by the Successful Bidder in formulating its bid to purchase the Issue. Reflected in Schedule B is a true and correct representation of the bid provided by the Successful Bidder to purchase the notes of the Issue.

(b) The Successful Bidder was not given the opportunity to review other bids prior to submitting its bid.

(c) The bid submitted by the Successful Bidder constituted a firm offer to purchase the notes of the Issue.

2. Receipt. The Successful Bidder hereby acknowledges receipt of the notes of the Issue from the Issuer and further acknowledges receipt of all certificates, opinions and other documents required to be delivered to the Successful Bidder, before or simultaneously with the delivery of such notes of the Issue, which certificates, opinions and other documents are satisfactory to the Successful Bidder.

The representations set forth in this certificate are limited to factual matters only. Nothing in this certificate represents the Successful Bidder's interpretation of any laws, including specifically Sections 103 and 148 and the Regulations thereunder.

[Remainder of page intentionally left blank; signature page follows.]

The undersigned understands that the foregoing information will be relied upon by the Issuer with respect to certain of the representations set forth in the Tax Certificate and with respect to compliance with the federal income tax rules affecting the Issue, and by Troutman Pepper Locke LLP in connection with rendering its opinion that the interest on the Issue is excluded from gross income for federal income tax purposes, the preparation of the Internal Revenue Service Form 8038-G, and other federal income tax advice that it may give to the Issuer from time to time relating to the Issue.

Dated: April 30, 2026

HUNTINGTON SECURITIES, INC.

By: _____
Name:
Title:

SCHEDULE A TO EXHIBIT A
EXPECTED INITIAL OFFERING PRICE TO THE PUBLIC

Pricing Summary

Maturity	Type of Bond	Coupon	Yield	Maturity Value	Price	Dollar Price
09/18/2026	Serial Note	4.000%	2.700%	4,406,105.00	100.493%	4,427,827.10
Total	-	-	-	\$4,406,105.00	-	\$4,427,827.10

SCHEDULE B TO EXHIBIT A

SUCCESSFUL BIDDER'S BID

Huntington Securities, Inc. - Chicago , IL's Bid



Monomoy Reg SD \$4,406,105 General Obligation Bond Anticipation Notes

For the aggregate principal amount of \$4,406,105.00, we will pay you \$4,425,403.74, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate:

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
09/18/2026	4,406.105M	4.0000	2.7000	100.493

Bid: 100.438000
Premium: \$19,298.74
Net Interest Cost: \$48,261.54
NIC: 2.857391
Time Last Bid Received On: 04/01/2026 10:45:30 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Huntington Securities, Inc., Chicago , IL
Contact: Daniel Kelly
Title:
Telephone: 203-258-8240
Fax:

EXHIBIT B

\$4,406,105

Monomoy Regional School District, Massachusetts

General Obligation Bond Anticipation Notes

Dated April 30, 2026

CERTIFICATE OF THE MUNICIPAL ADVISOR

The undersigned, on behalf of the Municipal Advisor, has assisted the Issuer in soliciting and receiving bids from potential underwriters in connection with the sale of the notes of the Issue in a competitive bidding process in which bids were requested for the purchase of such notes at specified written terms set forth in the Notice of Sale, a copy of which is attached to this certificate as Attachment 1. Capitalized terms used and not otherwise defined herein shall have the respective meanings set forth in the Tax Certificate to which this Exhibit B is attached. The competitive sale requirements (as defined in the Notice of Sale) for the notes of the Issue were met. The Municipal Advisor further advises as follows:

1. The notes of the Issue were offered for sale at specified written terms more particularly described in the Notice of Sale, which was distributed to potential bidders.

2. The Notice of Sale was disseminated electronically through PARITY. The method of distribution of the Notice of Sale is regularly used for purposes of disseminating notices of sale of new issuances of municipal bonds, and notices disseminated in such manner are widely available to potential bidders.

3. To the knowledge of the Municipal Advisor, all bidders were offered an equal opportunity to bid to purchase the notes of the Issue so that, for example, if the bidding process afforded any opportunity for bidders to review other bids before providing a bid, no bidder was given an opportunity to review other bids that was not equally given to all other bidders (that is, no exclusive "last-look").

4. The Issuer received bids for the notes of the Issue from at least three Underwriters who represented that they have established industry reputations for underwriting new issuances of municipal bonds. Based upon the Municipal Advisor's knowledge and experience in acting as the Municipal Advisor for other municipal issues, the Municipal Advisor believes those representations to be accurate. Copies of any written bids received are attached to this certificate as Attachment 2. Bids not reflected in Attachment 2, if any, were received by telephone rather than in writing.

5. The winning bidder for the notes of the Issue was the Successful Bidder, whose bid was determined to be the best conforming bid in accordance with the terms set forth in the Notice of Sale, as shown in the bid comparison attached as Attachment 3 to this certificate. The Issuer awarded the notes of the Issue to the Successful Bidder.

6. The Yield on the Issue is 2.7048434% as shown on the attached Schedule A.

The representations set forth in this certificate are limited to factual matters only. Nothing in this certificate represents the Municipal Advisor's interpretation of any laws, including specifically Sections 103 and 148 and the Regulations thereunder.

[Remainder of page intentionally left blank; signature page follows.]

The undersigned understands that the foregoing information will be relied upon by the Issuer with respect to certain of the representations set forth in the Tax Certificate to which this certificate is attached and with respect to compliance with the federal income tax rules affecting the Issue, and by Troutman Pepper Locke LLP in connection with rendering its opinion that the interest on the Issue is excluded from gross income for federal income tax purposes, in the preparation of the Internal Revenue Service Form 8038-G, and in providing other federal income tax advice that it may give to the Issuer from time to time relating to the Issue. The Issuer and Troutman Pepper Locke LLP may also rely on the foregoing information for purposes of determining compliance with Section 21A of Chapter 44 of the Massachusetts General Laws, if applicable. No other Persons may rely on the representations set forth in this certificate without the prior written consent of the Municipal Advisor.

Dated: April 30, 2026

HILLTOP SECURITIES INC.

By: _____
Name:
Title:

ATTACHMENT 1 TO EXHIBIT B

NOTICE OF SALE

Monomoy Regional School District

Scott Carpenter, Ed.D.
Superintendent

Michael MacMillan
Business Manager

Melissa Maguire
Director of Student Services



Robin A. Millen, Ed.D.
*Assistant Superintendent of
Curriculum, Instruction and Assessment*

Jacob Voelker
Treasurer

To: MONOMOY REGIONAL SCHOOL COMMITTEE
From: Michael MacMillan
Date: March 12, 2026
Re: Student Activity Account: MRHS Animal Welfare Club

MOTION

To approve the donation of \$35 from the Monomoy Regional High School Animal Welfare Club Account to Animal Legal Defense Fund.

BACKGROUND

Massachusetts General Law allows school districts to receive, deposit and expend funds on behalf of students in connection with student activities (MGL c.71 § 47) . The district has bank accounts set up for this purpose and a number of recognized activities.

The Massachusetts Department of Elementary and Secondary Education recommends that School Committee approval is required for charitable donations from student activity accounts.

The funds were raised by selling dog treats. The donation supports the mission to protect the lives and advance the interests of animals through the legal system.

Michael MacMillan
School Business Manager

Jennifer Police
Principal
jpolice@monomoy.edu

David Alexander
Assistant Principal
dalexander@monomoy.edu

Annmarie Rita
Assistant Principal
arita@monomoy.edu



MONOMOY REGIONAL HIGH SCHOOL

75 Oak Street
Harwich, MA 02645
Phone 508-430-7200
Fax 508-430-7223

Karen Guillemette
Director of Athletics
kguillemette@monomoy.edu

Lindsay Ginnetty
Director of Guidance
lginnetty@monomoy.edu

Jacqueline Corrigan
Special Education Team Chair
jcorrigan@monomoy.edu

Animal Legal Defense Fund
PO Box 96041
Washington, DC 20077

Dear Animal Advocates,

Our school's Animal Welfare Club recently held a small fundraiser for two animal organizations whose work we admire. Enclosed please find a check in the amount of \$35.00 (Thirty-five Dollars). We wish we could give more but it's a start. Please send us an acknowledgement for our records and thank you for all the great work you do to protect animals.

Sincerely,
Lisa Forte Doyle and Beth Howe
Co-Advisors, Animal Welfare Club
Monomoy Regional HS

Purchase Order

Monomoy Regional School District
Business Office
425 Crowell Road
Chatham MA 02633

No. 262222

MAIL INVOICES TO THE ADDRESS ABOVE
DO NOT EXCEED PURCHASE ORDER TOTAL

Tax Exempt # 451 833 513
PRICE CHANGES REQUIRE PRIOR APPROVAL
BY
THE BUSINESS OFFICE

P.O.# must be on ALL documents
MSDS sheets must accompany all products

P.O. Date: 03/27/2026**Questions ?** Accounts Payable (617) 848-0617**Ext:****Account:****P.O. Issued To :****Ship To:**

Animal Legal Defense Fund
PO Box 96041
Washington DC 20077

Monomoy Regional High School
Attn: Lisa Forte Doyle
75 Oak Street
Harwich MA 02645
(617) 848-0617

Contact: Eliot Cirivello**Location:** Monomoy Regional High School**Phone:** (707) 795-2533**Fax:****Project:** Undesignated**Req#** 62412**Reference:****Date Required:** 04/09/2026**Award Number:**

Line	Qty	Unit	Part#	Description	Account Number	Unit Price	Extended	Tax	Freight
1	1	EA		Donation to Animal Legal Defense Fund from Animal Welfare club	8900.22.3520.385.670.000.0000 SA Agy MRHS Otr Std Acts Animal	35.00	35.00	0.00	0.00

APPROVAL SIGNATURES:

**Sub-Total:** 35.00**Freight:** 0.00**Tax:** 0.00**Total Amount:** 35.00**NOTES:****Order Via:**

Email

ENTITY COPY

Friday, March 27, 2026

Page 1 of 1

File DJG:

Vendor Relations

Representatives of firms doing or hoping to do business with the school system will be ~~acknowledged and interviews granted or not, depending on the circumstances~~ **limit their visits to staff members designated by school officials**. Personnel charged with the purchasing function will ~~not be required to put their time at the indiscriminate use of sales personnel, who will limit their visits to staff members designated by school officials~~ **judiciously use their judgment in deciding which vendors to meet with.**

Adopted: March 27, 2013

Revised:

**Monomoy Regional School District
Middle School Pathway Exploration Policy**

I. Overview

The policy's main goal is to bridge the gap between middle school and high school by ensuring that students can make informed decisions about their future educational and career paths. It promotes a personalized education and career plan to help students set goals and explore the various options available to them to support their post-high school aspirations.

Students will be made aware of and gain exposure to pathways, examples include, but are not limited to:

- Career and Technical Education (CTE) Partnership Programs
- Innovation Career Pathways
- Early College programs
- Other local programs and coursework choices

II. Student Outcomes:

- Identify available pathways
- Understand potential career opportunities within those pathways
- Comprehend pathway-specific student outcomes (e.g., credentials, work-based learning, college credit)
- Analyze and evaluate pathways based on their interests and skills
- Create a reflection and course plan that aligns with their goals

III. High School (Grades 8-12+) Pathway options available to students

Students in Grades 6 and 7 will have opportunities to learn about the available high school pathways that include, but are not limited to:

- Monomoy Regional High School
- Course Offerings and Electives
- Innovation Pathway
- Project Lead The Way
- MyCAP (My Career and Academic Plan) - grant funded for 2025-2026
- MEFA (College and career planning portal for Massachusetts students in grades 6-12)
- MA Hire Partnership
- Internship program

- Work-Based Learning
- Advanced Placement (AP) courses and AP Capstone Diploma
- Special education career planning with scope and sequence
- Community service
- Dual Enrollment opportunities
- Cape Cod Regional Vocational Technical School

IV. Middle School Career Exploration

Currently, the district utilizes Naviance at the high school to engage students with college and career preparedness. The district received a grant to pilot MyCAP for the 2024-2026 school year, and this will be further explored for the middle school.

The middle school will begin accessing MEFA to begin developing student portfolios, career exploration, and college exploration. Additionally, the Mass Career Development Model will be used to facilitate career and college exploration.

MyCAP will also be explored for implementation in the 2027 school year.

V. Activities and Procedures to Collaborate with CTE and Other Opportunities

The district engages in the following activities:

- Counselors from the high school present to grades 6 and 7 the available high school options available to them.
- Counselors from Cape Cod Technical Vocational High School present to grades 6 and 7
- Counselors conduct Minute meetings to focus on exploration, where a student takes a preference assessment in class, then the counselors follow up in a minute meeting to talk through the results.
- Career Day (every three years)
- 7th grade pathway program - students are able to choose from three pathways (90 days of classes) - Advanced STEM, Language, or Music.
- 6th grade community heroes project
- Community Service Learning Class - 5th and 6th grade 30 day class to focus on citizenry and includes exposure to careers through curriculum and community projects.

VI. Information on Career Technical Education Programs

The district provides middle school students with information about career technical education programs and careers, by October 15th each year, including, but not limited to the following:

- presentations
- emails to families
- websites

Additionally, information goes out in newsletters each trimester from the counseling team and the annual plan is sent to families.

VII. Middle School CTE Tour Policies

Monomoy Regional School District will provide all middle school students with an opportunity to tour CTE schools and programs during regular middle school hours. The transportation costs will be assumed by the school hosting the tours.

Students will not receive an unexcused absence if the CTE school or program confirms the student's participation in a tour.

The district will work with Cape Cod Regional Technical High School to coordinate and schedule tours.

VIII. Providing Records to CTE Schools and Programs

Monomoy Regional School District **will only release information requested by the CTE school that is relevant to the application policy for the CTE school (information related to lottery weights [i.e. attendance, discipline, student interest]).**

- The counseling staff will work with the liaison at the CTE school or program to ensure records are shared.
- **The district will provide names and addresses of 7th and 8th grade students to CTE schools by October 15.**

IX. Maintenance of Records

Monomoy Regional School District will maintain documentation of student participation in tours and other elements of this policy implementation, such as sharing of contact information, MyCAP/Naviance, and CTE access schedules.

Adopted: 10/23/2025